

PRE-CAMPAIGN STUDY CONTRACT

Provided for

The Rescue Mission
Fort Wayne, Indiana

September 17, 2015

INTRODUCTION

This contract formalizes a consulting relationship between **The Rescue Mission** (Client) and **The Timothy Group** to conduct a pre-campaign study to determine the Client's readiness to conduct a capital project campaign.

THE TIMOTHY GROUP WILL

- 1.1 Prepare a proposed timeline of important dates for the study.
- 1.2 Assist the Client in preparing a case statement describing campaign plans.
- 1.3 Prepare a first draft of all letters and questionnaires, with final approval given by the Client.
- 1.4 Obtain reactions to information in the case statement as follows:
 - 1.4a Up to 60 personal interviews, to be conducted by phone or in person, with key donors, staff, board, and significant stakeholders.
 - In-person interviews are not to exceed 3 consecutive days, including travel time, with a minimum of 8 interviews per day. (Each additional interview day provided will cost \$1,500.)
 - Interviews will be scheduled by the Client but conducted by a Timothy Group representative.
 - 1.4b Mailed/e-mailed questionnaires to 1,000 people selected randomly from the Client's current donor list and/or names added for the purpose of this study.
 - The Client will mail the questionnaires.
 - The Timothy Group will design the online survey.
 - The Client will supply a link for constituents to fill out the online questionnaire.
 - The Timothy Group will receive and compile the responses.
- NOTE: During the interview process we may ask how much individuals would consider giving to the proposed project over and above their current giving. This is being done for research-gathering purposes only. This is neither a donor call nor a request for a gift.
- 1.5 Tally the results from all interviews and completed questionnaires.
- 1.6 After careful compilation and analysis, The Timothy Group will prepare a detailed Pre-Campaign Study Report.
 - Up to 10 bound copies and a PDF document will be supplied to the Client. (More bound copies can be ordered at an additional cost.)

- 1.7 The Timothy Group Consultant will personally present the report to Client staff and volunteer leaders, explaining study results and focusing on recommendations.
 - Generally, this presentation takes place 120 days following the start of the study.
- 1.8 Successful completion of this process in the stated time frame is heavily contingent upon expedient and satisfactory response from the Client.

CLIENT WILL PROVIDE

- 2.1 Identification of all study participants.
 - The Client is responsible for the quality of all lists of names, including phone numbers and addresses.
- 2.2 The printing and mailing of all letters and study materials.
- 2.3 The scheduling of all personal interviews.
 - In-person interviews will be conducted on weekdays, normally between 8:00 a.m. and 9:00 p.m.
 - Interviews should begin 30-45 days following the start of material development.
- 2.4 Access to board and staff.
- 2.5 Access to historical donor information.
- 2.6 Clerical support as necessary.

CONFIDENTIALITY

- 3.1 To execute this agreement properly, The Timothy Group will need access to certain of the Client's confidential information, including donor lists, future plans, business strategies, and other proprietary information (collectively, the "Confidential Information"). Confidential information must be clearly marked or identified as such. The Timothy Group agrees that it will take reasonable steps to ensure that confidential information is not divulged, disclosed, or communicated to any third party without the prior written consent of the Client. Confidential information shall not include information previously known to The Timothy Group, properly received from a third party, or in the public domain.

FINANCIAL INVESTMENT

- 4.1 The Timothy Group's account service fee is \$15,500. The fee may be paid in full with the signing of the contract or in four equal payments as follows:
 - 4.1a \$3,875 with the signing of the contract, followed by
 - 4.1b \$3,875 each month for the next three consecutive months. Payment is due the first of each month.
 - 4.1c The contract will begin October 1, 2015, and will conclude February 1, 2016.
- 4.2 Client is responsible for Business Reply Envelope (BRE) permit fees and mailing or postage costs. Postage costs equal the price of first-class postage plus ten cents for each piece received.
- 4.3 In addition to account service fees, the Client may incur these additional expenses including, but not limited to: ad placement, ad design, printing/photocopying, postage, graphic design, and any other materials required to accomplish the service. Any expenses incurred for these items will be at the specific request of the Client and will be approved in advance.
- 4.4 The Client is responsible for all travel expenses (e.g., airfare, meals, car rental, mileage, and lodging), which will be billed as incurred each month, in addition to the Account Service Fee.
- 4.5 Late payment may result in a 1.5% per month service charge.
- 4.6 This contract must be signed by all parties and returned within thirty (30) days, or fees may be subject to change.

COMPLIANCE GUIDELINES

- 5.1 The Timothy Group verifies that it is in compliance with the requirements of the State of Indiana as professional fundraising counsel.
- 5.2 Client certifies that The Rescue Mission is registered as a charitable organization in the State of Indiana, or has proven exemption for registration due to the nature of the ministry.
- 5.3 Client certifies that the item or items being purchased are to be used or consumed in connection with the operation of The Rescue Mission.
- 5.4 Client is registered with the IRS as a non-profit organization and is an approved 501(c)(3).
- 5.5 The Timothy Group will not have custody or control of any contributions at any time.
- 5.6 The Timothy Group is incorporated in the State of Michigan (Federal Identification Number 38-2971491).

SIGNATURES

The signing of this contract certifies that **The Rescue Mission**, or its Board, has the financial strength to pay the fees called for in this development program and will do so according to the above schedule, and that **The Timothy Group** will maintain and commit the resources to accomplish the services described above.

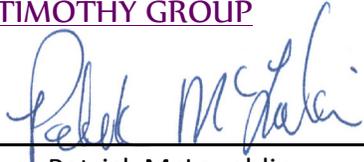
FOR THE CLIENT

Name _____

Title _____

Date _____

FOR THE TIMOTHY GROUP

Name  _____
Patrick McLaughlin

Title President/Founder

Date September 17, 2015

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