



Using resources

Selecting Fundraising Consultants

Fundraising can be a touchy and challenging issue for congregations. Growth, expansion, remodeling and repairs often require leaders to focus on the money necessary to most successfully continue the congregation's ministry and spiritual education. Professional fundraising consultants can put their experience and expertise to work, bringing a sense of accomplishment, community and fulfillment to a congregation's stewardship efforts.

Following are recommendations from consultants and congregational leaders on how to select a fundraising consultant.

Get a little help from your friends. Ask around and find out whom other congregations hired as their fundraising consultants. What did they think of that person or firm? What were the pros and cons of working with that particular fundraiser? Their thoughts and comments can help you decide which consulting firms to consider.

Does your denomination provide fundraisers? Keep in mind that many denominations have in-house fundraising consultants. These professionals can often help your congregation with the beginning stages of planning or even take you through the entire campaign, depending upon the size of your plan and their time and abilities.



Let your fingers do the walking.

Once you decide on a few fundraising consultants whom you would like to consider, contact them and ask that they send you some preliminary information.

Find out what kinds of services they provide. Once you have this

information, decide which fundraisers you would like to interview and set up a face-to-face meeting.

Meeting face-to-face. There are a variety of interview approaches, depending upon the fundraiser with whom you are working. Some believe you should talk to the person who will actually be working with your congregation on the fundraising campaign. Others send a sales person or field representative to the initial interview to provide general information, and then encourage a second interview with a specific fundraising consultant from their organization. Either way, it is important that your leaders meet with the prospective consultant in person before making the decision to hire that fundraiser.

Using Resources is a series published by the Center for Congregations designed to help congregations make effective use of specific kinds of resources. It is our hope that you will find them useful in your work as a congregation.

Look for a good "fit." Consultants and congregational leaders agree that positive chemistry is imperative to a successful campaign. You need a good and comfortable working relationship between leaders and the fundraiser. Look for someone who understands and fits with the culture of your congregation.

Help the consultant to see your vision. Let your prospective fundraisers know your plans and vision for the future. The size of your project directly impacts the size of your capital campaign. Some consultants and firms specialize in various types of fundraising efforts. Information given up front can help you find the best match to meet your particular needs.

Experience, experience, experience. Not only is experience in fundraising a must, but also knowledge specifically of congregational fundraising is important. Capital campaigns in religious organizations are different than other non-profit groups. Some experts even recommend looking for someone with experience with your particular denomination and demographics.

Look for someone who can communicate trust. A congregation and its leaders need to feel a high degree of trust in the consultant. Find someone who makes you feel confident in his or her leadership, honesty and integrity.

Consultant needs to understand you. He or she needs to understand who you are as a congregation. Excellent consultants will be willing to work with your congregation's individuality rather than trying to put you in a pre-pressed mold. Keep the dialogue flowing. Communication must come easily between the congregational leaders and the consultant. Look for someone who will keep you informed and listen to your needs and concerns.

How do they rate? When choosing a consultant, be sure to obtain written and oral references. Other clients' experiences are usually telling as to the way the consultant does business.

Beware of commissions. Look for a consultant who charges a flat fee for his or her services. Beware of those who charge a percentage or bonus. The fundraiser should be able to tell you the fee up front.



Know the costs. Once you know the fee, find out when it is due. Can payments be made in installments? How does the consultant wish to be paid? Does the fee include travel and expenses? Does it include the feasibility study?

Who is doing what? Fundraising consultants differ in the services they provide. Find out just what the consultant plans to do and what he or she expects the congregation to do. Clearly defined duties will help you determine if this is the fundraiser for you and will minimize surprises down the road.

Feasibility study. Some fundraising consultants conduct a feasibility study to reveal the congregation's fundraising capacity. Find out if the consultants you are considering will conduct a feasibility study and how. How will the consultant study and compile this information? Other fund consultants believe that feasibility studies are detrimental to a fund campaign because they sway the focus to money rather than ministry. How does your congregation feel about a feasibility study?

Helping you to help yourself. A good fund consultant will help the congregation take ownership of the fundraising campaign. Involving many members and attendees from throughout your congregation will raise enthusiasm and give new life to the campaign and to your ministry.

On-the-job training and education. Look for a consultant who will provide training and help equip congregational leaders with the skills necessary to conduct the fundraising campaign.

It's not cheap, but it's worth it. Hiring a professional fundraiser can be expensive, but the benefits exceed the cost. Congregations that hire consultants usually enjoy successful campaigns. Some say that they were amazed at how much money and enthusiasm were raised. They would not have anticipated that before working with their professional fundraising consultant.

Selecting just the right consultant can make a marked difference in the success of a congregation's capital campaign. Considering the above issues can bring about the discussion and understanding necessary to select the consultant who is best suited to a particular project and congregation.

Information for this piece provided by many sources, including David McDonald of Advent Inc.; Clif Christopher of Horizons Stewardship Co. LLC; Tommy Blakely of Resource Services Inc.; Jessica White of Jessica White Associates; Rev. Craig Parker of Bridgeway Community Church; Rev. Mike Reed of Fishers United Methodist Church; Rev. Tom True of First United Methodist Church in Shelbyville; and Rev. Karen Devaisher and Bill Pfaffenberger of Avon United Methodist Church.



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Questions to Ask a Fundraising Firm

Information is invaluable in choosing a fundraising consultant. It is important for a congregation to know as much as possible about the consultant before making the decision to hire him or her. The following questions are imperative to help leaders weigh the consultant's attributes.

- How will the invitation to give be presented to the congregation?
- How will you, the consultant, get to know our congregation?
- How is your standard methodology adapted to accommodate the unique qualities of our congregation?
- What is your approach to feasibility studies that determine how much a congregation can raise? Do you conduct them? If so, how?
- What kind of follow-up work will you provide after the campaign is completed? Is there an additional cost for follow-up work?
- How are our roles — as the consultant and the congregational leadership — defined?
- What is your fee structure? Are expenses included in the fee? What is the payment schedule?
- Provide a list of references from the past two years — three successful congregational campaigns and one failure and their campaign financial goals (failure may be that the congregation resigned from the process).

RESOURCES

Holliman, Glen N. and Barbara L. Holliman. *With Generous Hearts: How to Raise Capital Funds for Your Church, Church School, Church Agency or Regional Church Body*. Harrisburg, PA: Morehouse Publishing, 2005.

This book is an excellent overview of capital campaigns. Capital campaign consultants Glen and Barbara Holliman emphasize the importance of a thorough feasibility study and the need for advanced gifts. Revised from the 1997 edition, this version features new information and insights on the discernment process, annual stewardship campaigns and planned-giving programs.

Reeves, Michael. *Extraordinary Money! Understanding the Church Capital Campaign*. Nashville, TN: Discipleship Resources, 2002.

If you and your congregation are considering a capital campaign, this slim volume is a good place to start. Capital campaign directors and committees will find this book helpful to read and discuss before they launch a capital campaign. The book includes questions to ask a fundraising consultant and tips for engaging congregation members

For information about fundraising and fundraising consultants, contact the Center for Congregations at info@centerforcongregations.org or 317-237-7799 (Indianapolis), 260-435-1880 (Fort Wayne), 812-618-2012 (Evansville) or toll-free at 866-307-2381.