

Fundraising Consultants

by Jane Cowan

To complete a sizable restoration project such as roof replacement, stained glass window restoration, or structural work, a congregation often turns to several building experts for advice, guidance, and leadership. What about taking that approach when it comes to raising money?

A fundraising consultant is an individual or firm that is hired to help an organization raise money for a specific project. A development consultant helps to prepare a business or organization for income; this service may include tasks such as preliminary research that are relevant to fundraising but aren't part of a direct request for money. Fundraising or development consultants possess experience, expertise, and organizational skills to help fundraising campaigns run smoothly and meet their goals.

Development consultants are hired according to the congregation's needs. Sometimes, they manage a fundraising campaign from beginning to end; other times they will assist only with planning or with one specific job, such as grant writing. Consultants can help to generate a compelling statement of need, develop promotional materials, and train volunteers. They often complete feasibility studies so that congregations can assess how successful a fundraising campaign is likely to be. A feasibility study is a preliminary analysis of the attitudes, expectations, and giving ability of an organization's constituency. By conducting interviews with members of a congregation and its surrounding community, the consultant learns about the best strategies for fundraising. The study can help with developing a campaign message, timing appeals, and identifying potential donors.

When consultants are hired for long-term assistance, they often manage all aspects of a campaign. Their expertise in generating schedules, short-term goals, and leadership structures ensures that the campaign is carried out in an organized, orderly manner. Joan Flanagan, a consultant and fundraising trainer based in Chicago, said, "Since fundraisers have the experience of working on other campaigns, they know the importance of creating a structure to ensure its success." Once committees and subcommittees are in place, with clearly defined and attainable goals, "the fundraising process doesn't seem so foreboding," noted Ms. Flanagan.

Fundraising consultants may seem like godsend, but they are not miracle workers. They work with congregations, so members must be informed and supportive about the campaign and its goals. As with most other aspects of repair projects, an invested congregation with qualified and dedicated leadership provides a good foundation for success. Joan Swan, a development consultant in Manhattan, pointed out: "Before you go outside, you've got to go inside." Glen Holliman, a consultant with Holliman Associates, based in Pennsylvania, agreed, "Campaigns fail if only a few people are making the key decisions."

Consultants are usually hired during the planning phase of a repair project. A feasibility study is conducted after a scope of work has been identified, before a fundraising goal has been announced. Some congregations begin researching development consultants as they seek building design consultants, such as architects or engineers.

The consultant's fee and method of payment is based on the scope of the project, length of the contract, and individual preference, among other factors. Some consultants are paid hourly or by the day or month, while others are given a flat fee for the life of the contract. Congregations and consultants should work out a mutually agreed upon payment schedule. The one thing that a congregation should not accept is a consultant who wants to be paid a percentage of the money raised. This is considered unethical, as the temptation to misrepresent the cause can seem too great because the consultant will personally benefit from the money raised.

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Congregations often have a difficult time deciding whether to hire a fundraising or development consultant. The situation may seem like a Catch-22: congregations need to raise money, which is why they would want to hire a consultant, but they worry about spending much-needed money on a consultant's services. One way to begin making the decision is by assessing the skills and talents that can be drawn from within the congregation. Are there people who could provide legal expertise? What about experience with writing, fundraising, photography and design, public relations, volunteer training, or database systems? If a congregation is

Factors to consider when choosing a consultant:

Adapted from *The Complete Guide to Capital Campaigns for Historic Churches and Synagogues*, by Peggy Powell Dean and Susanna A. Jones, published by Partners for Sacred Places (See **Resources**, page 18, for ordering information.):

Experience: How long has this consultant been in the field? On what other campaigns has s/he worked? Does the experience include campaigns that solicit funds from the greater community, or is it limited to congregational campaigns? What does s/he consider to be his greatest successes? Worst failures?

Methodology: How does the consultant work? What approach or process is used? What services are provided? What services must the institution/organization provide?

Cost: How does he bill his/her time? What is included in the fee? What services are extra? What additional fundraising expenses is the organization likely to incur? What provisions can be made for time and cost overruns?

Empathy: Do you like the consultant? Is s/he sympathetic to the special concerns of the congregation?

Creativity: Do materials from other campaigns reflect creativity or do they all look alike? Will s/he tailor a plan that capitalizes on the institutions strengths and compensates for its weaknesses?

Flexibility: Is it possible to choose which services to purchase, or is a full service package required? Under what conditions can the contract be modified or canceled?

missing many of these skills, a consultant can work to fill in the gaps. For congregations with shared-use arrangements, an outside consultant can coordinate fundraising initiatives among several organizations. A congregation might choose to initially hire a consultant to produce a feasibility study, which can be paid for by existing reserve funds, a single donor, or denominational resources. Then the congregation could assess whether to continue to retain the consultant's services. Alternatively, several consultants could be interviewed to find out about their services and decide whether hiring one would be beneficial.

The First Presbyterian Union Church of Owego chose to hire development consultants for two campaigns. Deciding to use a consultant for the first one was relatively simple: "We knew we needed to raise an extraordinary amount of money, way beyond our yearly offering," said the Reverend Kevin Stainton, pastor of the church. The consultant was hired through the Presbyterian denomination, which manages a service that provides consultants for a fee based on a congregation's membership. When the First Presbyterian

Union Church was ready to approach its second campaign, there was some debate about hiring another consultant. "The consultant had already been there so we knew how to do it," explained Pastor Stainton. But the church's leadership had noticed that the consultant's direction had allowed them to spend less time promoting the campaign and more time on actual fundraising, and they decided to again hire outside help. Both campaigns raised more money than the consultants initially predicted. "We found the consultants very helpful in showing us what to do and how to do it. They helped us to understand giving in a different way, and to get to a giving level we hadn't before," added Pastor Stainton.

Still, most congregations that the Sacred Sites Program works with have goals of \$150,000 or less, and do not use consultants. The First English Lutheran Church in Syracuse, NY and the Reformed Dutch Church of Claverack, NY are both running campaigns on their own. Frank Starkes, who is managing a \$125,000 campaign in Claverack, said he didn't even know such consultants existed. The congregation felt confident about raising the money on its

own. In Syracuse, the Reverend Craig Herrick is overseeing a \$200,000 campaign. The pastor had been successful with smaller projects and felt that he had the organizational ability to coordinate the campaign. If the project was estimated at \$500,000 or more, Pastor Herrick said, he would consider hiring a fundraising consultant, or if the congregation was building a new structure.

Congregations hiring consultants should seek recommendations for people who have worked on similar campaigns. Ms. Swan stressed that congregations should strive to find an individual with experience working for religious properties. "Faith communities are very distinctive and special within themselves, and the consultant needs to have a sensitivity and understanding of that," she explained. Preservation organizations such as the Sacred Sites Program or the National Trust for Historic Preservation can provide referrals; denominational offices often yield a list of suitable candidates as well. Organizations like the Association of Fundraising Professionals, the Foundation Center, and the American Association of Fundraising Counsel can also be of assistance. (See **Resources**, page 18, for more information.)

Resources

Cobblestone Architecture

Interesting books on cobblestone architecture include: *Cobblestone Landmarks of New York State* by O.W. Shelgren, C. Lattin, and R. W. Frasch; *The American Builder's Companion* by Asher Benjamin (reprint available from Dover Books); and *Introduction to Early American Masonry* by Harley J. McKee.

The Cobblestone Society Museum in Childs, NY maintains a the Cobblestone Society Resource Center. The museum office can be reached at (716) 589-9013; the center at (716) 589-6467.

American Stained Glass

For more information about The Census of Stained Glass Windows in America and its publications on survey, conservation, and restoration, see <http://carver.holycross.edu/organizations/csga/>.

Among the publications on the history of American stained glass are: *Glory in Glass, Stained Glass in the United States: Origin, Variety and Preservation*, a 250 page exhibition catalog from the 1998-1999 exhibition at the American Bible Society Gallery in New York; \$29.95 from the ABS, (212) 408-1201. *In Pursuit of Beauty: Americans and the Aesthetic Movement* (New York: The Metropolitan Museum of Art/Rizzoli, 1986) an exhibition catalog with a chapter and bibliography on stained glass. See also Ms. Frelinghuysen's essay on pages 350 to 353 in the catalog for *Art and the Empire City: New York, 1825-1861* (New York: The Metropolitan Museum of Art, 2000). Finally, *Stained Glass from Medieval Times to the Present: Treasures to be Seen in New York* by James L. Sturm, photographs by James Chotas (New York: E.P. Dutton, Inc., 1982), out-of-print.

Who Does What

The New York Landmarks Conservancy publishes the *Restoration Directory*, a listing of professionals including architects, engineers, and conservators, whose experience and skill in preservation has been pre-qualified by the Conservancy. Most firms are located in the New York metropolitan area. Call the Conservancy at (212) 995-5260 to request a copy.

Project Management

Contact the Sacred Sites Program at (212) 995-5260 for recommendations of building conservators who work as project managers for congregations.

Development Consultants

With Generous Hearts and *An Introduction to Planned Giving for Congregations*, both by Glen and Barbara Holliman, may be useful for understanding the role of development consultants. Available from Morehouse Publishing Group, P.O. Box 1321, Harrisburg, PA 17105, (800) 877-0012. Also helpful are *The Grass Roots Fundraising Book* and *Successful Fundraising*, both by Joan Flanagan, available from NTC/Contemporary Publishing Group, 4255 West Touhy Avenue, Lincolnwood, IL 60712, (800) 323-4900.

The Complete Guide to Capital Campaigns for Historic Churches and Synagogues, by Peggy Powell Dean and Susanna A. Jones, may be ordered from Partners for Sacred Places, 1700 Sansom Street, 10th floor, Philadelphia, PA 19103; tel: (215) 567-3234; web: www.sacredplaces.org/pubs.htm.

The Association of Fundraising Professionals' website (www.afp.org) features the "Donor's Bill of Rights."

The Foundation Center, at 79 Fifth Avenue, NYC, (212) 620-4230, maintains a notebook of consultants. Visiting their website (www.fdncenter.org) and clicking on "cooperating collections" will provide a link to databases nationwide.

The American Association of Fundraising Counsel's website (www.aafrc.org) features the "8 Steps to Choosing Fundraising Counsel." It may be downloaded.