

## Special Feature: Sacred Sites Workshop Peg Breen, President of Fundraising for Bricks and Mortar and More



Raising money is an ongoing necessity for Flanagan, fundraising most houses of worship. Though it may be advisable to hire a specialized for large campaigns, there is much that can be done at the grass-roots level by members of the congregation if they possess the necessary tools.

The Sacred Sites Program workshop "Fundraising for Bricks and Mortar and More," held this past spring at Marble Collegiate Church in New York City, was an energetic and enlightening day filled with valuable information and hands-on exercises.

Geared toward capital campaigns with goals of \$20,000 to \$50,000 dollars, the workshop was conducted by Joan Flanagan, a nationally recognized fundraising consultant, author, and teacher.

The workshop demystified the process of raising money, and empowered participants by providing them with useful tools and strategies for success. Ms. Flanagan's infectious spirit and enthusiasm left many attendees feeling confident that they could indeed reach their fundraising goals.

Drawing from her two books, *Successful Fundraising: A Complete Handbook for Volunteers and Professionals* and *The Grass Roots Fundraising Book*, as well as a folio filled with handouts, articles, and resources, Ms. Flanagan balanced the day between her lively presentation filled with real-life examples, group exercises, and breaks which encouraged participants to talk and share experiences.

### Stewardship vs. Fundraising

One of the first points Ms. Flanagan addressed is the difference between stewardship and fundraising -- important concepts with significant distinctions. For example, fundraising typically is conducted on an as-needed basis with a specific dollar goal, while stewardship is the on going process of meeting the annual operating budget. Everyone in the congregation contributes in the spirit of stewardship, whereas fundraising often involves larger gifts from people or firms who may be from outside the congregation.

The surrounding community is an important place to start when planning a capital campaign. Good prospects include: the non-members who check the time on your steeple clock every day; the hosts and guests of meetings in your parish hall; and local businesses who might see a contribution as a way to endear themselves to your constituency and assert solidarity within the community.

While there are many ways to raise money such as special events and tag sales, the workshop taught people the critical skills required to effectively ask for funds directly from individuals and institutions.

This kind of direct appeal has the potential to be extremely effective, but for many of us might be a little intimidating and is therefore often overlooked as a way to raise money. Ms. Flanagan broke the process down into critical and sensible steps, and made it entirely user-friendly.

She sums up her basic rules as follows:

1. Have the courage of your convictions.
2. Ask for money.
3. Send thank you notes to your donors.
4. Ask other people to ask for money.
5. Send thank you notes to your fundraisers.
6. Have the courage of your convictions.

### Making the Case

What does it mean to have the courage of your convictions? Luckily, your congregation is unified by faith and commitment and the conviction is implicit. Having a clear grasp of your capital project helps you articulate your conviction to others. Thus the first group exercise Ms. Flanagan facilitated in the workshop was entitled, "Making the Case for your Campaign."

In order to successfully make the case and inspire others, it is crucial that you learn everything you possibly can about your project. And be sure the project really reflects the best interests of your congregation and the building itself -- it's important to understand the "big picture."

The big picture is why the Sacred Sites Program encourages congregations to undertake conditions surveys of their buildings. A conditions survey conducted by a qualified preservation architect or conservator provides an objective overview of your building's conditions, a prioritized list of its needs, and the estimated costs. Without it, you won't be sure how much money needs to be raised.

The congregation can then take a proactive approach and plan the next five to ten years of capital campaigns accordingly. For example: this year we must apply a new roof; next year the building needs to be repointed; and so on.

Assembling documentation regarding your building's historical significance can also provide tools for making the case and help foster a sense of stewardship within the congregation. Let's say your 100-year-old slate roof is reaching the end of its useful life. It must be replaced in order to prevent water infiltration and damage.

Although it would initially be cheaper to re-roof with asphalt shingles, it would dramatically compromise the historical integrity of your structure; radically alter the appearance; and may not be permissible under certain local and national landmarks preservation guidelines. Plus, asphalt would require replacement within 20 to 30 years.

To raise the funds to apply a new slate roof would be a tall order -- however it would also protect the aesthetic and historic integrity of your building for future generations of congregants and for the larger community. And slate wouldn't need to be re-applied for another 100 or more years, so it even makes good economic sense over the long term.

Understanding the big picture, therefore, helps define your needs and convey the conviction you and your fellow fundraisers have. It lends credibility to your campaign, and gives those you ask for money confidence in your project.

Other questions to address when making the case to potential donors include: why is it a worthy investment; what are the tangible and intangible benefits of supporting it?

Ms. Flanagan didn't just lecture, she trained. Participants broke into small groups and practiced "making the case" with a real project, brainstorming and role-playing as a team. A similar exercise with your committee might help coalesce diverse opinions.

#### Show Us the Money!

Once you and your committee have "made the case" for your campaign, it's time to get out there and ask.

The fundraising committee must be made-up of individuals who are willing to ask for money -- this is when having the courage of your convictions can help overcome any bashfulness and enable you to make a great case for your project. Have the committee make lists of individuals whom they personally can ask for donations utilizing the following guide:

- \* Name ten people you can ask to donate \$20.
- \* Name three people you can ask to donate \$200.
- \* Name one person or institution you can ask to donate \$2,000.

Based on the above, each member of your committee can conceivably raise \$2,800. If you have ten committee members, you've already raised \$28,000!

The people who contribute believe in your project and therefore might be willing to work with the committee and make a personal appeal to others. Be creative in assigning value to specific aspects of your project. This can be a useful marketing tool and will help donors feel a sense of connection. For example, determine how many slates or lengths of copper gutter a \$100 dollar contribution will buy. This is especially useful when your capital project is not particularly glamorous. It is always easier to fundraise for projects which are beautiful and visible such as stained glass window restoration, for example, than for a new gutter system.

Design innovative ways to acknowledge gifts for these less visible projects as well. This leads us to a point Ms. Flanagan stressed as critical -- saying "thank you" to the donors and the askers, in a timely and gracious way.

In terms of the nitty-gritty -- how exactly to ask -- Ms. Flanagan has broken the process down into three steps:

1. Make a gift yourself.
2. Make the pitch (drawn from the work you've done making the case for your campaign).
3. Close the deal. This is key.

Ms. Flanagan recommends the following steps: ask for a specific dollar amount; explain why you need the money now; briefly answer any questions; ask for the dollar amount again; stop talking and keep smiling. She suggests repeating these steps at least three times, always ending with a request for a specific dollar amount.

#### Ask Whom?

How do you know whom to ask? As mentioned above, approach local businesses and corporations first. General guidelines for determining the best individual prospects are as follows:

\* Members of your congregation and other congregations, groups, or tenants who share your space

\* Members of any religious congregation (Ms. Flanagan notes that individuals who regularly attend religious services typically give more of their household income to charities than people who aren't part of a congregation.)

\* Volunteers

\* Voters People who have asked you to donate to their own special causes are good prospects too. Ms. Flanagan emphasized that the most important thing to keep in mind is “even the BEST prospects have to be asked.” To help determine whom to ask, Ms. Flanagan created the ABC’s of identifying major donor prospects, and notes that commitment to your cause is more important than wealth.

A strong donor prospect:

- \* Has the ability to make a large gift.
- \* Believes in the mission of the organization.
- \* Can be contacted by one of your fundraisers.

It is important to know that the majority of donations to your cause will come from private individuals. For religious properties especially, foundation grant money, if available at all, will typically only account for a small percentage of any fundraising campaign. The basic lesson is to identify individuals to ask and ask often. Conclusion Successful fundraising involves tenacity, defined goals, and a clear and organized mission. Joan Flanagan also points out that giving people the opportunity to contribute to your capital campaign provides those donors with the priceless gift of self-esteem.