

## Choosing and using a Fundraising Consultant

The following article is based on a presentation given by Gordon Duggins at "Voices of Experience: Fundraising for Religious Properties," a fundraising workshop sponsored by the Institute for Sacred Sites of the New York Landmarks Conservancy at General Theological Seminary on October 9, 1991, and is reprinted below with his permission.

My experience as a professional fundraising consultant to a wide variety of religious institutions has led me to develop a series of assumptions about capital campaigns for religious institutions.

Assumption 1: counsel is here to stay. Fundraising counsel has been around since the turn of the century and it has proven its usefulness time and time again in a variety of settings and under various economic conditions and circumstances.

Assumption 2: Choosing a fundraising counsel is the most important decision a congregation will make during the course of a capital campaign. Your counsel, whether it be a national firm or a smaller one or two person firm, will be/should be by your side, with advice, direction, and evaluation, for every step of the campaign, from the initial feasibility study and research on prospects to the final wrap-up of the campaign. Make the right choice, and it is indeed a match made in heaven. Make the wrong choice, and you may live to regret it.

Assumption 3: Fundraising counsel can be of great assistance to a congregation of any size. Fundraising counsel can make technical assistance and production services available that would be too expensive for most congregations to duplicate on their own and can also provide a broad spectrum of training skills and methods that are not generally available in most churches or synagogues. Seasoned fundraising consultants can also bring their experience with other congregations and religious organizations to bear on your own campaign.

Assumption 4: Clear expectations for the religious organization and for the fundraising counsel are critical to the success of the campaign. The fundraising consultant's enthusiasm and commitment to the project are often among the most important determining factors in a successful campaign. A high percentage of all fundraising consultants are competent. However, the "chemistry" between leadership of a congregation and fundraising counsel is often more crucial to the success of a campaign than the absolute level of competence of a particular fundraising consultant.

### Choosing a Fundraising Consultant

Finding the right consultant can be a difficult task. Religious leaders in your area who have recently completed campaigns can be an invaluable Source of referrals, as can the regional stewardship office of your particular denomination. Lists of consultants are readily available in the collection of periodicals and other sources at the Foundation Center in New York City. [See the Technical Services and Helpful Publications columns for more fundraising information on The Foundation Center.] Most fundraising consultants will be pleased to speak with you by phone to discuss your campaign at no cost.

In order for the relationship between a fundraising consultant and client to be Successful, both parties must adhere to certain standards.

Standard 1. Be Up Front. As a client you should be "up front" about your organization. How much money has your church or synagogue raised over the past five years? What condition are your records in? Do you have a clean, up-to-date mailing list that can easily be transferred to a computer data disk, or do you have names scribbled on several lists in an old shoebox? Are there skeletons in your closet? Are there scandals within the past ten years that could hinder a campaign? Be honest and open with yourselves. Almost any situation can be neutralized if known in advance.

To give an example, a few years ago I served as consultant to a \$2 million parish campaign in the southern United States. Mid-way through work with potential major donors, I discovered that the rector had been implicated in his wife's tragic death several years previously and, though he had been cleared of any wrongdoing, many parishioners suspected their rector of murder! Fortunately, we were able to deal with this alarming revelation (although I lost a month's worth of sleep) and the campaign succeeded in raising \$1.9 million. However, it did require a change in tactics in "mid-stream." The campaign would have been far easier to plan if this issue, as painful as it was it had been disclosed during the planning stages.

The fundraising consultant also needs to be forthright about his or her services and experience. Track records are important, but it is also important for a consultant to discuss the total range of services that he or she can offer and the general schedule or design of the campaign. If your questions are direct, specific, and show interest in the consultant's services, then you should expect direct and honest answers from the consultant. "Boilerplate" proposals from a prospective consultant will not help you evaluate his or her enthusiasm for your particular project or his or her ability to spark enthusiasm and commitment in potential donors.

Bear in mind that initial conversations are meant to help both clients and potential consultants get to know one another and determine if they will work well together. It is not appropriate at this stage of the game for potential clients to try to collect free advice, nor is it appropriate for potential consultants to do a "hard sell" or "snow job." If all parties are forthright and open, both the client and the consultant have a better chance of making wise decisions.

Standard 2. Get References. The client should carefully check the fundraising counsel's references. Ask previous clients about the potential consultant's interpersonal skills, creativity, and strategic planning abilities. Also inquire about the consultant's sincerity, perceptibility, and adaptability in challenging situations.

If the religious organization is in New York State, the potential client can also call the New York State Office of Charities Registration at (518) 474-3820 for information about a consultant's registration and any complaints filed by previous clients. All fundraising counsel and fundraisers must be registered with the State in order to operate in New York State.

Standard 3. Write a clear letter of agreement or contract. The best letters of agreement detail the areas of responsibility for the consultant and the client. The letter of agreement should also detail the financial arrangements, the period of the partnership, and how it can be terminated at anytime by the client. Both parties should be clear in the letter of agreement about reimbursable and their total allowable costs. Most letters of agreement do not bind either the consultant or client to tight, rigid schedules.

Standard 4. Have Confidence in One Another. In order for a fundraising consultant to be successful, the consultant and the client need to have confidence in each other. This is why the proper "chemistry" is so important. It does no good to pay for a consultant's services if you do not trust the consultant enough to follow through on his or her advice.

#### Using a Fundraising Consultant

When the right consultant has been chosen, a religious organization needs to use that consultant properly. The consultant needs to be incorporated into the religious organization and its campaign. Fundraising counsel can inject a great deal of vitality into an organization as a campaign is being contemplated and designed. In particular, fundraising counsel can offer the following strengths to a religious organization embarking on a restoration or renovation campaign:

1. A fundraising consultant can introduce a level of professionalism and administrative sophistication to a religious institution that will have a positive impact not only on the campaign but also the church or synagogue's overall operation.
2. A fundraising, consultant can bring a network of funding sources and preservation professionals to an organization and help an organization discover new constituencies and uncover. Hidden connections between the organization and its members and potential resources Fundraising counsel can often help the organization's leadership, see financial possibilities that have previously gone unrecognized.
3. A fundraising, consultant can bring a sense of urgency to an emerging campaign,
4. A fundraising consultant can bring a sense of confidence to church leaders embarking on done campaigns. Counsel, if experienced, has one all this before.
5. A fundraising, consultant can help maintain sanity in your institution's office. Because most, fundraising consultants work off-site I using. Their own staff, a fundraising consultant can operate independently of your limited office resources, thus freeing up the institution's staff for the day to day operation of the church or synagogue.
6. Finally, a fundraising, consultant can help focus organizations attention on the "bottom, line." Dollars pledged and given during a campaign are important to meeting the. Client's needs, but this "bottom line" focus is not limited to the final results. The consultant's bottom line attention can also enable an organization to adjust the direction of the campaign or the methods being used I to raise money at the first sip of difficulty.

In conclusion, the relationship between a client and fundraising counsel is really a co-venture in fundraising. The process of selecting a consultant and incorporating him or her into the life of the institution is key to developing the best possible relationship. Fundraising counsel provides a special service to a congregation for a specific period of time for a special project. Historic religious properties are indeed special gifts to any religious organization and the surrounding community. A good fundraising consultant can help religious organizations in their stewardship of that gift.

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