



Ask & Receive

Raising Funds and Friends for Campus Ministry

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April, 2011

An Initiative of the Ecumenical Campus Ministry Team

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- ◆ The Evangelical Lutheran Church in America
- ◆ The United Church of Christ
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MAKING THE CASE FOR THE ASK

The day has finally come; that all-important meeting with your most promising donor is underway. You're sitting comfortably (or maybe not) at the dining table with your board chair, ready to ask for a major gift for your ministry. Here's the crucial moment—when the prospective donor turns to you and wants to know why a gift now to the ministry is so important. How you respond may save or sink your vision. Have you done the necessary preparation? Are you prepared to answer with a case that is urgent, relevant, and convincing? Let's look back at what you did, or should have done, to make this a successful moment in time.

Deciding on the “case” for the ministry is both a process and a statement. It begins with focused conversation about the core values of the ministry. It works its way into a cogent mission statement about who you are as an organization and a vision of what you want to accomplish. This may take months to accomplish, a lot of hard head work, and some very careful writing. What you and your leadership are trying to do is make a case for why your ministry should be supported, what sets it off from other similar organizations, and why the need is now so critical. What you end up with, at the end of this collaborative process, is a case statement that will come to life in some sort of print or visual media. It will give voice to the answer you give to your prospective donor. While the donor may have specific questions or concerns, the case statement will serve as a concise representation of the vision of the ministry and the plans to accomplish it. It is no less than the anticipated answers to the generic questions of “why, who, what, how, when, where, and how much.”

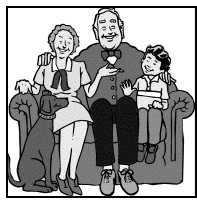
The case statement has both “internal” and an “external” purposes. Internally it serves as a unifying process and document for the ministry leadership. Here the gloves can come off and everyone gets a chance to participate in developing the case. The final draft is usually written by one person after candid input from all concerned. Once that is done, the board speaks with a united voice in presenting the case to the external community—donors, constituents, and supporters of all persuasions.

The case statement is usually 2-4 pages long and includes the following:

- ◆ The mission statement
- ◆ The vision for the ministry and the objectives planned to reach the goal
- ◆ The crucial programs and services
- ◆ The governance and accountability structures
- ◆ The staffing and implementation plan
- ◆ An up-to-date financial statement
- ◆ The plan for evaluation
- ◆ A brief history of the ministry
- ◆ Anecdotal material that adds urgency and life to the proposal, such as personal stories, relevant statistics, photographs, news stories, etc.

The case statement should be written or presented in such a way that anyone unfamiliar with the organization could become aware of your mission and purpose within 10 minutes. Sometimes, when a donor expresses the need to take more time to consider the appropriate gift, the case statement may be left behind as reference material. The final response from the donor will be both emotional and rational. The case statement should appeal to your donors at both levels.

RECEIVING WHAT A DONOR HAS TO OFFER



"The donor's motivations trump your rationale."

Jim Daniel, Bentz-Whaley Flessner

A wise fundraiser has said that you have to "listen the gift to its conclusion." While I don't remember where I first heard this sage advice, I am aware that I hear its echoes frequently in what I read and learn. The invitation to give a gift to your ministry is as much, if not more, about the potential donor than it is about your ministry's needs. As we build a base of friends for our campus ministries—a community of support that knows us and cares about us—the posture of listening will become increasingly important.

Listening, to be sure, is an art, even in the casual world of conversation. It is even more so in the world of fundraising, where the most significant thing you can do is attentively listen to a donor's heart. Certainly your ministry has "needs," but so do donors. They have needs to find fulfillment, make a difference, invest carefully in what they believe in, honor a loved one, affirm their values, or help to resolve a human problem.

In a good listening conversation several things happen. There is permission to speak from the heart. There is time to hear about personal experiences and how those experiences have shaped a person's life. There is time to respond to deep questions. There is trust building and truth sharing. The visitor may often find him/herself saying, "Tell me more, or share some more of that dream with me."

Another fundraising bit of wisdom is that "it takes as many visits as there are zeros in the ask." This means that a lot of time initially is spent in a listening mode—not pushing your vision or your needs, but calmly and genuinely hearing the heart of the donor. Good fundraisers finally make a solid connection between the needs of the donor and the needs of the ministry, because they have spent quality time listening. Pay attention, because attention pays.

If the potential donor is not well-acquainted with your ministry and the purpose of your visit, you may want to make the first conversation a discovery visit. At this point you are not seeking a specific gift; you should make that clear to the person prior to the interview. The purpose is to get to know the person better and invite them to tell you about themselves, their interests, and their current gift priorities. This understood, the pressure is off and both you and the interviewee can relax and have good conversation.

Some sample questions might be:

- ◆ Would you share with me something about your family and what's important to you as a family?
- ◆ Can you tell me about your work (and that of your spouse)?
- ◆ What gives you joy?
- ◆ How are you connected (to the church, the university, our ministry, etc)?
- ◆ What are some things you think a ministry such as ours should be doing?
- ◆ What organizations or causes do you and your family support and why?
- ◆ What kinds of community activities are you involved in? Do you do any kind of ongoing volunteer work?
- ◆ What is your level of confidence in our organization?
- ◆ What would you like to know about our ministry in greater depth?
- ◆ If money were no object, what would you like to accomplish?

The purpose of a discovery or cultivation visit is to understand the donor and his/her motivations and to move them to a deeper level of awareness and readiness to give. The solicitation visit, finally, is to get the invitation on the table and negotiate the gift. This last step will be so much easier if you have spent quality time listening and responding to the heart and needs of the donor.

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Stated differently, there are seven ways that a case statement can be used.¹

1. It develops agreement, understanding, and commitment among leadership and staff.
2. It provides a strategic direction for and an urgent witness for the purpose of the ministry.
3. It demonstrates how your organization will endeavor to accomplish all that you are bold enough to dream.
4. It enlists friends and new supporters to the cause in sufficient numbers and at the proper level to accomplish the cause.
5. It is an early working document and cultivation piece for potential major donors, particularly if

they are involved in setting the final draft and so become engaged in the project from the outset.

6. It helps others endorse and share your vision. If presented in a lively, compelling way, it becomes a spark that ignites a blazing fire.
7. Once you describe the dream, the case statement becomes the source book and guide for writing such related things as newsletter articles, grant proposals, news releases, and marketing materials.

Hard work and careful planning of the case statement will make your ongoing efforts considerably easier. You will know what you are talking about when your donors ask those crucial questions, and you will sound like it, too.

¹Developed from material in *Making the Case*, Jerry Panas, Institutions Press, Chicago, 2003

FUNDRAISING/BOARD DEVELOPMENT SEMINARS ON THE HORIZON

The Ecumenical Campus Ministry Team is sponsoring a continuing series of seminars on fundraising and board development across the country this spring. The seminars are open to all campus ministry leadership, including staff, board members, denominational representatives, and student leaders. There is no cost for the seminars, except for the cost of travel to the location. Contact the coordinators listed below for more information about these future seminars.

- ♦ May 14, 2001 in Chicago, Illinois
Brent House at the University of Chicago
Coordinator: Stacy Alan stacyalan@brenthouse.org
- ♦ May 21, 2010 in Ft. Collins, Colorado
Lutheran Campus Center at Colorado State University
Coordinator: Connie Winter-Eulberg lcmsu@lamar.colostate.edu

Five successful seminars are already completed: Columbus, Charlotte, Palo Alto, University Park, PA, and the Houston area. More seminars are in the planning stages and will be held in the coming months, time and budget permitting. For more information about seminars or for general resources, please contact the Rev. Galen Hora, ECMT consultant at ecmtconsultant@hotmail.com

ABOUT THIS NEWSLETTER

Ask & Receive is a newsletter designed to supplement the Fund Raising Initiative of the Ecumenical Campus Ministries Team. It presents a series of ideas and resources on a monthly basis to address the challenges of fund raising and board development, focused on the particular context of campus ministry. Each issue deals with an aspect of fund raising, such as the annual appeal, visiting donors, trends, or tuning up the board.

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One of the most neglected and sensitive of all board evaluation duties is the assessment of its own performance.

BOARD/COMMITTEE EVALUATION

I remember reading a few years ago about an elderly couple from the Midwest who left home to travel to a nearby town. Shortly after starting out, they became disoriented, but they kept on driving. They stopped for an occasional meal and to refill the gas tank. They slept by the side of the road. They did not stop to ask for help or directions. They were sure that if they just kept driving they would arrive at their destination sooner or later. It was a sad story.

I suspect that many reading this article have felt the same way relative to their journey as a board or committee member. The trip started innocently enough. You were just going to the next town—the work of the board was fairly routine. Good people could figure it out. Just keep on meeting and you would arrive sooner or later with your goals met and your vision realized. Right? Probably not!

Board evaluation is important because the work of the board is important. In the long run, the board mirrors the organization. When board members get frustrated because of ill-defined goals, lax accountability, poor participation, etc., board morale takes a nose-dive, attendance falters, and the general spirit of cooperation and motivation wanes. An effective board/committee addresses issues head on, keeps the mission clear, uses financial resources wisely, and makes meetings enjoyable and important.

Certainly one critical time to evaluate board functioning is at the annual meeting or board retreat. Another time, however, is to build in 5 minutes at the end of each meeting to ask the question: “how did we do/what could we do better?” It’s like a trip from New York to Los Angeles—better to make corrections while you’re still in New Jersey than when you find yourselves in rural Iowa.

Some boards/committees find it useful to invite an outside consultant to lead them through an evaluation and share perceptions and suggestions candidly with them.

Many boards find it helpful to use an evaluation tool or questionnaire. This is especially useful if it is designed a year in advance, so that members know the standards by which they will evaluate themselves. Here is an example of such a tool. Using 3 as high and 1 as low, place a number after each statement.

- ◆ The roles of staff and board are well defined and respected. ____
- ◆ The board has a visioning and strategic planning process in place. ____
- ◆ There is a board job description and incoming members read it and affirm it. ____
- ◆ The board sets fundraising goals and each member contributes appropriately. ____
- ◆ The nominating process carefully mentors diversity of cultures and gifts. ____
- ◆ Board members receive orientation and mentoring. ____
- ◆ The board regularly reviews the bylaws and policy documents. ____
- ◆ There is a process for handling emergency matters. ____
- ◆ There is an annual schedule of meetings and an attendance policy is followed. ____
- ◆ Meetings have written agendas and materials are distributed prior to meetings. ____
- ◆ There is a process for managing conflict. ____
- ◆ An audit or financial review takes place annually. ____
- ◆ The board monitors accurate reporting of programs and financial resources. ____
- ◆ The board has personnel policies and regularly reviews staff performance. ____
- ◆ Time is taken regularly to understand campus issues and student concerns. ____
- ◆ Experiences and skills of board members match the current needs of the ministry. ____
- ◆ The board actively interprets the ministry to congregations and the wider community. ____

No external entity requires or pressures a board to engage in evaluation. Few board members have experience doing it and some shy away because evaluating peers is hard. However, along with other urgent business, good boards attend to their own well being. It’s a vital component of exercising healthy leadership. If you feel lost, don’t just keep driving. Stop and ask for directions. Look for help. Your service on the board will be more enjoyable and your ministry will be stronger for it.