

Fourteen Steps to Effective Fund Raising for Pastors

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None of us really like the thought of asking for money. For some of us, it feels like we are creating an imposition, cultivating guilt, or admitting an institutional weakness. But, none of us should feel badly about asking our friends and church members to step up to a real human need. Sharing the wealth that God has given to us is rock solid basic to the path of Christian Discipleship. We are not called by God to a faith of singularity but of community. This is a consistent teaching of the Bible from Genesis to Revelations! With that in mind, here are some principles that have guided me in fund raising for over 50 years.

1. **Start out with a positive attitude.** If you don't personally believe that what you are asking folks to support is important – then don't go there. Adam Hamilton once said something that has become axiomatic for me. "The energy you give out to your congregation is the energy that you get back." Or something like that.
2. **Yes, you do have to actually ask!** This can be from the pulpit, in written letters to the congregation and/or in person. An old axiom in fundraising is that "If you never ask – then you know exactly how much you will receive." A gentle and sincere face to face request is the most effective way to make a request.
3. **Third Party Rule.** People give to causes in which they believe through people they trust. If you plan to ask for a significant gift then do some planning about how you are going to ask the prospective donor. In short, if you know a willing person who is a personal friend with the donor, then see if that third party will accompany you on the visit.
4. **Always let the donor know why you are asking for the appointment.** "We are planning to try to raise a significant gift from our Church to a United Methodist effort we call Imagine No Malaria and I would love the opportunity to come visit with you about this." Larger donors appreciate a heads up and generally do not respond well to an "ambush visit."
5. **The all-important case statement.** The case statement is a very simple document. It clearly and simply answers the question from the donor, "What are you going to do with my money?"
6. **Give folks plenty of lead time.** Congregations have to have time to let a need "sink in." They have been living with the old worn out sanctuary, for example, for a very long time. Members see it as a "new" space – 30 years ago. New visitors to your church see it as an "old" space and kind of tired the moment they walk through the door.
7. **Remember the "80/20" rule.** In almost every volunteer organization about 20 percent of the members will give about 80 percent of the long term support. About 80 percent (more or less)

will provide only a minimum level of financial support. Your support in a capital campaign will still come from the 20 percent! They need to be fully considered and involved.

8. **Major donors need more lead time.** People who are both able and willing to give larger donations to charitable causes often work out their giving (especially larger gifts) with their financial advisors years in advance. Their giving is part of their overall family wealth management program, often handled by professional financial advisors. When you ask for their commitment, remember that it may take a longer period of time to come to fruition.
9. **The “two Pocket” rule.** In our culture, donors make contributions most often in one or both of two ways. First, the give from their ordinary income. Most of us give this way to our Church – from our checking account as part of our regular monthly budgeting. In larger campaigns for specific purposes many people will give from their assets or investments. This “pocket” of funds may be appreciated stocks, retirement savings, insurance policies or even bequests. Do not overlook these longer-term gifts in your donor solicitations.
10. **The Donor as Customer.** People are becoming more and more selective and intentional in their charitable giving. It is not always true any longer that people give out of a sense of duty, responsibility or habit/conviction. In the back of many minds, donors are now asking the question, “what am I buying with this gift?” Be prepared to be specific and let your donors know why this is important and what the tangibles are being achieved through their donations.
11. **Present opportunities for donor advantage gifts.** More and more, the charitable giving world is being provided with tax-advantaged or income producing gifts for larger commitments. Things like Gift Annuities, Lead Trusts, Donor Advised Funds and bequests are giving donors the chance to help themselves (or others) while simultaneously helping their favorite charities. Know and use these planned giving tools.
12. **Thank you.** Did I mention Thank You? Say Thank You! Again, thank you! One more time, thank you! People give because they know that their gift is appreciated – so be frequent and generous with “Thank You.” A lot. Thank You. THANK YOU !!!
13. **The Ripple Effect.** A specific fund raising effort is like a pebble dropped into a pond. The leader has to step up and make his/her commitment. Then you move to the “lead” givers and make their support know. Following that the “inner circle” (often a church council or campaign committee) makes their contributions. Finally, it spreads to the whole organization/congregation and the ripple moves across the pond. Be systematic and intentional and watch your success grow.
14. **Good Cop Bad Cop.** The rule is simple – those who see the need and call people to give to an extraordinary effort are the villains going in and the heroes coming out. Nobody likes the idea of asking or being asked for money. But in the end everyone celebrates together when the moment is won. Suck it up.....and do the job. And THANK YOU!!