Ask & Receive

Raising Funds and Friends for Campus Ministry

Ask & Receive October, 2011

PREPARING FOR THE FALL APPEAL

Americans receive over 125 billion pieces of solicitation mail each year, up 15 percent from five years ago. In the minds of a lot of people, that's a lot of junk! How do you craft your annual appeal so that it doesn't fall into that category and join other nuisance mail in the round file?

It is well-documented that the best time of the year to appeal to your donor friends for support is early November through the end of December. It's the season when gift-giving is on everyone's minds. It's also the season to think about tax deductions. Unfortunately, it's also the time when every other organization is asking for donations and, if you're late to the table or are less than thoughtful about your appeal, you may be eating leftovers. So what are some cogent things to consider as you prepare your fall appeal.

The first thing to think about in preparing your fall appeal is your constituency. Who are the real friends of your ministry? Why are they on your database? Have they given before? How much and how often? The reason for doing this is to exercise some judgment about how you will communicate with the various levels of friends. Some are strong supporters and will need little encouragement to continue to give. Others are less inclined and will need more personal attention or more convincing stories and information. Think about how you can best communicate with each segment—letter, phone call, newsletter, etc. Plan to "get the gift, continue the gift, and increase the gift," as the "Moves Management" style suggests.

Second, build a budget for your appeal. Actually, this should have been done a while back when you developed your annual budget. Then you would have considered how many times a year you will want to communicate with your donors and how much each method of contact will cost. It's courting trouble to try to conduct a once-a-year campaign to people who you don't know with the hope that the income will at least cover the cost of the mailing. (Yes, it's often the case!) Are you going to send a newsletter and a cover letter together in one envelope? Are you going to send these pieces separately? Will you enclose an addressed return envelope with a response card designating gift categories? Will you send first class or bulk rate (always first class to regular donors)? Does your mailing look appealing and worth opening? Would you be pleased to show it to others or are you just "glad that's done?"

Most organizations today are in touch with their donors at least four times a year, six if the budget will allow, using a mixture of letters, news pieces and electronic communication. A four-color newsletter with several pictures of decent size and clarity usually will be read upon receipt. Anything longer will be laid aside, then forgotten, alas. Do you expect that people are eager to read your communication?

The core of the message needs to spell out in personal terms why the individual reading this letter should consider a gift to your organization. Why your ministry? Why now? Why me? You are trying to connect the values of the donor with the mission of your ministry, and do it in a way that is urgent, relevant, and personal. Your goals must be achievable. Your vision should lift their eyes and their spirits. Take if for a "test drive." Ask some donors to read it and give you feedback. Does your cause empower people to make a difference? Are you trustworthy as an organization; can donors safely make an investment in what you are doing?

An Initiative of the Ecumenical Campus Ministry Team

- The Episcopal Church
- The Evangelical Lutheran Church in America
- The United Church of Christ
- The Christian Church (Disciples of Christ)
- The United Methodist Church
- The Presbyterian Church (USA)

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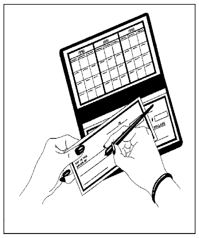
GIFT ACCEPTANCE POLICIES



"Decisions based on case-by-case scenarios breed inconsistency. . . . The glittering appeal of the potential gift obfuscates good judgment."

Kathryn W. Miree

Always look a "gift horse" in the mouth—and give it an opportunity to return the favor.

While it may seem obvious to say that your ministry will accept any gift of any size and any time, in reality that's a bad policy because it's a non-policy. Standards need to be in place for both requesting and receiving gifts, stated in advance, and shared with potential donors. Donors need to know what kinds of gifts will be accepted and what will not be accepted, how the gift will be used and cared for, and who has control over making those decisions.

Gift policies prevent organizations from accepting inappropriate gifts or gifts that have "strings attached." They provide guidelines for volunteers and staff as they solicit gifts. They also provide for ways to make exceptions to the general rules that are above board and legal. The major segments of the policy document are:

- Mission and Purpose Statement, which is always stated upfront to determine a match between the intent of the donor and the goals of the organization.
- Purpose of the Guidelines, which defines the acceptance of gifts and provides guidance to donors in completing the gifts.
- Description of the Process for receiving certain gifts, such as real estate, insurance, stock, or cars.
- Use of Legal Counsel, which provides protection for both the donor and the charity.

There may be sections dealing with such specific topics as matching gifts, restricted/unrestricted gifts, endowment parameters, pledges, in-kind contributions, use of credit cards and online gifts, named funds, and the use of planned gift instruments, such as annuities.

Finally, policy decisions need to be stated about the ethics or conduct of personnel, confidentiality, use of constituent lists, and protection of the donor's interests.

Effective 1994, the Omnibus Budget Reconciliation Act (OBRA) added Internal Revenue Code section 170(f)(8) which denies donors a charitable deduction for any contribution over $250 unless the donor received a written acknowledgement of the contribution from the charity. Acknowledgement correspondence must include: (1) organization's name, (2) amount of each contribution, (3) description (but not value) of non-cash contributions, (4) statement that no goods or services were provided by the organization, if that is the case. (5) description and good faith estimate of the value of goods and services, if any, that were provided in return for a contribution; and (6) statement of which goods and services, if any, provided in return for the contribution consisted entirely of intangible benefits.

Gift acceptance policy documents need to be prepared early on in a campaign or annual fund drive. While they may be written by one knowledgeable person, or even edited from another source, they must be reviewed by the board and voted on at a regular board meeting. They should be reviewed annually.

Once the policies are written, they may be provided to potential donors in hard copy at the point when specific gifts are being considered. The policies should also be placed on the organization's Website as evidence to the general public that careful thought has been given to appropriate care of donations.

Sample copies of gift acceptance policies can be found online at *www.boardsource.org* or *www.cdrfg.com/modeldocuments* When using a boilerplate document, be sure to revise it to fit your local circumstances and intentions. Local non-profit organizations may choose to share their policies with you and describe how they are used in greater detail. Be sure to engage legal counsel as appropriate.

GIVING TRENDS

Over the past several years, major attention has been given to the importance of women in philanthropy. It has long been acknowledged that in the end the final decisions about the estate are made by the final survivors who are most often women. While during a couple's lifetime the husband traditionally may have had more say about how gifts are distributed, it usually falls to the wife to ultimately leave the legacy where she alone chooses it to go. Changes are on the horizon, however, not necessarily because men are living longer, but because women are entering the decision-making earlier in the process.

A recent study by the Indiana School of Philanthropy at Indiana University[1] indicates that at higher income levels, women give more than men. Among people with incomes of more than $100,000, women averaged $4,223 compared with $3,904 for men. Also telling is that 85.6 percent of women give, compared to 80.7 percent of men. Women are catching up to men in compensation (although still near equal) and have the discretion to contribute to causes they feel committed to personally, regardless of how the man in their life might feel. While men are more likely to give to make their community a better place and to provide services the government can't or won't provide, women give because they understand that those who have more should help those with less. Debra Mesch, Director of the Women's Philanthropy Institute at the Indiana School, states, "Women are not a niche audience, they are the audience. . . . I think that charities are going to have to wake up and see that if you want to reach men, you have to go to the women first, because women often make the decisions in the household, including the giving decisions." This is not to denigrate the philanthropic impact of men; it is to place women on an equal level of importance.

Nearly a decade ago Martha Taylor and Sondra Shaw-Hardy, pioneers in the women-in-philanthropy movement, lifted up a major study of 400 women donors by Dr. Jane Wayland of Eastern Illinois University.[2] They pointed to significant findings of the study, which they called the "Six Cs" that motivate women to give: Create, Change, Connect, Commit, Collaborate, and Celebrate. While these reasons are often motivators for men too, what is important to recognize is the relational focus of women and their willingness to give to those causes to which they feel connected. Studies show that this is also true for newer donors under 30, both men and women. This new cohort needs to connect *before* they give. Belonging shapes the gift. Websites, newsletters, and personal communication need to see the playing field leveling and recognize the impact that can and will be made by women and younger donors in the years to come.

[1]Reported in "He Gives, She Gives," *Philanthropy Matters*, 2008
[2]"Women Donors Revealed," *Contributions*, May-June, 2003

WORKSHOP APPLICATIONS INVITED

The Ecumenical Campus Ministry Team invites campus ministries across the country to apply to host a workshop on fund/friend raising and board development for both staff and board members. The cost of the training services are shared with the ECMT. Workshops will be held at various locations during the 2011-2012 academic year. Application forms are available on the ECMT Website at *www.higheredmin.org*

ABOUT THIS NEWSLETTER

Ask & Receive is a newsletter designed to supplement the Fund Raising Initiative of the Ecumenical Campus Ministry 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.

Ask & Receive is published on behalf of the Ecumenical Campus Ministry Team at 2358 151st Avenue NW, Andover, MN 55304. The editor is Galen Hora. Phone: 763-350-3898 E-mail: *ecmtconsultant@hotmail.com*

> "Raising money is nothing more than stating the case for an institution you love to people with the resources to support it. Board recruitment is nothing more than stating the case for an institution you love to people who will be prepared to do the same thing." Kelly Kleiman

BOARD MEMBERS ARE HUMAN TOO!

Recently the president of a board shared with a problem with an edge of hurt in his voice. A staff member had called the board "lazy," hoping to motivate them to take up more of the responsibility for shouldering ministry tasks. What happened instead was a deflating of the collective board ego, making members feel less appreciated and less effective than perhaps they already are.

This all-too-common collision of expectations and responsibilities happens more frequently these days for a number of reasons. Board members claim to live very busy lives and see the time they give to the ministry in competition with time required by family, employment, and personal relationships. Also, the demands of organizations seem to be expanding exponentially—the harder leadership works, the more demands seem to be increasing for important tasks like strategic planning, fundraising, communication, facility maintenance, and staffing realities.

More work, fewer dollars, less staff, and an increasingly complex campus environment are challenges to both board and staff that often lead to expressions of frustration and conflict. Before things escalate into demeaning comments and public blaming, what can ministry leadership do to make board service more meaningful and, frankly, more human?

First, it must be recognized that board members are volunteers who give of their precious time and resources to guide and sustain a ministry they believe in. They are on the board because they want to do all they can to accomplish the mission. They show up at meeting after meeting, read reports, ask for money, repair buildings, and share the story because they care about the ministry and the potential it has to change lives.

Second, members need to be thanked and supported frequently. Beyond what staff and church leadership might say, boards must find a way to create and maintain a culture of appreciation for work well done.

Third, meetings should address real concerns about present realities and possibilities. Decisions need to be made, something vital may be at stake, otherwise why show up. People want to know that because they took the time to weigh in on critical issues and shoulder their responsibilities, lives are being changed and the academic community is enriched.

Kelly Kleiman suggests that boards need to pay attention to the primary question of what is expected of members collectively and individually.[1] Kleiman sees board recruitment not as filling slots on a grid, but as inviting interested people to serve and then identifying the skills and abilities they have that match the needs of the organization. This means having a job description that will be useful in both recruiting and defining the ongoing board responsibilities. When these expectations are meshed with those of staff (who hopefully also have job descriptions), it will be easier to see areas of potential overlap and neglect.

Specifically, here are some ways that boards and committees can improve their work together.[2]

- Have a "consent agenda" that contains all of the reports and items that can be voted on *en bloc*. Distribute it prior to meetings for everyone to read, edit, and digest.
- Schedule meetings far in advance and, if possible, meet less frequently.
- Rotate responsibilities so that the same people don't always get "stuck" being the note-taker or the chair.
- Take some time at each meeting to focus on the mission and strategic plan.
- Learn something new or dig deeper into a critical issue. Invite persons outside the board to have conversation or lay out a concern related to campus life.
- Assign tasks and expect reports or actions. Mutual accountability gives everyone a sense of accomplishment, including staff.
- Provide mentors for new members and find ways to make them part of the group.
- Enjoy each other's presence. Share meals and fellowship regularly. Have some fun.
- Celebrate victories and genuinely say "thank you." It's the human thing to do.

[1] Kelly Kleiman, "Board Members Are Not Hypothetical Constructs," *Contributions,* October 17, 2011

[2] See also Andy Robinson, *Great Boards for Small Groups*, published by Emerson & Church