

To Hire or Not to Hire Fund Raising Counsel

For a
Capital Campaign
or
Debt Reduction Campaign

Four Options Available:

- 1) Hire outside consultant to perform residential campaign. Consultant would be present throughout the campaign and oversee the process of developing the case statement, writing many of the materials, training the volunteer solicitors, coordinating the meeting schedule, and keeping the pastor and leadership informed of the progress.
- 2) Hire outside consultant to perform non-residential campaign. Consultant would be present at milestone events throughout the campaign and would help to oversee the process of developing the case statement and write many of the materials. There would be training for volunteer solicitors and a schedule would be prepared which would also keep the pastor and leadership informed of the progress.
- 3) Hire outside consultant to perform direct mail campaign. These campaigns are done as direct mail solicitations and the consultant develops the materials and prepares them for mailing. There is a set schedule and the pastor and leadership are informed of the progress.
- 4) Parish conducts campaign using local parishioner resources with assistance from the Office of Stewardship Development in developing campaign materials and a campaign schedule. The majority of the work is done by committed parishioners and the information is gathered and reported at the parish meetings.

Hiring a Professional Fund-Raising Consultant

If parish leaders decide to hire a professional fund-raising consultant, the parish is encouraged to review the Office of Stewardship Development list of approved fund-raising firms. Fund-raising firms are placed on the diocesan list by meeting personally with the staff of the Office of Stewardship Development, and by signing the Rockford Diocese – Fund Raising Firm Agreement. Diocesan suggested fund-raising firms agree to:

- Promote creatively the concepts described in the Section, “Integration of Stewardship Themes” as a part of the Parish Campaign Case Statement and materials;
- Meet with and provide information to the Office of Stewardship Development about the firm’s methodology, fee structure and a list of references of past clients.
- Assign a qualified consultant that is either a Catholic in good standing, or a person who has demonstrated a positive attitude and experience in the Catholic environment;
- Communicate regularly with and send copies of the Feasibility Study, Progress Reports and Final Report to the Director of the Office of Stewardship Development;
- Observe the diocesan moratorium by not conducting the active solicitation phases of a parish capital campaign from the beginning of April to the end of August so that the Diocese can conduct its annual Diocesan Stewardship Appeal.
- Provide a written contract for services to be signed by either the pastor or, in the case of a contract for \$12,500 or more, the Bishop of Rockford, and by the firm.

Parishes may select other firms, which are not on the diocesan suggested list of fund-raising firms. If another firm is selected, that firm must sign the Rockford Diocese – Fund Raising Firm Agreement.

Pros and Cons of Hiring a Professional Fund Raising Counsel

Pros:

- Experienced in this type of activity. They go from one parish to the next, to the next.
- Firms that are around for a while have proven techniques; they do not have to reinvent the wheel each time.
- Principle: “Blame the consultant” when things go wrong.
- Common Wisdom: Expert from outside knows more and is given more respect than the expert inside.
- When a parish hires someone from the outside, the perception is:
 - parish leaders are serious about the project
 - project takes on the highest priority for the short term length of the project
 - consultant can speak about what is best to do, not always limited by land mines of the parish and the politically correct.
 - parish leaders generally follow the advice of counsel or risk losing a lot of money.

Cons:

- Expense of contract
- Under estimate of the length of contract
- Lack of experience – consultant just out of basic training – huge staff turn-over
- Leaders and consultant’s inability to communicate well
- Unrealistic expectations of the consultant by parish leaders

What to look for in the interview process?

- Do they provide residential or non-residential service?
- Do they have a firm grasp of what it means to work in a Catholic parish with your demographics? How much experience? Check out references.
- Fully understand their distinctive style and methodology and why they have adopted that style. Door to door vs. receptions; in church, mailings, etc.
- Feasibility study: What are their components? Cost? How many interviews? What are their end results? How helpful will they be with the writing of the Case Statement?
- How do they identify major donor prospects? Focus on their approaches in this area
- What kind of back up assistance do they provide? Graphic, video, letters?
- Flexibility – What happens if their Plan A does not work? What have they done?
- Failures – give a reference.
- How are they going to help you with the long-term stewardship education goal? How will they insure that Sunday Giving and Diocesan Stewardship will be encouraged?
- Personal chemistry - not just with account executive making presentation, but more importantly with the actual person that would be assigned to the campaign.
- Cost of contract – what does it include, what is additional? How much would a typical budget be for materials? Do they need their own secretary? Housing, transportation?

Services Provided by the Office of Stewardship Development

For Parishes choosing the Ordinary Income Method, the Director of Parish Stewardship is available to assist with the development of plans, schedules, witnesses and materials.

For Parishes choosing to conduct a Capital Campaign, parishes may contact the Office of Stewardship Development for consultation regarding these topics:

- Overview of a capital campaign;
- Pros/cons of conducting a capital campaign using parish volunteers vs. hiring a fund-raising consultant;
- Pros/cons of residential vs. non-residential consultants
- How to develop a case statement;
- Leadership roles

The Director of Planned Giving is available to assist with the marketing and completion of planned gifts in conjunction with the Capital Campaign.

All costs associated with implementing either the Ordinary Income or Capital Campaign Method will be borne by the parish.

The staff of the Office of Stewardship Development is available for consultation. If the capital or debt reduction campaign is for one times the parish ordinary income or less the Office of Stewardship Development may be able to assist in coordinating the campaign. Typically if the campaign is for more than one times the parish ordinary income, the Office of Stewardship Development staff does not conduct or direct parish volunteers in the accomplishment of the various phases of an actual parish capital campaign.