



BETA

**SRS** Coaching Guide™

SUPPORT RAISING SOLUTIONS

# Develop Your Coaching Strategy for a Fully Funded Ministry

## **SRS Coaching Guide**

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### **Beta Version:**

This printed or electronic copy of the SRS Coaching Guide was created for the 2018 Support Raising Leaders Conference. SRS will take in feedback from conference participants and SRS Network Members to refine this coaching guide for its final version in the summer of 2018. Though this will be a resource that will receive consistent improvements and additional appendix items over time.

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The SRS Coaching Guide is a resource for SRS Network Members. Permission is given to SRS Network Members and Support Raising Leaders Conference participants to utilize any of this content in the creation of their own support raising policy documents and materials.

### **Support Raising Solutions**

P.O. Box 3556

Fayetteville, AR 72702

[SupportRaisingSolutions.org](http://SupportRaisingSolutions.org)

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# Table of Contents

- Introduction ..... 4
- Building Your Team ..... 5
  - Support Raising Leadership Positions ..... 5
  - Three Roles of a Coach..... 8
- Outlines of Coaching Calls..... 9
  - Weekly Coaching Calls ..... 9
  - Monthly Recap Meeting ..... 10
  - Quarterly Progress Review..... 12
- Reporting Systems and Content ..... 13
  - Weekly Support Raising Report ..... 14
  - Monthly Recap Report ..... 15
  - Staff Financial Health Monthly Report..... 16
- Benchmarks..... 17
  - Setting Coaches Up For Success..... 17
  - Expectations of Activity and Monetary Benchmarks..... 19
- Warning System, Levels, and Response ..... 23
  - Warning System and Triggers ..... 23
  - Warning Levels and Responses..... 24
- Principles of Coaching..... 28
- Appendix: Job Descriptions..... 31
  - Support Raising Director ..... 31
  - Support Raising Coach ..... 32
  - Team Leaders..... 33
  - Encouragement Partner..... 34
  - Support Raiser..... 35

# Introduction

Culture, Infrastructure, Training, and Coaching. These are the four pillars that must be built up in order to support the fundraising efforts in an organization. In ministries whose staff raise their personal support, the mission and vision is contingent upon its members mobilizing the financial resources and building a team of partners who will enable them to serve in ministry. For years, Support Raising Solutions has called for ministries to provide more thorough training, which is essential to embed the biblical conviction, perspective and necessary skills before starting out. Training is vital, but it must be paired with quality coaching because all the up-front training in the world can easily be tossed aside when faced with reality. As soon as a support raiser faces rejection from family and friends, stumble in their first few appointments, or begin to run out of contacts, they can easily deviate from their training if not properly coached.

In other discussions of ministry, coaching would be called discipleship, which is more focused on obedience, application, and life-change, whereas training can primarily impart knowledge, conviction, and perspective. Just as ministries work on models and resources for discipleship, coaching in personal support raising is an area to develop into both an art and skill. It is often said that you can't lead someone where you have not been, and a common tenant of leadership is to never ask others to do what you're not willing to do yourself. The same goes in coaching - not everyone should be a coach, as a coach's effectiveness will be significantly hindered if he or she is not fully funded from personal support themselves. Some think that coaching can be a skill in and of itself, and you can coach people to do things you have not done yourself. But in the area of personal support raising, an area that is wrought with spiritual warfare and personal struggle, coaches must lead from experience, not just knowledge.

Support Raising Solutions has interviewed and researched dozens of Great Commission ministries to learn of their coaching practices. This SRS Coaching Guide attempts to outline how to develop a coaching strategy and system into your overall development strategy. We will list job descriptions, best practices, sample reports, benchmarks, and an overview of policies. This Coaching Guide is a working document that can help guide your efforts. What is not included is prescriptive, specific answers that a coach needs to have in order to effectively lead others. We will share areas where coaches can find answers, but we will attempt to keep this Coaching Guide as a concise outline of how to implement a coaching strategy in your ministry.

# Building Your Team

As with any team and organization, it's important to first understand the roles that are necessary to accomplish your goals. How many support raising coaches do you need to meet your needs? Whose responsibility is it to ensure your new staff get to full support quickly and efficiently? Whose responsibility is to ensure your active staff are staying at full support and receiving full paychecks?

It's easy for people to fall through the cracks in both small and large ministries, and many organizations do not understand that devoting the necessary personnel to support raising coaching has a direct effect on staff retention and a growing pool of new fully funded staff. No matter your size, any ministry can create and strengthen their coaching efforts over time. While we have described an ideal framework below, we recognize organizations may start out with only one person who is championing this effort. Even a one person or small team can take the framework in this document and apply it to their current efforts.

## Support Raising Leadership Positions

The various roles in support raising leadership are outlined below. See the Appendix for actual job descriptions.

### Encouragement Partner

**Summary:** An encouragement partner is a trusted friend of the support raiser who commits to regularly, prayerfully and intentionally keep a support raiser encouraged and motivated throughout the support raising season.

**Rationale:** "A friend loves at all times, and a brother is born for a time of adversity." Proverbs 17:17. Everyone raising support needs a trusted friend to lean upon for encouragement and prayer. This person is not a coach, as most people don't have personal friends experienced in support raising. This is a friend who can speak words of encouragement, offer a shoulder to cry on, pray with them, and also speak truth, give tough love and accountability when needed.

**Insights:** While SRS has always trained support raisers to have a personal accountability partner, this has sometimes led to the reliance on inexperienced friends and counselors giving poor advice and ineffective accountability. Coaching and accountability is best suited to someone on staff with the ministry who has experience to draw from. Some have expounded upon this role to create an advocate team that advocates on their behalf for gaining referrals, setting up appointments, and providing member care.

### Coaches

**Summary:** The support raising coach is the primary person responsible for guiding a staff member (new or veteran) through the support raising process. Success entails consistent and constructive assistance that trains, instructs and propels the staff toward character growth and becoming fully funded within the designated time frame, resulting in ministry placement. The coach employs a holistic strategy by simultaneously playing the role of shepherd, supervisor and skill mentor to effectively equip each staff member through this season of support raising and character development.

**Rationale:** Coaches should be qualified people who can give ongoing equipping, troubleshooting, accountability, as well as encouragement in personal support raising. They should be fully funded, experienced, and living off of personal support to be most effective. Coaching is not primarily reactive,

but rather organized and proactive in order to weekly help support raisers make progress toward their goals.

**Full-Time Coaches** - If you have more than 20 staff raising support at a time, then you probably need to have a full-time coach, and that person needs to immediately be multiplying themselves with a network of part-time coaches. If someone is fully focused on coaching, they should also spend additional time developing themselves as a coach, assist in trainings, and help with the overall organizational efforts in seeing all staff vision-driven and fully funded.

A full-time coach may be able to lead 15 to 20 people at most, as you can only have so many coherent conversations in a day without losing focus. Each coaching appointment needs preparation and note-taking afterwards, as well as a time to pray and prepare themselves for the coaching call.

**Part-Time Coaches** - Even if you have full-time coaches, begin developing a network for part-time coaches throughout your ministry. This is not only a good way to grow coaching capacity, but helps strengthen your support raising culture through your ministry teams. Part-time coaches should have 2 to 4 people they are coaching at a time for two primary reasons. For one, coaching multiple people at a time allows them to have a broader perspective on issues that arise, so they do not begin to see everything through one person's lens. Also, having more than one person to lead gives legitimacy of them actually being a coach and fulfilling a role with an established job description, rather than simply being asked to help out an individual in their support raising.

#### **Insights:**

- Coaches for new staff are the primary representatives of your organization, and they should be excellent ambassadors of your support raising culture and policies.
- The first several weeks after training and the commencement of raising support are the most critical time when their best contacts can be squandered if not coached properly. If at all possible, a coach, staffer, or an experienced support raiser should accompany new staff on one of the first five support appointments to give constructive feedback. Role playing is good, but observing them in a real appointment is even better.
- Pro-active and intentional coaching requires weekly coaching appointments during the first 3-4 months, and depending on the situation, scaling back to every two weeks afterwards.
- Most ministries will find their coaches from their veteran workers who have worked 2 or more years, are fully funded, and have a good understanding of effective support raising principles.
- If you are asking spouses of a fully funded couple to coach, ensure the spouse has played an active role in every aspect of support raising.

## Support Raising Director

**Summary:** Establish and lead the organization's support raising culture, infrastructure, training, and coaching. The director is responsible for all staff being fully funded before launching to their ministry assignments and ensuring all veteran staff are either staying within allowed norms for compensation and fundraising expectations or allocating work time to regain full funding levels.

**Rationale:** The director role is primarily focused on the overall support raising health of the entire organization. While this person may coach some, the director should be focused on coaching the coaches, creating an organizational culture as well as organizational systems, training, and development programs that empower all staff to get fully funded and stay fully funded.

**Insights:** While the messaging and examples of support raising culture should be modeled by all senior leadership, it should be clear to everyone in the organization who the support raising director is that

oversees the infrastructure, training, coaching, policies, and resource development. If you only have a few people raising support at a time, then maybe this is a portion of someone's job description. If you have more than 20 new staff a year and 10 people raising support at a time, then you probably need someone devoting at least half their time to this area. If you have more than 40 new staff per year and 20 active support raisers, then your organization needs both coaches and a full-time support raising director.

**Organizational Chart** - Where your support raising leadership falls in your organizational chart can have serious implications. Support raising is not an operational or administrative role. The leadership of this area needs to live on personal support, and their division should be led by leaders who raise support. Organizations whose support raising directors are under the leadership of a paid senior leader often have continued frustrations. Some ministries promote people to leadership positions and ask them to keep their personal supporters, but their salary is guaranteed and subsidized if needed. This can have adverse effects if you desire your organization to have a thriving fully funded culture. Leaders should lead by example and model what they want others to do.

## Specialized Roles

**Trainers:** Find energetic and gifted trainers who can lead your training times. This might be a part time or full time role depending on your organization's size.

**Women:** If you have women raising support, then you need female support raising coaches who have modeled successful personal support raising.

**Ethnic Minorities:** If an organization desires to recruit more ethnically diverse staff, then you need to have similar diversity in your support raising coaches and trainers. Starting out, this may be difficult, and it might be wise to seek out guest coaches or trainers, as many people desire to see someone like them from a similar background who has successfully raised their support.

**Senior Staff Coaches:** Coaching veteran support raisers or helping leaders raise larger budgets requires coaches who have experience to draw from.

## Team Leaders or Support Raising Advocates

**Summary:** Every team leader has the responsibility to ensure his/her current members (already reported to their team) remain financially healthy, invest the time in proper supporter communication and relationship building, and stay within the norms of organizational policies in regards to their finances.

**Rationale:** For veteran staff, the team leader provides the most direct role in leading and shepherding staff, and support raising and financial health of their team members should absolutely fall into the purview of their job description. Some organizations have found success in identifying a Support Raising Advocate on each team who may assist (or be) the team leader in providing ongoing encouragement and equipping to the team in their support raising efforts. While the responsibility lies upon the team leader, there may be another team member who excels in this area who can be the pace setter and champion this area.

**Insights:** Team leaders should normally not be coaches for those who are in their support raising season. Team leaders often have too many responsibilities of leading their current team to give the time and attention to someone solely focused on support raising, and they too often cut corners on ensuring they are at 100% before they launch. Team leaders should be given reports on the financial health of his/her team. Leadership development should also be provided to team leaders in regards to shepherding and coaching their staff in this area.

## Three Roles of a Coach

Coaches play three distinct, yet often overlapping roles for the staff they lead in support raising: shepherd, skills mentor, and supervisor. Depending on the culture of the organization and the gifts of the coach, one or two of these roles will come naturally, while the other is easily neglected. However, each one is vital and takes intentionality to ensure all three aspects of the coaching relationship are exercised.

### 1. Shepherd

This role is about encouragement and demonstrating genuine care for the support raiser as a whole person. Coaches must get to know them personally and share in their joys and struggles. Support raising can be a difficult season spiritually, and coaches should be supportive and empathetic and lead them to continually trust God and grow in relationship with Christ.

### 2. Skills Mentor

Training doesn't end in staff orientation or at a Bootcamp. Coaches are there to equip staff with the nuances of support raising, troubleshoot problems, establish priorities, continually remind them of the core principles they learned, offer strategy ideas, and give constructive feedback on scripts, presentations and newsletters.

### 3. Supervisor

In the supervisor role, the coach does the critical work of providing accountability, evaluating efforts and results, and ensuring all organizational policies are being followed. Supervisors often fall into one of two ditches, either they come across as harsh and unfeeling, or they never address the glaring issues in the misguided attempt at being nice and gracious. Neither are beneficial. Godly supervision is full of grace and truth, even with the truth may hurt someone's feelings in order to help that person achieve their goals. While challenges and encouragement to do better are a part of the equation, empathy, soft words and heartfelt prayer are needed communication principles that lead to a successful coaching relationship.



# Outlines of Coaching Calls

## Weekly Coaching Calls

The proper ingredients for a coaching call is important. Your organization may have a nice acronym or different names, just make sure all the important elements are there. Proper coaching calls should last between 20 and 45 minutes and be done face to face through online meetings or in-person. Ensure sufficient time is given on each call to address all the areas.

### **Personal Catch-up**

For some staff, it is vital to build a relationship with their Coach, while other support raisers have a more transactional relationship. Coaches must ensure everyone feels valued and demonstrate personal care in order to not treat staffers like a task to finish.

### **Evaluation and Accountability**

Review the key measurables for that week (or time period). Hear what they feel like is going well, poorly and why. Be straightforward and always let your words be seasoned with grace. Celebrate their success and talk through their struggles. Remind yourself and them that you are always working for their best interest so they can get fully funded.

### **Troubleshooting**

Sometimes the staffer accurately knows what he/she needs help with and other times you will need to evaluate and discern where the problems are. Listen and address their stated issues as well as discern your own.

### **Encouragement**

Don't underestimate the power of genuine, personal and specific encouragement. Make a big deal of their successes and encourage them when they struggle. You are in a unique position to speak life into this person. Before your meeting starts, plan your encouragement and ask God how you can best encourage this person.

### **Goal Setting - SMART Goals**

There are always the general expectations, but make sure you together identify some important goals and action steps. Make sure you record goals that are set, send them an email with those, and review them in the next coaching call. Using the SMART acronym (Specific, Measurable, Attainable, Relevant, Time-Based) can help people evaluate and achieve their goals

### **Prayer**

Prayer is vital and should not be relegated to a quick wrap up at the end of the meeting. Take time to pray over them and have them pray over themselves, those who have given and for those they will talk with. Since this is all in God's will, we know God desires to hear us ask and loves to bring specific answer to our specific prayers.

## Monthly Recap Meeting

Once per month a support raiser and coach should do a quantitative and qualitative analysis of how the last four weeks went. This gives both of them a clear picture of progress, successes and struggles so they can make appropriate changes going forward.

### Review Contacts

Analyze the staffer's list of contacts. These numbers and location of contacts help determine strategy as well as how aggressively getting referrals needs to be pursued. Too few people to contact easily stalls progress and discourages people.

- Total number of contacts left to ask
- Number of contacts that are closed (decided already)
- Number of good contacts left
- Number of cold contacts left

### Review Presentation

If at all possible, a coach, staffer, or an experienced support raiser should accompany new staff on one of the first five support appointments to give constructive feedback. Role playing is good, but observing them in a real appointment is even better.

Afterwards, it is important to review the staffer's presentation monthly. This keeps the presentation sharp and minimizes the drift that often happens when support raisers feel bored with the standard presentation and begin adding things. Some staff become ineffective because their presentation has become convoluted instead of being accurate, smooth and compelling. This can greatly aid your troubleshooting and avoid letting problems persist unnoticed. Here are some questions to review:

- Has your presentation changed?
- How are you doing in these elements of a good presentation: building relational bridges, sharing the problem, the need, the solution, changed life stories, your role, the ask, and next steps?
- What are the minimum and average dollar amounts you ask for?

### Review Time Management and Other Commitments

Time management is a common struggle for support raisers. Some young staff have never had a 40+ hour per week full time job, so they don't have experience or habits of working hard for long stretches day after day. And for anyone, there are elements of support raising they don't like, and so it is hard to stay motivated and disciplined to manage everything.

It is easy for support raisers to slowly steal time away from their primary job of support raising by taking on too many responsibilities, i.e. ministry opportunities, church opportunities, social events, etc. Often those responsibilities are good and enjoyable, but they distract and prolong the support raising process. In this season, help the support raiser have life-giving outlets, but not distract from their primary job. Here are few sample questions for this area:

- What does your daily and weekly schedule look like?
- How much time on average are you spending on support raising prep, calls, and appointments?
- What other activities or commitments are you involved in, and how much time is that taking?

### Review Spiritual and Emotional State

The journey of raising personal support is often an emotional and spiritual roller coaster. Spend time listening to the joys and struggles of the last month. It is not the coach's job to fix their life, but rather lovingly remind them of truth and keep pointing them to Jesus.

- How are you doing at abiding in Christ, prayer, and renewing your mind through Scripture?

- Are your emotional tanks empty, full, or somewhere in between? How are you feeling?
- Are you still feeling confident in the biblical basis of support raising?

### **Review Progress and Benchmarks**

Review and celebrate the progress that has been made in the last month, financially, relationally, etc. Discuss what kind of financial pace the support raiser is on, and how effort and activity may need to be adjusted to meet their goals. Be sure and compare their weekly and monthly activity and financial progress to your organizational benchmarks. The monthly recap is when any warnings should be given regarding underperformance.

- What are the biggest factors that resulted in this month's numbers (for good or bad)?
- Is the support raiser meeting expectations and benchmarks? If not, what warnings should be given or steps taken?

### **Review Communication**

Maintaining good habits and following through on communication are important during this season. Coaches can help staff either start off on a healthy trajectory during their ministry career or instill bad habits from the beginning.

- Did the support raiser faithfully turn in a weekly report each week, on time?
- Are they promptly sending thank-you cards to new donors?
- Review the content from last month's newsletter and discuss content for the next newsletter.

## Quarterly Progress Review

Every three months, the Monthly Recap should include a Quarterly Progress Review or be done separately with a coach's supervisor if the staff person is struggling. This mile-marker can be used as an Ebenezer moment, a time of reflection, repentance, rejoicing and renewed devotion to God and a specific course of action (1 Samuel 7). This is primarily relevant for those who are not on pace with their goals or organizational benchmarks, though periodically stepping back from the situation and reviewing one's calling and commitment is healthy for all support raisers.

### **Gut Check & God Check**

Essentially, coaches should ensure the support raisers heart is still in this, that they affirm God's calling on their lives in this ministry, and that they believe God will provide the resources necessary to join the ministry. Help the staffer rekindle their fire and determination, and have them rehearse why they joined staff. Coaches may need to remind them of the vision and give them fresh stories from the field.

### **Benchmarks**

Evaluate the staffers' financial progress in light of the organization's benchmarks. Are they on pace, behind, ahead? Given their current pace, when would their expected completion date come? Is that acceptable?

### **Adjustments**

These may be small changes or they may be radical changes a staffer wants to or needs to make. Now that significant time has passed, the staffer and the coach may see what the results of previous decisions (good or bad) have produced. The coach and staffer should each evaluate, write out, and agree on changes that need to be made moving forward.

### **Broader Goal Setting**

The weekly and monthly goals for activity and results will almost always remain the same. However, there are a myriad of other goals that can be evaluated and added to assist staffers in moving toward being fully funded. It may be improving their organization and administration, setting a specific place and time to start the work day, or establishing a workflow for the week (daily schedules or Monday-Wed focus on one thing, etc.). These changes are then incorporated into the weekly and monthly conversations.

# Reporting Systems and Content

The goal of every coach and organization is to provide an environment for staff to be fully-funded and have the ability to stay in the ministry God has called them. If organizations and coaches take that goal and responsibility seriously, they must do three things. One, provide a clear path of what activities have historically led to support raising success (i.e. training). Two, they must provide a system to accurately understand what activities the support raiser is doing (i.e. reporting). Finally, they must evaluate those activities to both celebrate victories and recommend adjustments in order to optimize success (i.e. accountability).

Utilized correctly, weekly reports on support raising activity and progress are essential tools in coaching. A wise and experienced coach knows what norms and expectations are, and record keeping and reporting allows a coach to quickly ascertain deviations from the norm and offer needed instruction. When coaching support raisers, one receives all types of subjective information, which must be taken into account during coaching appointments. However, one cannot measure the subjective, but one can measure objective and quantifiable things.

In order for reporting and accountability to be received well, it must not be seen as a useless activity or simply a means to be measured against with reprimands or praise. Instead, coaches must use the reports as part of their coaching conversations in a constructive manner. Coaches can use the objective information to ask the right questions that expose the underlying issues. Also, if coaches receive reports and never refer to them, then staff will come to believe these are unnecessary and therefore, a waste of their time. Evaluate your reports and ensure your coaches know why your organization measures what it does, and how each area measured can be used to uncover patterns of behavior or activity that are not leading to the desired results.

If support raising reports are utilized for the benefit of the staff, most will not chafe against the time consuming weekly reports. However, some will still challenge authority, be habitually late, or become insubordinate in this area. Accepting one's responsibility, making diligent plans, following through on your word, and accountability are biblical concepts found throughout Scripture. So coaches at times may need rebuke and correct them as Paul implores us to do in 2 Timothy 3:16, and also reprimand them as a supervisor and employer.

The concept of accountability can be scary for many because they associate it with some of their deepest fears of failure and not being good enough. This should be openly discussed and demonstrated that reporting and accountability exists in the context of Christian discipleship and a loving community where we lean on the wisdom of others and walk together toward the goals God has for us. All of this is done by both the organization and the coach in the context of grace and affirmation.

# Weekly Support Raising Report

**From:** Support Raiser

**To:** Support Raising Coach and Encouragement Partner (optional)

**Frequency:** Weekly

**Summary:** A weekly report is the core resource to help both the support raiser and the coach know how the support raising process is going. The report shows support raising activity, results, monetary progress, and priorities for the following week. Questions should also be included to garner personal feedback on how they are doing spiritually and emotionally and an opportunity to ask for specific training or help on certain issues.

## Report Data

Activity:

- # Dials (attempts to contact for appointments)
- # Conversations (total people contacted)
- # New Contacts (referrals or additions)
- # Appointments
- # Asks

Results:

- # New Monthly Donors
- \$ Amount New Monthly Support Received
- \$ Amount of New Monthly Pledges
- \$ Amount of New Special or Launch Gifts

Progress:

- \$ Monthly Support Goal / \$ Total Committed / \$ Started
- \$ Launch Goal / \$ Amount Committed / \$ Launch Funds Received

Plans for following week:

- # Appointments set up for next week
- Priorities for next week

Personal Feedback:

- Highs and Lows of the week
- Prayer requests
- What skills or materials would you like help on?

This weekly report should lead the coach to ask questions and provide equipping in certain areas. Every organizational culture will care about other details, so feel free to add to the core content as needed. Remember that if the report gets too long it may become a struggle to get support raisers to fill it out well.

# Monthly Recap Report

**From:** Support Raiser

**To:** Support Raising Coach, Support Raising Director

**Frequency:** Monthly

**Summary:** Once per month a support raiser and coach should do a quantitative and qualitative analysis of how the last four weeks went. This gives both of them a clear picture of progress, successes and struggles so they can make appropriate changes going forward. If possible, the quantitative areas of support raising activity and results will be compiled in a report for the Support Raising Director and other senior leadership (optional).

## Report Data

Activity:

- # Total Appointments for the month
- # New Contacts Added

Results:

- \$ Amount of new monthly support started this month
- \$ Amount of new monthly pledges this month
- # of new monthly supporters
- \$ Amount of new special or launch gifts

Progress:

- \$ Monthly Support Goal / \$ Total Committed / \$ Started
- \$ Launch Goal / \$ Amount Committed / \$ Launch Funds Received

Status

- # Remaining contacts (actively trying to get conversations or not contacted)
- # Average weekly hours in support raising work this month (0, 10, 20, 30, 40 hours)
- Date started support raising
- Date of 100% Goal
- # Months support raising (dropdown 1-20)

The Monthly Recap is in addition to the Weekly Report and sets up the Monthly Review Call. If the recap report provides only objective data, it is easily shared with the Support Raising Director and other senior leadership wanting to review progress of all active support raisers in a spreadsheet view, but not see personal notes in the weekly reports.

# Staff Financial Health Monthly Report

**From:** Finance Department

**To:** Filter reports to send to appropriate leaders: Coaches, Support Raising Director and other organizational leaders (HR, Member Care, national, regional, area, and team leaders)

**Frequency:** Monthly

**Summary:** This monthly report contains all the support raising staff in the organization. Its purpose is to quickly ascertain the overall financial health of each staff member. This allows the coaches to verify donation totals and trends as well as lets the Support Raising Director and appropriate leaders quickly identify and respond to staff who are struggling. Coaches and the Support Raising Director will simultaneously consult the Monthly Recap Report to compare information reported by the support raiser and what donations are actually coming in.

**Format:**

- Developing an extensive report which brings together donation, payroll, and account balance information will take time to create with the collaboration of one's finance department.
- Excel can do amazing things to sort and segment if you include information such as division, team, and coach's name.
- Reports should be segmented, filtered, and sent to appropriate leaders, or a database software can limit who sees what.

**Report Data:**

- Donation Data:
  - 24 columns for past 12 months of monthly # donors and \$ donation totals (hide all but the last 3 months, more historical data can be expanded and viewed)
  - Average \$ donations from last 3 months and 12 months
  - % Current Month's Support ( $\$ \text{ received} \div \$ \text{ goal}$ )
  - \$ Monthly support goal
- Payroll Data:
  - % Payroll average of last 3 months
  - % Current Month's Payroll ( $\$ \text{ paid} \div \$ \text{ goal}$ )
- Account Balance (after all admin fees, payroll, and benefits are deducted for the month)
- Health Status: Status of green, yellow, orange or red determined by organizational policies
  - Example of a financial health indicator formula:
    - Green: 6-month donation average % > 90% of goal & 100% Payroll & Full Buffer
    - Yellow: 6-month donation average % < 90% of goal & 100% Payroll & Full Buffer
    - Orange: 100% Payroll and Buffer is 51%-99%
    - Red: < 100% Payroll or Buffer < 50%

**Optional Items:**

- \$ Launch Goal
- % Launch Budget Raised ( $\$ \text{ received} \div \$ \text{ goal}$ ) – it is often hard for a finance department to separate monthly gifts from launch or special gifts
- \$ Approved payroll goal
- \$ Current month's payroll



# Benchmarks

## Setting Coaches Up For Success

A good coach should not ask the impossible nor ask too little of those they lead. Coaches should know healthy expectations based upon certain activities and effort. Therefore, each organization should invest the time to research internally and seek out counsel from other ministries to derive their benchmarks and expectations for support raising. SRS fully recognizes that God is our ultimate provider and that while support raisers can do the work of support raising, God must move in the hearts of people to give. As Paul says in 1 Corinthians 3:6, "I planted, Apollos watered, but God gave the growth." SRS teaches in *The God Ask*, support raisers are asking God for provision, and inviting potential partners to ask God for direction. Knowing best practices, trends, and defining bench marks can help you better determine when God may not be providing and thus guiding to a different path. Here are just a few areas coaches need clear understanding on in order to give proper guidance.

### **Expectations of Activities and Monetary Benchmarks**

The greatest factor in how long it takes support raisers to reach 100% is the expectations your coaches and organization place on them. Do you train your staff to have 10 appointments a week or 5? Do you expect them to raise their support in 6 months or 18 months? People need and want clear expectations. Without them, staffers won't know if they are succeeding or if they are on the right path. Expectations and benchmarks transforms support raising from vague ethereal concepts to a practical path for success. They are looking for and need someone to tell them exactly how to get there.

### **Full-time or Part-time Support Raising**

The second most significant factor in support raising is the time invested. This should be a mutually agreed upon time commitment between the coach and support raiser. Again, the expectations and challenges you give to staff will be their "normal." Coaches must adjust their expectations and benchmarks based upon their agreed upon time investment. People devoting themselves full-time will obviously reach 100% faster than part-timers. Create pathways and train your recruits on options for immediate full-time support raising or outline a gradual process starting from 20, to 30, to 40 hours per week devoted to support raising.

### **Knowing the Finish Line**

What is "fully funded?" Both the support raiser and the coach should know without a doubt what the finish line is, and how that will be measured. Pledges don't buy groceries, so make sure your support raisers and team leaders know that pledges do not count when it comes to crossing the finish line. Coaches must also look beyond the donations coming in and receive clarity from staff which donations are truly recurring monthly, annually, or special gifts. It is normally not advisable to launch without 100% funding through recurring donations.

Work diligently with your staff to create a vision-driven budget that is within your organization's policy, and record that number and save that budget worksheet. Organizations might also desire to have a standard starting salary and fundraising goal that allows that person to report to their ministry assignment. Encourage staff to be vision-driven with their budget and salary if you provide a range, and they wisely may budget a significant amount in retirement and additional areas. If a support raiser is meeting their goals and benchmarks, then by all means allow the staffer to get to their 100% vision-driven budget. However, if they are not on pace with their goals, plateau, or have a deadline, then it may be wise to have the secondary budget number that the organization considers acceptable. If the coach and

leadership feels there are good reasons to end the support raising time after they are past the minimal budget number, then the staffer may be asked to report to their ministry assignment and work on getting to their vision-driven budget later. This should be communicated well in advance, and the staffer some have some level of input to this decision as well.

### **Accountability and Enforcement**

Don't expect what you don't inspect. Coaching must entail goal setting, record keeping, reporting, and accountability. As discussed elsewhere in this coaching guide, standard support raising reports are critical tools for coaches.

Don't make a goal or policy if you never plan to enforce it. Accountability and enforcement should be done positively in order to empower staffers to reach full support and start ministry. You are adversely affecting new staff if we say we have expectations and benchmarks, but then never enforce them. Just like good parents, enforcement is not focused on consequences, but rather focused on modifying behavior so the person can achieve success. Allowing staffers to languish in ineffectiveness is a disservice to them, to your organization and to God's Kingdom.

## The Need for Benchmarks

Every organization needs clearly defined expectations regarding the pace of support raising and what demonstrates success or struggle. We call these Benchmarks and they are needed for two reasons and two groups of people.

One, benchmarks provide a clear path toward the goal with clear short-term goals along the way. Setting clear expectations help people know what work needs to get done and motivates them to finish support raising in a timely manner. For staff who are meeting these benchmarks, there is encouragement and excitement which builds confidence and momentum.

Two, benchmarks demonstrate if a support raiser is getting off track. When that happens, the coach and support raiser can quickly troubleshoot and create a plan to get back on track. The goal is always to get staff fully funded, so it is important to identify when a person needs specific encouragement and training. This is a chance to encourage, motivate and see God show up in getting the support raiser back on pace.

Additionally, if a person can't get back on track and continuously misses the benchmarks, this system provides clear times to discuss if employment should be continued. This system should be impartial, fair and known by everyone involved. It is important not to let staff languish in ineffectiveness, but to come alongside them before it is too late. It is important to coach or train them toward specific goals of both effort and achievement.

# Expectations of Activity and Monetary Benchmarks

## General Guidelines on Support Raising Activity

Based upon continued research over the years, Support Raising Solutions has seen trends in donors' responsiveness to phone calls, conversations, and face-to-face asks. SRS has also observed that while the amount of support raised by people vary, the average number of monthly supporters remains relatively the same. Generally, support raisers have 40 to 70 regular partners, and we have set 60 as the average for our calculations.

Since the average number of donors remains the same, then it is the average monthly gift that fluctuates between those with \$3,000 and \$10,000 per month budgets. For example, a budget of \$4,500 would have average gift of \$75 per month ( $\$4,500 \div 60 = \$75$ ), and those raising \$9,000 should be asking for largest investments and should see their average gift be closer to \$150 per month.

<b>Monthly Support Goal</b>	From Personal Support Goals	<i>Example at \$4,500/month</i>
<b>Ministry Partners</b>	60 monthly partners on average	60
<b>Average Monthly Commitment</b>	Goal ÷ Partners	\$75
<b>Appointments</b>	Partners x 2	120
<b>Completed Calls</b>	Appointments x 2	240
<b>Dials</b> (conversation attempts)	Completed Calls x 4	960
<b>Contacts Needed</b>	Completed Calls x 1.2	288

## Standard Expectations for Support Raising Activity

The results are up to God, but the activity is largely up to us. God is our provider and moves in peoples' hearts to give. While we cannot predict or have an exact formula for support raising results, we can provide support raisers with activity based goals that often lead to successful outcomes. The following are standards of activity SRS believes is achievable, and expectations are adjusted based upon a 20, 30, or 40 hour per week investment into support raising. Coaches and individuals may choose higher goals, but weekly and monthly standards should be determined by the organization which it feels are not only achievable, but expected.

Activity Standards	Full-time 40 hrs / week		Part-time 30 hrs / week		Part-time 20 hrs / week	
	Week	Month	Week	Month	Week	Month
Dials	80	320	64	256	32	128
Completed Calls	20	80	16	64	8	32
<b>Appointments</b>	<b>10</b>	<b>40</b>	<b>8</b>	<b>32</b>	<b>4</b>	<b>16</b>
New Partners	5	20	4	16	2	18
<b>Adjusted Monthly Appointments*</b>		<b>32</b>		<b>24</b>		<b>12</b>
<i>Adjusted Monthly New Partners*</i>		16		12		16

**\*Monthly Adjustments:** Over the course of a month, support raisers often have ups and downs in their numbers of appointments per week and thus new donors. By adjusting the monthly expectations down 20-25%, it allows for aggressive weekly goals but provide some margin of leniency in evaluating the standard level of progress for the month.

## Monetary Benchmarks

While coaches can more easily hold support raisers accountable to activity, monetary benchmarks are useful to ensure the goal of getting to full support is achieved in a timely manner. Regardless of activity, it is the monetary benchmarks that lead to full funding, and God may choose to provide the funds through little activity on the support raisers part, or not provide funds after extraordinary activity. Organizations may use the monetary benchmarks as the primary way to help discern whether this ministry is the right fit at the right time for this person to join their ministry.

Time is the enemy of support raising, as prolonged support raising time leads to discouragement, lack of urgency, financial hardship, burnout, stress, doubt and impatience by ministry partners. In today's reality of 3 year commitments, it doesn't make sense to allow new staff to raise support 1 to 2 years.

Benchmarks are adjusted based upon level of effort, or time given to support raising. Those who cannot support raise full-time may start out part-time and gradually move to full-time support raising. Part-time support raisers should be coached through a timeline of gradually moving to full-time support raising.

## Standard Benchmarks - Weekly: New Monthly Support

Weekly Standard Benchmarks are adjusted to the overall goal of the support raiser. It is not feasible to expect a person with a \$10,000 per month budget to have 200 monthly supporters and take 2-3 years to raise support raising \$100 to \$250 of support per week, so the larger the budget, the higher the average donation, and the higher the weekly expectations of new support.

<b>Weekly Benchmarks</b>	<b>Full-time 40 hrs / week</b>	<b>Part-time 30 hrs / week</b>	<b>Part-time 20 hrs / week</b>
Appointments	10	8	4
New Partners	5	4	2
	<i>\$ per week</i>	<i>\$ per week</i>	<i>\$ per week</i>
@ \$50 ave gift (\$1k - \$3k/mo)	\$250	\$200	\$100
@ \$75 ave gift (\$3k-\$5k/mo)	\$375	\$300	\$150
@ \$100 ave gift (\$5k - 7k/mo)	\$500	\$400	\$200
@ \$125 ave gift (\$7k - \$9k/mo)	\$625	\$500	\$300

## Standard Benchmarks - Monthly: New Monthly Support

Below are monthly benchmarks at varying levels, much like the weekly benchmarks. Note that there is a normal monthly (4-week) standard and minimum benchmark, but also an adjusted amount for the month as well. The financial amounts are based upon the adjusted number of new partners per month. Over the course of a month, support raisers often have ups and downs in their numbers of appointments per week and thus new donors. By adjusting the monthly expectations down 20-25%, it allows for aggressive weekly goals but provide some margin of leniency in evaluating the standard level of progress for the month.

If a support raiser claims a full-time commitment to support raising, discernment and investigation should be exercised by the coach whether they are utilizing their time appropriately, and held

accountable to the full-time standard and minimum benchmarks. If standards of support raising activity consistently fall below the standards, then conversations should be had as to whether they should be held accountable to the minimum benchmark for 40, 30, or 20 hours per week.

Monthly Benchmarks	Full-time 40 hrs / week		Part-time 30 hrs / week		Part-time 20 hrs / week	
	Monthly Standard	Monthly Minimum	Monthly Standard	Monthly Minimum	Monthly Standard	Monthly Minimum
New Partners	20	10	16	8	8	4
New Partners Adjusted	16	8	12	6	6	3
@ \$50 ave gift (\$1k - \$3k)	\$800	\$400	\$600	\$300	\$300	\$150
@ \$75 ave gift (\$3k-\$5k)	\$1,200	\$600	\$900	\$450	\$450	\$225
@ \$100 ave gift (\$5k - 7k)	\$1,600	\$800	\$1,200	\$600	\$600	\$300
@ \$125 ave gift (\$7k - \$9k)	\$2,000	\$1,000	\$1,500	\$750	\$750	\$375

## Using the Support Raising Progress Chart

The following page is a screenshot of a spreadsheet that shows the monetary benchmarks which adjusts based upon one's monthly support goal and shows varying benchmarks for 20, 30, and 40 hours per week of support raising effort.

### Show the Standard – Not the Minimum Benchmarks to Staff

For the sake of both the organization and the support raiser, each organization needs clear monetary benchmarks with timeframes. Support raisers should be given the organizations standard benchmarks, but not the minimum standards. Only when staff are failing to meet the benchmarks and going into the warning system, should staff be informed what their minimum level of progress should be to get out of the warning system.

**Monthly Adjustments:** Over the course of a month, support raisers often have ups and downs in their numbers of appointments per week and thus new donors. By adjusting the monthly expectations down 20-25%, it allows for aggressive weekly goals but provide some margin of leniency in evaluating the standard level of progress for the month.

**Download Spreadsheet:** SRS Network Members may download this spreadsheet in the SRS Network Members portion of the SRS website.

## Support Raising Progress Chart

**GOAL: Amount to Raise**

**\$4,500**

**THIS IS ONLY CELL FOR INPUT, ALL OTHERS WILL ADJUST (in Excel)**

**Number of Partners**

60

*Standard average for all support raisers*

**Average Gift**

\$75

*Average gift increases as Goal increases*

Level of Effort	40 hrs per week		30 hrs per week		20 hrs per week	
	Standard	Minimum	Standard	Minimum	Standard	Minimum
New Monthly Partners (Standard Goal x 4 weeks)	20	10	16	8	8	4
Monthly Adjustment	80%	80%	75%	75%	75%	75%
<b>Monthly Adjusted Goals*</b> (adjusted down 20-25%)	<b>16</b>	<b>8</b>	<b>12</b>	<b>6</b>	<b>6</b>	<b>3</b>
<b>Monthly New Support</b> Ave Gift x Monthly Adj Goal	<b>\$1,200</b>	<b>\$600</b>	<b>\$900</b>	<b>\$450</b>	<b>\$450</b>	<b>\$225</b>
	Standard Monthly Target	Minimum Monthly Target	Standard Monthly Target	Minimum Monthly Target	Standard Monthly Target	Minimum Monthly Target
<b>Month 1</b>	\$ 1,200	\$ 600	\$ 900	\$ 450	\$ 450	\$ 225
<b>Month 2</b>	\$ 2,400	\$ 1,200	\$ 1,800	\$ 900	\$ 900	\$ 450
<b>Month 3</b>	\$ 3,600	\$ 1,800	\$ 2,700	\$ 1,350	\$ 1,350	\$ 675
<b>Month 4</b>	<b>\$ 4,800</b>	<b>\$ 2,400</b>	\$ 3,600	\$ 1,800	\$ 1,800	\$ 900
<b>Month 5</b>		\$ 3,000	<b>\$ 4,500</b>	\$ 2,250	\$ 2,250	\$ 1,125
<b>Month 6</b>		\$ 3,600		\$ 2,700	\$ 2,700	\$ 1,350
<b>Month 7</b>		\$ 4,200		\$ 3,150	\$ 3,150	\$ 1,575
<b>Month 8</b>		<b>\$ 4,800</b>		\$ 3,600	\$ 3,600	\$ 1,800
<b>Month 9</b>				\$ 4,050	\$ 4,050	\$ 2,025
<b>Month 10</b>				<b>\$ 4,500</b>	<b>\$ 4,500</b>	\$ 2,250
<b>Month 11</b>						\$ 2,475
<b>Month 12</b>						\$ 2,700
<b>Month 13</b>						\$ 2,925
<b>Month 14</b>						\$ 3,150
<b>Month 15</b>						\$ 3,375
<b>Month 16</b>						\$ 3,600
<b>Month 17</b>						\$ 3,825
<b>Month 18</b>						\$ 4,050
<b>Month 19</b>						\$ 4,275
<b>Month 20</b>						<b>\$ 4,500</b>

# Warning System, Levels, and Response

An emergency room triage nurse must be able to assess people's medical need, urgency, and dynamically adjust who gets medical attention in order to save everyone with a limited number of doctors and resources. In many areas of life, discerning and experienced professionals have created systems to evaluate when people or devices are performing at optimal levels, when their nearing danger zones, and when they are in immediate peril.

What happens when support raisers aren't meeting the monetary goals or even the minimum standards...coaches and organizations jump into the hardship with them providing extra support and motivation to get back on track! This should not be seen as a disciplinary action, but rather identifying and helping the people who need extra help.

Getting support raisers back on track is the purpose of the warning system. Employing a three level warning system is effective, impartial and hope-filled. Each level is accompanied by in depth troubleshooting as well as identification of specific action steps and goals with a timeframe attached. This gives realistic, tangible goals for the support raiser to achieve, build momentum and then get back on track.

Below is a framework for a Levels of Warning by Support Raising Solutions. SRS has consulted with multiple organizations in order to develop this framework. Organizations should do their due diligence in research, evaluate their current and desired support raising culture, and prayerfully agree upon a framework for their Levels of Warning. Organizations should review their policies every few years and make adjustments as necessary.

## Warning System and Triggers

### Triggering the Warning System

The Levels of Warning are triggered *if a support raiser doesn't meet the standard benchmarks for two straight months or at the end of any one month they fall below the minimum benchmark*. There is probably no need for panic, but this should be addressed seriously and immediately. It is counterproductive to think things will turn around without significant changes. If the support raiser responds well and completes the requirements for the warning, celebrate; that is the goal! This success should build momentum and confidence. Put the support raiser back on the normal pace of support raising.

### Levels of Warning

Again, the Levels of Warning help both the coach and the support raiser recognize where they are at, in order to take action to get back on track, so they can get to full support and start the ministry God has called them to. This process is done in the context of affirmation and grace. Also, coaches must be cognizant of any extraordinary factors that should be taken into consideration, such as deaths in the family, prolonged illness, or emergency situations.

## The Warning System

The warning system is three-tiered and each level is identified as a color. Warning levels progress with seriousness from yellow to orange to red. Many support raisers run into a lull at some point, dip into Level Yellow temporarily, and get back on track. Each warning is accompanied by:

- **Notification:** All warnings and goals should be reiterated through email, and Orange and Red levels require an actual sign-off on goals and timelines.
- **Troubleshooting:** an in-depth troubleshooting session to identify specific issues to be worked on.
- **Action Plan:** establishing clear actions steps and specific goals.
- **Timeframe:** establishing a specific timeframe to complete those specific goals.

## Reentry into the Warning System

After a staffer gets back on track, if they fail to meet the minimum financial standard again, they reenter the warning system at the most recent warning they resolved.

- Example: Pat fell below the minimum standard, entered Level Yellow, could not comply and entered Level Orange. Pat resolved Level Orange and got back on track. The next time Pat falls below the minimum standard, he restarts at Level Orange.

## Warning Levels and Responses

Level	Standard Timeframe to Resolve	Result
Yellow: Verbal	4 weeks	Return to Green or move to Level Orange
Orange: Written	4-8 weeks	Return to Green or move to Level Red
Red: Written	4-12 weeks	Return to Green or Transition off staff
<b>Total Time</b>	<b>3 months - 6 months</b>	

### Level Yellow:

#### Trigger

Two months in a row below the monthly standard benchmark.  
OR, one month below the monthly *minimum* standard benchmark.

#### This is Verbal Warning

The coach explains that the support raiser has entered the warning system, what that entails and where it might lead. This is done both with seriousness as well as with hope and encouragement, reminding them that the coach and the system is there to help them toward their goal of being fully funded and starting ministry. Verbal warnings still must be backed up with an email explaining the warning, action plan, and timeframe.

#### Troubleshooting

The coach troubleshoots and identifies specific activities that must be done better and sets specific goals in these areas.



### **Action Plan**

The coach sets goals that are both monetary and activity based, but they focus on the activities. The financial goal remains the minimum amount of new monthly support in that time period or higher.

### **Timeframe: 4 weeks is standard**

It is not a long period of time because the assumption is that the support raiser just needs a little help identifying trouble areas and re-focusing their attention on these things. The goal is to jumpstart the staffer to quickly get back on track.

### **Escalation**

If the goals of the Level Yellow action plan are not satisfactorily completed within the designated time frame, the support raiser moves to Level Orange.

*Note: The support raiser would continue in Level Yellow if they are below the standard benchmarks, but still above the minimum standard. In this case, a support raiser would stay in Level Yellow until they move out of the warning system or fall below the minimum standard and then move into Level Orange.*

## **Level Orange:**

### **Trigger**

Not satisfactory completing Level Yellow, i.e. most likely a second straight month of being below the minimum standard benchmarks

OR, Reentry: If a support raiser was previously in Level Orange, got back on track, but have now fallen below the minimum standard benchmark again, the support raiser reenters Level Orange.

### **This is a Written Warning**

The coach sends the warning and action plan with specific goals to the support raiser to sign and send back. The coach distributes this plan to the appropriate organizational personnel, e.g. team leader, HR person, Support Raising Director, etc.

### **Troubleshooting**

The hindrances may be clearly known or more complicated than previously thought. A more thorough troubleshooting session may be needed. The Gut Check and God Check analysis as mentioned in the Quarterly Review Meetings should also be done.

### **Action Plan**

The financial goals for the action plan remain the minimum amount of new monthly support or higher. New activity goals are set by the coach. This can be any activity or assignment (e.g. a specific time and place to start their work day, number of appointments, number of dial per day, etc.)

### **Timeframe: 4-8 weeks is standard; the coach picks a date within this period**

The coach picks a date within the 4-8 week time period. This timeframe could be longer than Level Yellow because it could take longer to resolve the core issues and build momentum again. If a support raiser has many activities to improve upon, it may take a couple of weeks to build momentum and get consecutive weeks of quality activity resulting in new support that meets the minimum standard.

### **Escalation**

If the goals of the Level Orange action plan are not satisfactorily completed within the designated time frame, the support raiser moves to Level Red.

## Level Red:

### Trigger

Not satisfactory completing Level Orange i.e. most likely a third or fourth straight month of being below minimum standard benchmark.

OR, Reentry: if you were previously in Level Red and moved to Level Green, but have now fallen below the minimum standard benchmark, the support raiser reenters Level Red.

### This is a Written Warning

The coach sends the warning and action plan to the support raiser to sign and send back. While the Orange Level warning may be an email acceptance or digital signature, a more formal warning letter mailed with duplicate copies for one to sign and return may give added weight to the matter and satisfy any HR requirements for giving written warning before any termination procedure is employed.

### Troubleshooting

Continue troubleshooting. At this point one would assume the problem issues are very clear and there are clear action steps to take. The Gut Check and God Check analysis as mentioned in the Quarterly Review Meetings should also be done.

### Action Plan

The only goal in the new Action Plan is a financial one. This happens because it is the only verifiable measurement and ultimately it is the only one necessary to get fully funded.

The coach should continue to help identify and set goals for the activities that need to take place, though they won't be part of the official evaluation.

### Timeframe: 1-3 months

The standard timeframe for Level Red is one month, but could be extended up to 3 months as appropriate for the situation.

### Escalation

The next step is for the support raiser to transition off of staff. See the next section for further details.

## Transitioning Off Staff

In describing their system of warning levels and process of releasing someone from their organization, a support raising director said, "I cannot tell someone that it is not God's will to do this type of ministry. But I can with a clear conscience say that it is not God's will for them to do it through our ministry." Whatever your stance on the will of God is, having a well-defined process for ending the relationship of new or veteran staff based upon lack of support is crucial. To allow people to linger and limp along is demoralizing for the person, their support network, and even your other staff. It can also lead to financial hardship and a loss of reputation for both the support raisers and organization.

If a support raiser has demonstrated that he/she cannot raise the minimum standard month after month after month (the process takes at minimum three months), this should be a clear indication to both the organization and the support raiser that full-time service with this organization is not currently the place for them to serve the Lord.

Ultimately, a leader within the organization needs to prayerfully make a decision to let someone go and end their support raising time. While some may allow continued extensions, be careful that you aren't hurting or enabling the situation more than helping it. The purpose of an organizational policy and benchmarks is not to break it, but to be used as a tool to help make consistent and quality decisions. As an organization, think through how you want to help this person transition to the next season of life, i.e. communicating to their pastor, what happens to the money in their account, discerning next steps, etc.

# Principles of Coaching

## **Modeling and Role Playing**

Even if you have a thorough training program, pair up each new support raiser with a qualified coach or veteran staffer who can review things with them. Go through the circle of training: “I do, you watch. We do together. You do, I watch. You do on your own.” Help each and every staff person practice their phone call to get an appointment, support presentation with an ask, and follow-up call. Also, walk them through the first creation of their initial communication scripts and tools...from a phone call script to presentation of newsletter.

## **Face to Face Coaching**

Technology today allows anyone with a computer or smartphone to utilize video conferencing for coaching appointments. All normally scheduled coaching appointments should be done in person or through video meetings. Phone calls, emails, and timely texts are good secondary ways to stay in touch and offer encouragement or troubleshoot an urgent issue, but they are mediocre forms of communication that don't allow the coach or support raiser to read facial expressions, show the empathy, or impart/receive hard truths in a loving way.

## **Community and Personalization**

Many people crave community and can feel alone and isolated when raising support. In person meetups with staff or group video-conference calls can bring a sense of community to those included. These group times are best for prayer, general skills-training, and sharing of encouraging God-stories. Coaching, troubleshooting, and accountability should always be done one-on-one.

## **Understand Your Audience**

God made us unique, and even Jesus engaged with people in different ways because he knew their personality, cultural perspective, or personal prejudices. Likewise, coaches must become all things to all people and learn how coaching might be different amongst millennial college students, mid-career professionals, boomers, nationalities, men, women, minorities, rookies, veteran staff, etc. If possible, coaches should be paired up support raisers with similar experiences or backgrounds.

## **Train Support Raisers Before You Coach Them**

Coaching is best done after thorough training of the new support raiser. Some ministries have minimal training and opt for in-depth coaching, but personalized coaching simply can't impart all the knowledge needed when launching into support raising. Have them read a quality support raising book, do in-depth bible studies, and go through in-depth and focused training and role-playing before you release them to raise support and start the process of being personally coached.

## **Ask Questions**

Coaches shouldn't just be teaching and responding, they should be investigators. Many times the support raiser won't be able to comprehend the underlying issues which are holding them back. For example, you may think you're coaching well by helping them find more contacts and referrals, and they may be asking for that sort of help. Yet, their current underlying issue might actually be that they don't feel like they are a valuable investment because they forgot their biblical convictions....so they are filtering many people off their list or they aren't motivated to use those contacts to set new appointments anyway. So continue asking questions that dig deeper when problem solving.

## **People Are Complicated**

Support raising is not the only thing going on in life. Family members have illnesses, sisters are getting married, kids have recitals, and married couples still need date nights to keep their marriage healthy. Coaches should be aware of the life of their support raiser and not be myopic on just their support raising activity. While people can easily make poor choices in time management, good coaches can help set priorities, know when to encourage them to take some rest, or encourage them to focus during chaotic times. That said, coaches should help those they coach establish priorities and back out of many commitments (personal and other ministry commitments) that do not help them get to their support raising goal in a timely manner.

## **Coaching and Training Never Stops**

New support raisers aren't the only ones who need encouragement, equipping, and accountability in support raising. Your team leaders need to be equipped in support raising coaching and your routine staff reports should include elements that focus on their financial and support raising health as well.

## **Implore Staff to Work Hard and Rely on God**

Support raising is part of the ministry God calls us to and should be used as a vital step in establishing a lifestyle of partnership with God; i.e. of faith in God, reliance on God and our wholehearted effort. In 1 Corinthians 15:10 Paul said, "But by the grace of God I am what I am, and his grace toward me was not in vain. On the contrary, I worked harder than any of them, though it was not I, but the grace of God that is with me."

God's grace is both his unmerited favor and the power to do God's will. Paul didn't waste God's favor and power, he rooted his identity in grace and used grace as his only source of fuel to take action. He worked hard because he had the favor of God, not because he was trying to earn God's favor. The power to do ministry is initiated by God, God's power carries us through, and God completes His plans; our job is to partner with Him. We work hard, but mysteriously it is also the power of God working hard through us. As we coach, we continually remind support raisers of this mystery and partnership with God. If learned well, we can translate many of the lessons from support raising into effective supernatural ministry.

## **Resource Library**

When you call up customer service or technical support, the person on the other end of the line has tons of information and tutorials to lean upon for finding solutions to your questions. Likewise, support raising coaches need a place to go for answers. Here are some helpful ideas:

- Develop your own cheat-sheet for the most common problems
- Join the SRS Network and have access to hundreds of topical training videos you can send to your staff, watch webinars from other leaders, and find valuable resources.
- Utilize free articles from the Support Raising Solutions blog archives (100+ articles), Scott Morton's articles and videos at [scottmorton.net](http://scottmorton.net), and other blogs of support raising trainers your organization has vetted.
- Get familiar with key chapters in support raising books: *The God Ask*, *Funding Your Ministry*, *Friendraising*, *People Raising*, and others.

## **In-sourcing and Outsourcing Support Coaches**

As an organization, there are pro's and con's to looking for outsiders for coaching. If you don't have any successful fundraisers, you may need to seek out external help. Ultimately, your staff will be served best with qualified coaches who understand the ministry they are raising support for. If you do look to outsiders for coaching, ensure they are coaching from personal experience, they agree with your principles and values, and that someone internally is helping them communicate their ministry role and vision accurately.

## Equipping the Coaches

Ensure your coaches are properly trained before they begin. This can be done in a variety of ways, but whatever the vehicle, a thorough review of both the systems and the content are essential for a coach feel confident and begin well.

### Utilize the SRS Network to continually develop your coaches and support raising leaders.

- **Support Raising Leaders Conference:** You are not in this alone. Leverage the experience of other ministries as you establish your support raising culture and policies. This conference focuses on learning best practices through case studies, presentations, and group discussion on topics such as support raising training, coaching, resources, accountability, and policies. SRS Network Members receive a \$50 discount to the Conference.
- **Catapult video series:** Equip and refuel your staff through more than 250 topical teaching videos on personal support raising by Steve Shadrach, author of *The God Ask* and founder of SRS. You can email the videos to all your staff or send specific videos to staff who need development in certain areas, such as growing their names list, biblical questions, referrals, or vision-driven communication.
- **Monthly webinars:** Develop yourself and your support raising coaches through monthly one-hour webinars led by veteran support raising leaders who teach on common support raising challenges and answer your questions in real time. Members also have access to all archives.
- **Training Options**
  - **SRS Foundations:** SRS has taken the 30-40 hour preparation component of SRS Bootcamp and created an online guided learning course. From anywhere in the world, recruits and staff process through training videos, extensive bible study, and instructions on creating the tools for support raising. Because we believe so much in live training, SRS Foundations is made to be used to accompany a ministry's in-house training or as a refresher for veteran staff.
  - **SRS Bootcamp** combines SRS Foundations with two days of live training, role playing, and peer discussion. This workshop training model is designed to help your staff think through their perspectives on support raising and develop the strategies and skills to reach and stay at full funding. Train your staff with public SRS Bootcamps or facilitate your own
- **Exclusive resources:** Your trainers and coaches will have the following at their fingertips:
  - Support Raising Coaching Guide and resources
  - Audio archives from Support Raising Leaders Conferences
  - SRS Bootcamp activity resources for purchase
  - Resources in multiple languages as we create them
- **Organizational audit:** Discover your organization's strengths and weaknesses. We've developed a survey that helps you get a pulse on your staff's support raising health. Filter the results for acute analysis and schedule a phone call with us to debrief.

# Appendix: Job Descriptions

## Support Raising Director

**Reports to:** The Support Raising Director reports to the Human Resources Director or appropriate senior leadership (may vary based on organization).

### **Job Overview:**

The Support Raising Director role is primarily focused on the overall personal fundraising health of the entire organization. The Director is focused on creating an organizational culture as well as organizational systems, training, and development programs that empower all staff to get fully funded and stay fully funded.

### **Responsibilities and Duties:**

#### Support Raising Systems

- Creates, maintains and manages the mechanisms by which the organization trains, equips and empowers their staff in effective support raising.
  - New staff support raiser training and equipping.
  - Current staff continued growth and develop in their support raising skills, knowledge and effectiveness.
  - Current staff who fall below acceptable support level; guiding and empowering them to get back to fully funded.
- Manage, develop and empower fulltime and/or part-time coaches.
- Develop resources as needed.
- Regularly review all staff accounts for staff falling below acceptable funding ranges and help those staff get on a path toward being fully funded.

#### Support Raising Culture

- Maintains being an encouraging and insistent voice for quality support raising throughout the organization.
- Works well with other organizational leaders.
- Develops support raising priorities for an organization.
- Develops and implements support raising policies.
- Ensure other leaders in the ministry are informed, empowered and engaged in enacting support raising policies throughout the organization.

### **Qualifications:**

- Experiences within your organization and able to work well with other leaders.
- Models a personal commitment to his/her own support raising and is fully funded.
- Demonstrates the administrative ability to manage organization-wide systems and resources.
- Demonstrates the relational skills to develop an organization-wide culture through personal modeling, clear communication, working with other leaders, and directing support raising coaches.
- Thoroughly believe that a fully funded staff is more effective in their ministry.
- Thoroughly believe that support raising is not a necessary evil, but rather an integral aspect of a staff person's ministry.

# Support Raising Coach

**Reports to:** The Support Raising Coach reports to the Support Raising Director (may vary from organization to organization).

## **Job Overview:**

Each Support Raising Coach is the primary staff person responsible for guiding a staff member (new or veteran) through the support raising process. Success entails consistent and constructive assistance that trains, instructs and propels the staff toward character growth and becoming fully funded within the designated time frame, resulting in ministry placement. The coach employs a holistic strategy by simultaneously playing the role of shepherd, supervisor and skill mentor to effectively equip each staff member through this season of support raising and character development.

## **Responsibilities and Duties:**

- Consistent coaching communication (1 face-to-face or video chat meeting per week; monthly and quarterly meetings, other communication as needed)
- Shepherding – Demonstrates care, compassion and affirmation for their emotional and spiritual health. Listens well and encourage them in the Lord.
- Supervising – Reviews activities, effort and results. Celebrates successes, troubleshoots areas of struggles, lovingly confronts and assists in providing a clear course of action for the future.
- Skill Mentor – Identifies areas of support raising where a staff person is weak and effectively trains them to become proficient in both the understanding and the practicality of the needed skills.
- Prepares well for meetings, e.g. review weekly reports, pray, make a plan of action.
- Employs the Warning System as needed while communicating thoroughly with both their own supervisor and the staff member you are coaching.
- Communicates appropriately and regularly with your supervisor regarding your own actions and the progress of the staff person you coach.
- Ongoing Development – Continues to read, learn, and seek development opportunities in coaching, support raising, and leadership.

## **Qualifications:**

- Experienced within your organization and full adherence to the support raising policies and procedures.
- Models personal commitment for his/her own support raising.
- Remains fully-funded.
- Demonstrates the administrative skills to communicate, track and do follow-through with each of the staff you coach.
- Demonstrates the people skills needed in this role to be shepherd, supervisor and skill mentor, e.g. encourages, listens well, communicates clearly, compassionate, caring confrontational skills, cross-cultural sensitivity, etc.

## **Additional Notes / Best Practices**

Part time coaches should have at least three staff they are coaching and spend 4-6 hours per week doing preparation as well as coaching.



## Team Leaders

**Reports to:** The Team Leader report to their regular supervisor with support raising leadership aspects of their job is under the influence of the organizational Support Raising Director.

### **Job Overview: *as it relates to support raising***

The Team Leader is responsible to ensure staff on their team remain fully funded, leads staff to plan for annual ministry expenses, and establishes a positive culture for support raising on their team.

### **Responsibilities and Duties:**

- Monthly check-ups of staff accounts
  - Monthly evaluate your team member's staff accounts to see if they are in the green, yellow, orange or red categories.
- Allocate time for staff to do support raising
  - Discern when and how much time the team needs to focus on support raising both in a weekly and monthly routine. Between two and four hours per week is standard. Also, discern when is the best time for a staff in the orange or red category to take a break from their ministry assignment and focus on getting back to fully funding.
- Set the Pace
  - Maintain quality ongoing habits of personal support raising to keep your own ministry account fully funded.
- Empower the designated support raising person in your organization to help your team
  - Some organizations have a designated Support Raising Advocate on each team. If this is the case, oversee and empower them to best help your team.
  - Some organizations have coaches in a different location responsible for this. Provide them with appropriate times and ways they can best help your team.
- Spot Coaching
  - Most staff need a bit of help from time to time. Help encourage and coach them through these time as well as point them to further resources.

### **Qualifications:**

- Demonstrate the needed administrative and personal skills to have awareness and provide leadership in personal support raising.
- Models personal commitment for his/her own support raising.
- Remains fully-funded.

### **Optional: Team "Support Raising Advocate"**

Some organizations have designated "Support Raising Advocate" on each team who champions the ongoing support raising efforts of the staff. The Support Raising Advocate is not necessarily the team leader and has no inherent role as a supervisor.

This person provides support raising leadership through:

- Being a consistent voice for financial health by keeping support raising as a regular part of a staff's responsibilities
- Regularly presenting support raising ideas, resources and information to the team.
- Provides opportunities to assist the team as they maintain and grow their support as well as grow in their support raising skills.

# Encouragement Partner

**Reports to:** Staff Raising Support

## **Job Overview:**

An encouragement partner is a person outside the sending organization who commits to regularly, prayerfully and intentionally keep a staffer encouraged and motivated throughout the support raising season. This can include the development of an Encouragement Team and Prayer Team

## **Responsibilities and Duties**

- Regularly connects with staffer.
  - A weekly connection point (face-to-face or on the phone) full of godly encouragement and prayer.
  - Additional encouraging communications (text, letter, email, etc.)
- Celebrates successes with the staffer as well as encourages them in areas they are struggling.
- Personal time spent praying for the staffer and their support raising.
  - Ask God for specific verses or prayers to regularly pray over them.

## **Qualifications**

- Responsible enough to be proactive and regular in encouragement.
- Fully supportive of the staffer
- Fully supportive of the staffer joining this organization and doing vocational ministry.
- Fully supportive of raising support as the God-designed means to fund the staffer's ministry.
- Ability to encourage the staffer emotionally and spiritually; able to point clearly to Jesus, His promises, and His truth.

## **Other Notes**

We promote an encouragement partner instead of an accountability partner. People who have not successfully raised personal support are often not helpful as a coach or accountability partner, and their advice can often be counterproductive. It is easier for a trained coach to handle accountability since he/she is responsible for both supervising as well as troubleshooting areas a staffer is struggling in. Encouragement is a role many people are willing and able to play in supporting a staffer getting fully funded. The organization's coach will provide both accountability and encouragement, but staff having people they know who are wholeheartedly in their corner is an incredible strength and confidence builder.

Consider developing an Encouragement Team, which is simply multiple people who will routinely encourage you (perhaps some more often than others) and celebrate with you. Consider a monthly meal or gathering for celebration and prayer.

Consider developing a Prayer Team of people who will regularly and consistently pray for you. Ask key people in that team (perhaps all of them) to pray daily and specifically for you during this season, have them put a reminder on their phones.

# Support Raiser

**Reports to:** Their assigned Support Raising Coach

**Job Overview:**

A Support Raiser mobilizes a team of partners to join with them in ministry through financially and prayerfully support. This is a season of relationship building, vision casting and inviting people into greater commitment to God's Kingdom. Success is raising your fully funded budget in an appropriate time frame, ensuring all of your monthly and special needs are met.

**Responsibilities and Duties:**

Continue developing your walk with the Lord

Complete Training, Orientation and Paperwork

- [Insert your organization's Orientations and Trainings]
- Complete all organizational paperwork, including an approved budget

Weekly Activities

- Minimum of ## (40, 30, or 20) hours per week support raising
- Setting up support appointments
- Having support appointments with contacts at their workplaces, homes or coffee shops, etc.
- Following up with appointments regarding a decision of support
- Helping people logistically start their giving
- Appropriate communication regarding support raising, e.g. newsletters, prayer updates
- Gather referrals
- Maintain healthy spiritual disciplines, a Sabbath rest, and consistent time in God's Word and in prayer

Work with all diligence toward your weekly and monthly goals

- [Ensure an organizational Expectation of Progress as well as weekly goals have been communicated clearly.]
- Weekly and Monthly Goals

Goals / Expectations	Weekly	Monthly
Monetary Goal	\$200	\$800
New Ministry Partners	5	20
Appointments	10	40
Conversations Asking for Appointments	20	80

Reports & Meetings

- Regular face-to-face meetings with support coach (weekly)
- Fill out and submit your weekly report
- Fill out and submit your monthly recap

Have at least one Encouragement Partner

- You can also develop an Encouragement Team and Prayer Team

Adjust your schedule to prioritize support raising

- During this season support raising is your single focus, so excuse yourself from any ministry and non-ministry involvement that might interfere with raising support. It can be hard to step back from leading a Bible-study, teaching Sunday school or community involvement, but the more you focus on support raising the quicker it will go and the sooner you can re-enter personal ministry.

Part-time Support Raisers

- If you are approved to raise support part time, your coach will work with you to adjust your weekly and monthly goals.
- Regarding priorities, it will be even more vital for you not be involved in any responsibilities except for your work and support raising.
- Discuss with your coach when you can or are required to transition to full time support raising.





*[SupportRaisingSolutions.org](http://SupportRaisingSolutions.org)*