

WELS Ministry of Christian Giving (MCG) Christian Giving Counselor Position Description

A form of gospel ministry

The work of a Christian giving counselor (CGC) is part of the Lord's gospel ministry. He helps members of the Wisconsin Evangelical Lutheran Synod grow in the grace of Christian giving (2 Corinthians 8:1-7) and offer Christ-centered major and planned gifts now and at life's end. The goal is to glorify God and share Christ's love through wise use of the material blessings he places into our hands.

Called position

WELS Christian giving counselors and the MCG director are called by the synod's Conference of Presidents (COP). Among its constitutional duties, the COP is responsible for funding the synod's budget and for encouraging the general stewardship life of the synod's membership.

Administrative structure

While the COP acts as the policy-setting body and assumes ultimate responsibility for the Ministry of Christian Giving, the COP manages this ministry through the WELS Ministry of Christian Giving director. Christian giving counselors are directly accountable to the MCG director.

General description of ministry

The Christian giving counselor's primary privilege and task is to meaningfully visit God's people to thank them—with praise and gratitude to the Lord—for their previous gifts, update them on the impact of their prayers and offerings, and encourage them to continue supporting our Savior's work with generous major and planned gifts. While the CGC proactively represents WELS areas of ministry and collaborative partners in his area, he will nurture relationships with his assigned donors and help them in making gifts to the ministries that touch their hearts.

In serving God's people, the Christian giving counselor will participate in periodic group gatherings during which he presents stewardship principles and Christian motivation, information about how to make current/deferred gifts, and opportunities for giving. These events will usually be coordinated with other MCG teammates and as needed area of ministry leaders. People in attendance at these gatherings are given the opportunity to set up personal visits with the CGC. The counselor will assist people with offering current/deferred gifts as appropriate. As the counselor gains experience and becomes known to the people in his area, visits are often requested directly by donors.

The Christian giving counselor nurtures both major and planned gifts. He will receive necessary training regarding various planned giving tools and WELS ministry. Some CGCs will receive further training to help donors plan gifts through their wills.

Goals

Annually, the Christian giving counselor develops a general ministry plan and a nurture plan for each of his assigned donors in consultation with the Ministry of Christian Giving director and other MCG office personnel. That plan will include mutually agreed upon goals for donor service to guide and assess his ministry, thank God for blessings, and seek still better ways to serve. Among those goals are the following:

1. Conduct a minimum of 180 meetings (face-to-face, phone/Zoom) with portfolio donors per year in the following categories:
 - Discovery/qualification
 - Cultivation
 - Solicitation
 - Stewardship (short-term and long-term)
2. Complete a minimum of 40 meaningful e-mail/mail/phone contacts with portfolio donors per month
3. Present
 - 20-40 major gift proposals per year
 - Mid-level gift solicitations as warranted
 - 6-8 group presentations per year regarding Christian stewardship, WELS ministry, or Christian estate planning
4. As requested, assist donors outside one's portfolio with gifts and/or expectancies
5. By the third year of ministry, nurture a minimum of \$2,000,000 per year in major gifts and/or major expectancies for WELS

Education and training

The CGC's initial training includes five days of orientation followed by joint visits with experienced CGCs. The counselors have access to monthly webinars, planned giving periodicals, and other continuing education resources. New counselors are assigned a mentor. Laymen are required to enroll in the synodical non-parish staff ministry certification program through Martin Luther College. WELS MCG pays for that training.

Professional equipment

WELS Ministry of Christian Giving provides the following equipment to its giving counselors:

- A laptop computer. WELS Technology will provide technical support. All WELS policies for computer use are to be followed.
- Reimbursement for a personal smartphone
- Verizon hotspot (or half of your monthly home Internet fee)
- Office equipment: desk, chair, printer/scanner, and anything else needed to establish a working home office
- WELS corporate credit card (through Wells Fargo Bank)
- A WELS-owned vehicle if you drive over 20,000 miles per year. All WELS policies concerning synod-owned cars are to be followed.

Continuing education

The counselors meet face-to-face several times a year for spiritual nourishment, education in principles of Christian stewardship, and continued education in the techniques of tax-wise charitable giving. They also periodically meet by Zoom throughout the year.

Computer literacy

The work of a Christian giving counselor involves daily use of a computer and a variety of computer programs including Raiser's Edge, Microsoft Cloud, Microsoft Outlook, Wells Fargo electronic credit card management, the WELS timesheet system, and the WELS website. Training will be provided during initial orientation with updates being conducted periodically.

Location of ministry

Following mutual consultation, Christian giving counselors are asked to serve in specific areas assigned by the MCG director in consultation with the COP.

Travel

The work of a Christian giving counselor involves considerable travel, including nights away from home. An experienced counselor may log up to 20,000 miles each year. Gatherings and meetings are often presented on evenings and weekends. Visits that result from a gathering generally require several days of follow-up with prospects. If the scheduled visits are 50 miles away or less, counselors are encouraged to return home each night for lodging. In this and in other activity, proper consideration of one's family is a major concern of the MCG director and the COP.

All travel costs are reimbursed. This includes automobile use, rental car, airfare, lodging, and meals.

Reports

Each day, Christian giving counselors enter comments and other information in the Raiser's Edge database regarding the visits/presentations conducted and results of those activities.

Review

Once each year the counselor meets with the MCG director for a review of his work and observation of a donor visit.

Liaison Christian giving counselors

Specific counselors will be asked to be MCG's liaison to areas of ministry or collaborative partners. The liaison work involves the following:

- developing a relationship with the partner's leadership and development departments,
- encouraging coworkers to advocate for this partner,
- working with both the partner's and WELS MCG offices to make sure records are accurately kept, referrals made, etc.,

- working with the partner's development department and WELS MCG in producing literature that is adequate for the partner, and
- making sure the MCG office staff are aware of all current and deferred gifts for the partner.

Additional information

Counselors are asked to set up an office in their homes. Since counselors do not have local secretaries, the MCG staff in Waukesha will provide support for large and special office jobs approved by the director.

If you want to learn more or have specific questions about this position description, please contact Rev. Kurt Lueneburg, director of the Ministry of Christian Giving.

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