**IST 2087 – Financial Management**

**Iliff School of Theology**

**Sample Letter/Email Message Contacting Your Course Project Congregation/NPO**

By the second week (or as soon as possible thereafter), you’ll need to select a congregation or other NPO that is willing to: (i) provide you with key documents that describe its management of financial matters, and (ii) provide opportunities for you to interview some of the key persons involved in these matters, including the pastor or executive director.

You may find the following draft message helpful in making your initial contact with the congregation/NPO that you hope to select. Of course, modify it as you see fit.

Note that the message does not explicitly mention how sensitive financial documents would be handled. I recommend that you discuss this after you’ve made the initial contact and gotten a positive response. If the contact person brings it up, explain that materials would be shared only with the class and instructor unless written permission is granted.

SAMPLE LETTER/EMAIL MESSAGE

Dear \_\_\_\_\_\_\_\_\_\_\_\_\_\_,

I am a graduate student at Iliff (etc.) . . . I am currently enrolled this quarter in a course on Financial Management for church leaders, non-profit organization managers, and for various social and community activist positions.

The main project for the course requires that each student prepare a *financial management profile* of a congregation or other nonprofit organization (NPO). The purpose of this course project is to help students concretely grasp the main concepts, principles, and issues related to financial management in such organizations.

I would like to discuss with you soon the possibility of developing such a profile of \_\_\_\_\_\_\_\_\_\_\_\_ [the congregation or NPO]. This would involve obtaining relevant documents and meeting with some of the key persons involved with financial matters, including Pastor \_\_\_\_\_\_\_\_\_ [or the NPO’s Executive Director].

A brief description of the course and details of my course project requirements are attached. [You’ll need to copy these from the Syllabus.]

I look forward to hearing from you. [OR, I will contact you in the next day or two regarding my request.]

Sincerely,

. . .