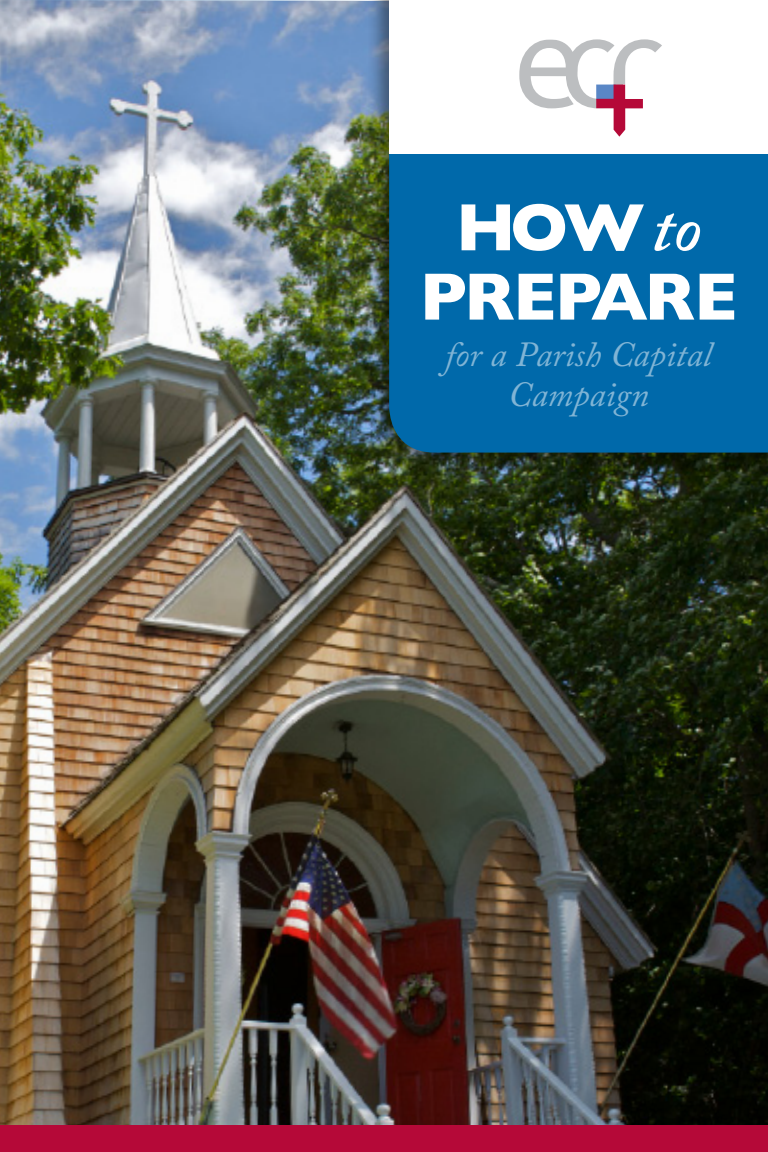




HOW *to* PREPARE

*for a Parish Capital
Campaign*



ECF CAPITAL CAMPAIGNS

Embarking upon a successful capital campaign requires prayer, a clear vision, and the support and involvement of parishioners. A capital campaign is an opportunity to identify new leaders and create opportunities for mission and service. ECF provides a flexible approach to capital campaign consultation, offering a sliding fee scale and the option for either full-time or part-time counsel.

ECF believes that fundraising is a ministry and that holistic stewardship services add value; therefore, capital campaign services include planned giving and annual stewardship direction at no additional cost. *For more information, contact Maurice Seaton, Senior Program Director, Capital Campaign Services, Episcopal Church Foundation, 800-697-2858 or Maurice@episcopalfoundation.org*

This booklet will help you move from vision to fundraising, in ten important steps:

- 1** Remember the Basic Principles
- 2** Identify the Need
- 3** Authorize Exploration; Inform the Congregation
- 4** Create Ownership and Involvement
- 5** Form Committees to Study Options
- 6** Receive Preliminary Report and Develop Next Steps
- 7** Congregational Review
- 8** Authorize a Feasibility Study
- 9** Receive the Study and Make Campaign Decisions
- 10** Consider Using Fundraising Counsel

“And Moses told them, ‘The Lord has specifically appointed Bezalel as general superintendent of the project.’”

—Exodus 35:30-31

EXODUS chronicles the first effort to design, furnish and pay for a church building. Committees today are still struggling to plan, finance and build.

If you are a modern-day Bezalel, the following suggestions will help you avoid some of the turmoil experienced by both Old Testament patriarchs and modern-day saints.

“How much can we raise?” is usually the first question. A rough rule to establish campaign goals is

three- to five-times the annual pledge and plate of the congregation. Beware of such folk wisdom as determination of an appropriate goal is highly dependent upon the individual circumstances and unique situation of each congregation.

ECF has conducted feasibility studies and campaigns for seemingly affluent parishes that could not even raise an amount equal to their annual budget. Others, struggling to balance a budget, have raised amounts ten times greater than their annual pledge and plate offerings!

A congregation’s potential cannot be determined without an accurate feasibility study. If the study does not reveal major gifts, the amount that can be raised is considerably decreased.

1 REMEMBER THE BASIC PRINCIPLES

People give to people. The most effective way to solicit a pledge is through committed individuals visiting peers and stating, “I believe in this cause. I am supporting it financially, and prayerfully. Will you join me in making a gift?”

People give to urgent and compelling causes. They do not give to causes that seem unimportant to them, that are poorly planned or managed, or that are ineffectively communicated.

People support and give to campaigns when they have been invited to provide input and advice before being asked for money.

The following steps explore communication techniques and activities necessary for a successful capital drive. These steps, which we call Discernment (and include planning steps), may be modified depending upon each situation,

but no campaign can achieve its goal without clearly communicating the reasons for undertaking the effort.

2 IDENTIFY THE NEED

Campaigns usually begin when leaders and members of the congregation recognize the need to either:

- **Restore, renew or remodel facilities**
- **Construct new facilities**
- **Address programming or outreach concerns**
- **Build or rebuild endowment to increase or ensure the continued ministry of the parish**
- **Retire debt**

The most common reasons for conducting a capital campaign are to build a new facility or to restore and remodel an existing building. The following guidelines apply to conducting a capital drive for these purposes.

3 AUTHORIZE EXPLORATION; INFORM THE CONGREGATION

Normally, leadership appoints a Capital Needs (Discernment) Committee to explore opportunities. A timeline should be established outlining tasks necessary to deliver a formal report of findings. Inform the congregation of the creation of the Committee and its purpose.

4 CREATE OWNERSHIP AND INVOLVEMENT

“So all the people went to their talents to prepare their gifts.”—Exodus 35:20-21

People’s hearts are best stirred when they are involved in the planning process. Planning must be guided by appropriate lay leaders and clergy; however, proposed projects should belong to the entire congregation.

Committees should involve appropriate parish members. If, for example, a new church kitchen is contemplated, those who use the kitchen should be appointed to the subcommittee.

Significant financial resources are necessary for the success of any campaign. In many campaigns, 70 to 80 percent or more of the total goal will come from about 20 percent of the congregation. Those members of the congregation capable of significant gifts should, if possible, be involved in the planning process.

Projects fail if forced from above without ownership by those who will be asked to approve and contribute to the campaign.

5 FORM COMMITTEES TO STUDY OPTIONS

“Come, all of you who are skilled craftsmen having special talents, and construct what God has commanded us.”—Exodus 35:10-12

Committees should be comprised, in part, of individuals who are knowledgeable about the special purposes of the proposed effort. Opinion makers should be asked to serve. Make a preliminary overview of the more obvious needs. For example, if the need is restoration, a list should be made of visible structural problems, deferred maintenance, damage, etc. Experts should be asked to compile preliminary surveys and cost estimates.

Initially, committee reports are submitted to the Capital Needs (Discernment) Committee. Draft architectural plans are also presented and approved by the Capital Needs

(Discernment) Committee. The Committee then prepares a preliminary report.

6 RECEIVE PRELIMINARY REPORT AND DEVELOP NEXT STEPS

Leadership may authorize architectural plans for restoration and new construction after reviewing the preliminary report. The first estimated costs are projected and funds must be approved.

After review and revision by leadership, the plans should be presented to the congregation, who should be continually informed of all developments.

7 CONGREGATIONAL REVIEW

“Then Moses said to all the people, ‘This is what the Lord has commanded: All of you who wish to, all those with generous hearts, may bring these offerings to Jehovah...’—Exodus 35:4-5

Committees rarely command—participation must be invited. A congregation-wide meeting, additional forums or small group meetings should be held to inform parishioners of the plans. Pray for guidance. Publish the plans in your newsletter, website or bulletin. Display plans in an appropriate meeting place.

Informal feedback from the congregation should be incorporated into the next revision. Major donor prospects must be kept informed.

8 AUTHORIZE A FEASIBILITY STUDY

After further revisions are approved by both the Capital Needs Committee and the leadership, outside consultants should be retained to conduct a formal feasibility study. The feasibility study should reveal the following information:

- **Does the congregation support the plans?**
- **Which parts of the plans are considered the highest priority?**
- **Are members willing to give to the capital campaign?**
- **What potential leadership gifts are available?**
- **Is the financial goal realistic?**
- **When should the campaign be held?**
- **What additional information needs clarification?**
- **Who should serve as campaign chair?**
- **Is Planned Giving (such as bequests in wills or life-income gifts) possible?**

A feasibility study ensures that no one can say in the middle of a campaign, “They did not ask my opinion.” It also helps campaign leadership discover if the goals are realistic.

9 RECEIVE THE STUDY AND MAKE CAMPAIGN DECISIONS

If the feasibility study is positive, the Capital Needs Committee should recommend the appropriate goals and projects to the leadership group. The final decision is then made and a capital campaign solicitation phase approved.

Sometimes the vision is too ambitious, and plans have to be revised. It will take time to review, discuss and make decisions about which parts of the plans to pursue before launching the solicitation for gifts.

10 CONSIDER USING FUNDRAISING COUNSEL

Regardless of the size of the campaign, leadership should consider seeking assistance in conducting capital campaigns.

Even a relatively small campaign (\$250,000 or less) can benefit from outside fundraising consultants. The level of appropriate management oversight varies from congregation to congregation. ECF offers either a part-time consulting model or a full-time service model.

Do not expect a consultant to solicit gifts for your program. It is best and most effective when peers solicit other peers.

Do expect your consultant to organize your campaign calendar, train leadership and volunteers, assist in identifying and evaluating advance gift prospects, coordinate the writing and publication of materials and guide in fundamental decisions such as kick-off events and Celebration Sunday.

“The workmen told him, ‘We have more than enough materials on hand now to complete the job!’ So Moses sent a message throughout the camp announcing that no more donations were needed.”—Exodus 36:1-7

MOSES, Aaron and the people of Israel spent considerable time in the wilderness planning their portable place of worship. When it was time to raise the “resources” necessary to build and furnish the Tabernacle, individuals were ready to respond. Consider their example!

Like Moses, make people *aware*. Get them *involved*. Then, they will have ownership of the campaign and will give generously.

ECF provides comprehensive fundraising resources that empower congregations and other organizations to develop financial resources for ministry. Our services can be tailored to your specific situation and our experience is solid. Regardless of your size or location, we have the resources and flexibility to serve your needs.

Please call us at 800-697-2858 or visit our website at www.EpiscopalFoundation.org to learn more about how we can assist you in pursuing your mission and ministry.



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