

# HOW TO PREPARE *for a* PARISH CAPITAL CAMPAIGN



**THE MISSION** of the Episcopal Church Foundation is to strengthen the leadership and financial capabilities of Episcopal congregations, dioceses, and related organizations to pursue their mission and ministry. Our programs, products and services include:

- A full array of fundraising resources for capital campaigns (including discernment, feasibility study and gifting), planned giving, annual stewardship, and endowment management
- Practical information and advice on managing day-to-day parish operations in *Vestry Papers* and *Vestry Resource Guides*
- Academic and transformational ministry fellowships through the Fellowship Partners Program

ECF is here to strengthen and support you and your congregations in your journeys of faith, service and mission.

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

- 1** Remember these Basic Principles
- 2** Recognize the Need
- 3** Authorize Exploration; Inform the Congregation
- 4** Create Ownership and Involvement
- 5** Appoint Subcommittees to Study Possibilities
- 6** Receive Preliminary Report and Authorize Next Steps
- 7** Hold Congregational Review
- 8** Authorize Feasibility Study
- 9** Receive the Study and Make Campaign Decisions
- 10** Consider the Use of Professional Management

*“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 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 used to be an amount that was two to three times the annual pledge and plate of the congregation. Beware of such folk wisdom.

Our program 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 five to 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 chance of raising an amount more than twice the annual budget is considerably decreased.

## **1 REMEMBER THESE 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 considering 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.

The following steps explore communication techniques and activities necessary for a successful capital drive.

These steps, which we call Discernment, may be modified depending upon each situation, but no campaign can

achieve its goal without clearly communicating the reasons for undertaking the effort.

## **2 RECOGNIZE 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 endowment to increase or ensure the continued ministry of the parish**

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 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 through newsletter articles, bulletin inserts and announcements from the pulpit.

### **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 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 30 percent or less 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 APPOINT SUBCOMMITTEES TO STUDY POSSIBILITIES**

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

Subcommittees should be comprised, in part, of individuals who are knowledgeable about construction and/or any of the special purposes of the proposed effort. Opinion makers should be asked to serve.

Subcommittees 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 make preliminary surveys and cost estimates.

Initially, subcommittee reports are submitted to the Capital Needs Committee. Draft architectural plans are also

presented and approved by the Capital Needs Committee. The Committee then prepares a preliminary report.

## **6 RECEIVE PRELIMINARY REPORT AND AUTHORIZE 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 any and all developments.

**7****HOLD 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 or bulletin. Display plans in the narthex or other appropriate meeting place.

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

**8****AUTHORIZE  
FEASIBILITY STUDY**

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

- Is the congregation supportive of 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 should be shared?
- 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 program approved.

Occasionally 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. Allow time for this process to occur before launching the solicitation for gifts.

## **10 CONSIDER THE USE OF PROFESSIONAL MANAGEMENT**

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

Even a relatively small campaign (\$250,000 or less) can benefit from outside consultants. The level of appropriate management oversight varies from congregation to congregation.

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.

*ECF's Giving Services 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.*

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CHURCH FOUNDATION  
**Learn. Lead. Give.**

815 Second Avenue  
New York, NY 10017  
800-697-2858

*[giving@EpiscopalFoundation.org](mailto:giving@EpiscopalFoundation.org)*  
*[www.EpiscopalFoundation.org](http://www.EpiscopalFoundation.org)*