



How To Plan a Parish Capital Campaign

Insights from 25 years experience
and over 200 capital campaigns



Presented by:



Hello!

Denis Greene, CFRE

President and CEO

30 Years Experience

Author of “The Stewardship System”

Miracle survivor, husband, father, innovation nerd





Founded 1992

*Our mission is to increase generosity without fundraising.
Over 200 churches served, over \$200 million into ministries.*

www.church-development.com



Q&A Instructions

At any time in the presentation submit your questions via the Q&A tab on your Zoom menu.



Introductions

Please share in the Q&A section:

1. Something wonderful that God has given you.
2. What you want to get out of today's webinar.

Agenda: How to plan for a parish capital campaign

- What is a capital campaign?
- Case Studies
- Step #1. Consensus on the vision and financial needs
- Step #2. Culture of stewardship
- Step #3. Feasibility study
- Step #4. Leadership Team
- When to conduct a capital campaign, or not
- Next steps

What is a capital campaign?

- Special needs, facility, debt, infrastructure
- Raise 250% of annual giving in three year pledges
- It has a beginning and an end
- Costs < 10% of funds raised
- Takes six months
- 5 year cycle
- Annual giving and planned giving impact

Case Studies





Oglethorpe Presbyterian Church
The community is our congregation.

Sunday Schedule

9:45 am: Sunday School: all ages
11 am: Worship
Fellowship Follows

[Worship](#) [About Us](#) [Visiting](#) [Ministries](#) [Preschool](#) [Stewardship](#) [Pastoral Search](#) [Contact](#)



Welcome to Oglethorpe Presbyterian Church - Find out more about us, our values, and our community.

Christmas Eve Sunday Morning Worship
11am on 12/24/17

Christmas Eve Candlelight & Communion Service
5pm on 12/24/17



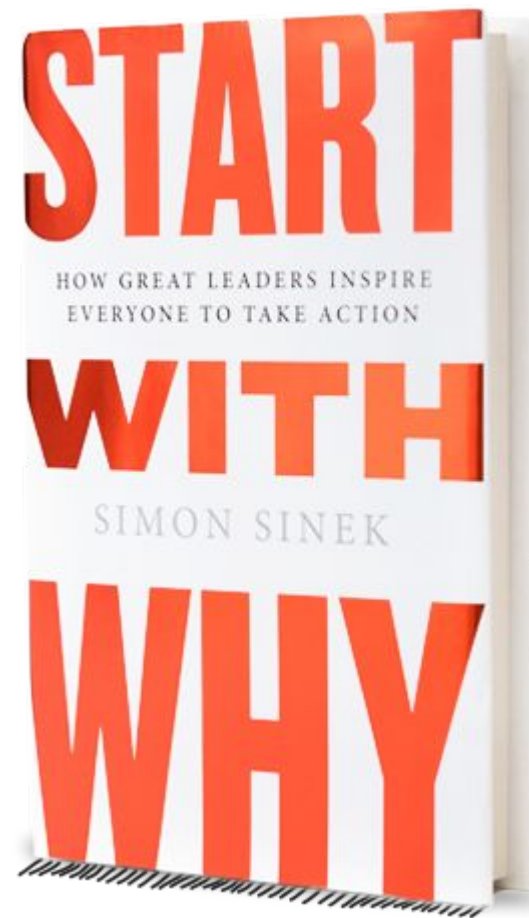
How did you plan/prepare for a capital campaign

1. Consensus on vision
2. Culture of stewardship
3. Feasibility study
4. Leadership Team

Consensus

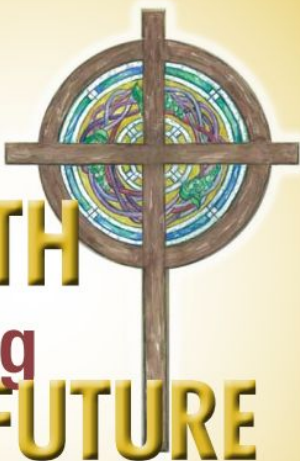


Start with “Why?”




Oglethorpe Presbyterian Church

Oglethorpe Presbyterian Church



**Living
IN FAITH
Building
OUR FUTURE**




2013-15
CAPITAL CAMPAIGN

2013
ANNUAL STEWARDSHIP DRIVE

3016 Lanier Drive • Atlanta, Georgia 30319
404.233.5469 • www.opcbrookhaven.org

Oglethorpe Presbyterian Church

Through the Years



THANK YOU
*to All Who Gave
of Their Time & Talent*

Pastor
The Rev. Marthame Sanders
Office Manager & Director of Christian Education
Cheryl Hartman

Campaign Co-Chairpersons
Jean Cox & Paul Reynolds

Prayer Team
Team leaders: Jeff Chance & Linda Hawthorne
Members: Ingrid Kelly, Linda Morris,
Eleanor Timmons & Elizabeth Sanders

Communications Team
Team leaders: Julia Berry & Bill Cox
Members: Cindy Alexander, Anna Coulter,
Jim Coulter, Mary Ann Hawthorne,
Tamara Lopata, Marilyn Peatman, Brian Pierce,
Cathy Polay & Mike Polay

Events Team
Team leaders: Amy Chance & Emily Tenter
Members & Helpers: Cindy Alexander,
Eleanor Davis, Linda Jones, Margi Jones,
Ingrid Kelly, Mark Kelly & Paul Reynolds

Children/Youth Team
Team leaders: Mark Kelly & Donna Poedison
Members: Christi Kelly, Trent Lopata
& Holly Pearce

Thanks Team
Team leaders: Samantha Casidy &
Georgia Gunter
Members: Betty Dalziel, Carol Moore,
Linda Morris & Jennifer Stearns-Allison

Ambassadors Team
Team leaders: Charles Hawthorne
& Michael Lopata
Members: Bill Coble, Donavon Graves,
Jeff Morris, Pat Morrison & Diane Powell

Worship Team
Kay Cabrett, Eleanor Davis, Mary Ann Hartman
& Virginia Quillian

Management Team
Marthame Sanders, John Gunter,
Cindy Alexander, Pat Morrison, Jamil Zainuddin
& Edward Debneyer

Stewardship Committee
Includes all campaign team leaders,
Management Team plus Steve Allison,
Barbara Bohmer, Bill Bohmer, Brandon Casidy,
Cheryl Hartman, Margi Jones, Ingrid Kelly,
Barbara Linder, Cortlandt Minnich,
Nancy Minnich, Carol Moore, Marilyn Peatman,
Kraus Stephenson & Carl Tenter

Stewardship Committee
Chairperson: Cindy Alexander
Member: Geoff Stephenson

1949 Oglethorpe Presbyterian Church organized

1950 Fitz Legerton preached first sermon

1951 Chapel completed

1957 Education building added

1967 Main sanctuary and office wing completed

1978 AMIS formed

1982 Bargain Basement initiated

1988 Chapel renovated

1992 Fitz Legerton retired

1993 Rod Stone became pastor

1996 Sanctuary renovated

1999 OPC 50th anniversary

2001 Richard Floyd became pastor





2003 Fellowship Hall updated

2005 Marthame Sanders became pastor


2009 OPC 60th Anniversary

2010 Food Pantry relocated to Suthers Center

2012 *Living in Faith, Building Our Future* campaign begun

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Capital campaign consulting and brochure creation by Church Development, www.church-development.com.

General Facility Plans

- Approximate costs
 - Facilities 90%
 - Outreach/marketing

Our Plan for Building Our Future

Your responses during the Feasibility Study indicated strong support for a Capital Campaign to address needed repairs and upgrades to our facility. You also ranked Outreach as your number four priority for OPC.

Our campaign leadership and Session have looked closely at the Feasibility Study and our immediate needs. As a result, the following plan is now in place with the first four items set to begin as soon as practicable.

Replace the Sanctuary roof. Look up at this roof, and you will notice missing or lifted shingles. This roof was rated for 15 years and is well beyond its life span. The good news is that our other roofs are in good condition. Replacing the Sanctuary roof will be done as soon as sufficient pledge payments are received. Project cost: \$18,000.

Upgrade the HVAC. Like the roof, much of our HVAC system is on its last leg as demonstrated by frequent failures in both the heating and cooling systems. We are still in the process of meeting with several companies to determine the best and most efficient system of replacement and upgrade. Project cost: \$110,000.

Replace the glass entrance doors. We face two challenges regarding this project: 1) replacement parts are no longer available for our current doors, and 2) the doors are no longer secure. We need to make sure our building is secure, and ensure the safety of preschool children, staff and all our visitors. Along with new doors, we will have a new security system with keyless entry and remote entry access to allow OPC staff to unlock the doors for visitors. Project cost: \$8,500.

Restroom upgrades. We have no universally-accessible restroom in our facility which is especially a problem when we have visitors with disabilities. We will install a universally-accessible family restroom on the Sanctuary level. We are also planning upgrades to other restrooms. These upgrades will be contingent on the location of an elevator. Project cost: \$40,000.



The total estimated costs of all our projects are:

Replace Roof	\$ 18,000
HVAC Upgrade	\$110,000
New Doors & Security System	\$8,500
Restrooms	\$40,000
Front Entrance	\$170,000
Elevator	\$75,000
Outreach, 3 years	\$60,000
Kitchen	\$10,000
Other/Contingency	\$10,000
TOTAL	\$602,500
Fundraising expenses*	\$52,000
TOTAL EXPENSES	\$655,000

* Feasibility Study consulting on Capital Campaign and Annual Stewardship Drive. OPC expenses



The following items are not yet prioritized, and the order in which they are done will be contingent upon available funds. It is important to remember we are still meeting with our architect, a contractor and county planning officials.

Elevator. We are currently obtaining estimates from several elevator companies, working with our architect and scheduling meetings with county officials who must approve the location, installation and capacity of any elevator. Estimated project cost: \$75,000.

Outreach. In the feasibility study, OPC members ranked "outreach to bring more visitors to consider membership at OPC" as our fourth priority. Just as the rest of the campaign believes our ability to open our doors to the community, we also want to invest in people as we improve our capability to reach out to potential members of the OPC community. Session will oversee this project, set quantifiable goals and regularly report to the congregation. Estimated Project Cost: \$60,000.

Kitchen. Presently, our kitchen is underused because of plumbing problems and the general design of the space. Plans are being developed to reconfigure the kitchen as well as upgrade plumbing and install a hot water heater and dishwasher. A general facility is also planned. Estimated project cost: \$10,000.

Front Entrance. The design of a main entrance from our front lawn is still a work in progress. We are working with the architect, and have identified several contractors to consult regarding site development and construction. Estimated project cost: \$170,000.

Culture of Stewardship

- Annual campaign
- Stewardship education
- Lay speakers
- Information flow
- Pledges increase
- \$ increase

Oglethorpe Presbyterian Church

Feasibility Study Report

for

Oglethorpe Presbyterian Church



3 West 63rd Street, Kansas City, MO 64113
www.Church-Development.com

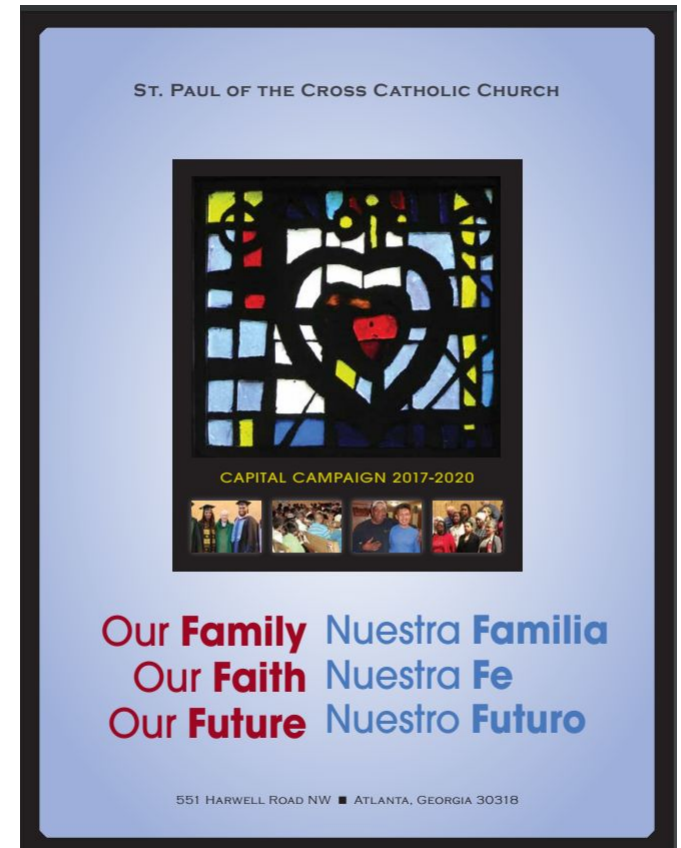


The Dream Team



St. Paul of the Cross

- Cultural and language challenges
- Unique strategies to prepare
- Reaching consensus on:
 - vision
 - feasibility study
 - stewardship culture
- What our success looked like



Let's shift to apply this to your church: What does the timeline look like?

- Culture of stewardship - year round
- Visioning consensus facility needs - 1 month
- Feasibility study - 2 months
- Capital campaign - 4 months
- Follow up - 3 years of annual campaign assistance
- Planned giving effort - annual event

Before You Start: Culture of Stewardship

A culture of stewardship includes...

- A stewardship team
- Annual stewardship campaign
- Stewardship speakers - lay people
- Engage in decision making
- Episodic volunteer opportunities
- Social activities



Communication: Your Information Flow

- Bulletin
- Announcements
- Lay speakers
- e-Newsletter - Weekly!
 - Constant Contact
 - Survey Monkey
 - Get everyone's email address now
- Video blog by pastor
- Annual report

Before You Start:
Vision consensus and
Financial needs clarity

How to Reach Consensus on the vision

- Vision/strategic plan/master plan
- Minimum 1 one hour session and 12 months of weekly meetings
- Facilitator
- Committee
- Town hall meetings
- Survey
- Newsletters



Vision Metrics

- Attendance up by 200
- Start new youth ministry
- Hire a youth minister
- Build a gym and youth room cost of \$1M

Before You Start: Feasibility Study

Diocesan Approval for Feasibility Study

- Proposal for Feasibility Study
- 30 interviews
- Mail out to all 1000
- Report with recommendations and forecast

**Holy Trinity Catholic Church
Feasibility Study**

EXECUTIVE SUMMARY

This report represents the information collected in the survey as of January 27, 2017. As of that time, 267 parishioners had participated in the study which is a normal participation level for a Feasibility Study. The money offering and volunteer data were updated on January 30, 2017, to provide the most current information available. The survey remains open, and this report will be updated once the survey closes and all the data is processed.

Executive Summary:

1. Eighty-eight percent (88%) of those in the study agreed or strongly agreed that Holy Trinity is effective in meeting their spiritual needs. The average percent positive collected from past Church Development Feasibility Studies for this question is 81%.
2. Eighty percent (80%) of the respondents agreed or strongly agreed that Holy Trinity is effective in meeting their social needs. The average percent positive collected from past Church Development Feasibility Studies for this question is 80%.
3. Seventy-three percent (73%) of those in the study have a high level of confidence in parish leaders to make wise decisions regarding the future of the church. The average percent positive collected from past Church Development Feasibility Studies for this question is 79%.
4. When asked to rank the most common themes from the fall 2016 Town Hall meeting, respondents top two choices were 1) eliminate the \$3.9 million debt and 2) invest in more educational opportunities for youth and young adults.

Answer Options	1	2	3	4	5	6	Response Count	Percent Positive (1+2)
Eliminate the debt	109	37	30	21	15	16	228	64.0%
Invest in more educational opportunities for our youth and young adults to strengthen their Catholic faith for day to day living. Continue to invest in our school.	55	73	27	24	21	6	206	62.1%
Invest more in spiritual growth by providing more coordination of Faith Formation activities, small group Bible studies and large parish-wide events.	23	31	43	35	37	23	192	28.1%
Provide more resources to coordinate volunteers for ministry, service and outreach.	14	33	36	58	33	20	194	24.2%
Provide more resources for communication about parish activities and Catholic issues.	13	28	36	29	49	49	204	20.1%
Allocate more funds for the Brazilian Sisters to strengthen and expand our ministry to the homeless in Kansas City, KS	10	15	38	30	39	78	210	11.9%

Holy Trinity - Feasibility Study Recommendations

Detailed Recommendations

Holy Trinity should immediately begin a three-year Debt-Reduction Campaign with a Commitment Weekend in late May 2017.

The campaign should focus on prayer, stewardship and be a discerning implementation of God's will.

A high level of membership involvement should guide the process. All parishioners, especially new parishioners, should be encouraged to serve on a campaign team (Prayer, Events, Thanks, Youth, Ambassadors, Communications, Steering Committee or Management Team – each team meets 3 – 4 times during the campaign).

Every attempt should be made to promote 100% participation of Holy Trinity members in the life of the parish, encouraging parishioners to give of their time, talents, and treasures.

A high level of information sharing should flow through the campaign weekly through newsletters, bulletins, text messages, website, e-mails, social media and announcements.

Weekly communication on every aspect of the campaign should be planned.

The donation of property, stocks and bonds should be part of the campaign effort.

Potential top donors should be approached during the campaign through one-on-one visits.

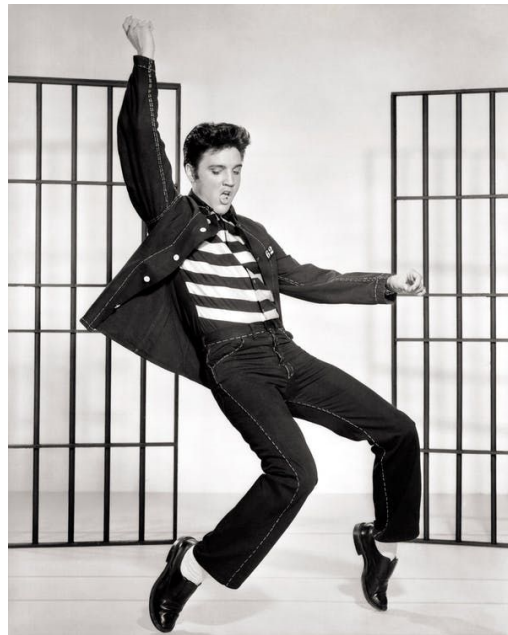
Emphasize the sacrifices that have been made in the past by parishioners.

Concerns that arose during the Feasibility Study should be addressed thoroughly through the campaign communication and opportunities for dialogue.

In order to meet the needs of the church, the campaign should follow the proposed calendar in this report.

Years 2017 to 2020: Fulfilling pledges, tracking pledges and inviting new members to participate. Church Development assists the church with Annual Stewardship Campaign and Planned Giving effort during the three years of follow-up.

Diocesan Approval for Capital Campaign



Before You Start: Leadership Team

Leadership/Management Team

- Senior pastor
- Church business administrator
- Parish council leader
- Consultant
- Big picture thinker
- Optimist not pessimist
- Meet regularly
- Oversee both policy and details

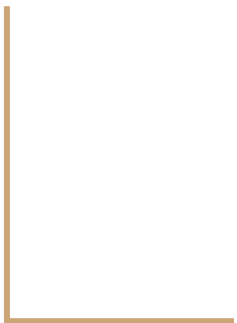
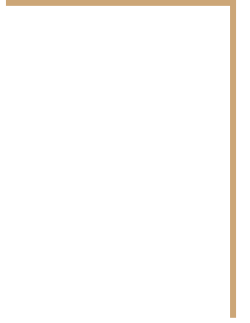
Is Now the Right Time for
a Capital Campaign?

Hiring a Professional Firm to Help

Consider:

- Comprehensive or coaching level of service
 - Staff/volunteer resources available
- Experience
- A good fit - personality and approach

Questions?



Next Steps

- Subscribe to the Stewardship System, free
- Team assignment: Read The Stewardship System book
- Get the guide “How To Plan for a Parish Capital Campaign” free

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