

VESTRY PAPERS



EPISCOPAL
CHURCH FOUNDATION
Learn. Lead. Give.

To inform, inspire and affirm Episcopal vestries in their work

WISDOM FROM A WARDEN *Involve the WHOLE Parish*

by George Olmsted

The most important lessons learned in our capital campaign? *Total parish involvement is key, as is sustained, enthusiastic leadership by the vestry and rector.* Go through the planning, architectural and development processes in the proper order and with the whole parish. There can never be too many communications. The process is slow, deliberate...and exciting! Vestry and clergy involvement is essential — as is professional consultation.

At St. Christopher's Church in Chatham, Massachusetts, where I am the senior warden, our current capital campaign is just one chapter in a long but exciting story of growing in faith. One month into the campaign with a goal of \$4 million, we're halfway there.

By the time we are finished, we hope to be able to enlarge our sanctuary seating by

more than 40 percent; allow handicapped access to all floors of our buildings; improve our outreach space such as our food pantry and consignment space; expand our classrooms and meeting rooms for education of children, youth and adults; cluster our staff offices; and modernize our electrical, telecommunications, audio-visual, HVAC and fire suppression systems.

Name strengths and weaknesses first

At the turn of the century we initiated a strategic planning committee of fourteen parishioners (including the rector, of course) which spent almost two years following the same planning process used in large corporations. We analyzed our current situation. We visited with other congregations and discussed with them what was going well and what was not. We called out our strengths and our weaknesses.

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What are some mistakes made by congregations when it comes to capital campaigns? We asked Glenn Holliman, vice-president of Giving Services for the Episcopal Church Foundation, to name some common pitfalls.

Ten Dumb Things

**It's our anniversary (50th, 100th).
Let's raise some money!**

Truth: Parishioners won't give large gifts for anniversaries. They give for urgent and compelling needs. There are 1.5 million non-profits in the U.S. — being the church does not ensure donations.

Until our project is finalized, the vestry will keep the capital needs plans under wraps.

Truth: Leadership must invite the congregation into the process and keep parishioners involved in the emerging vision. Unless the vestry intends to give all the money themselves, they need to invite others to take ownership.

**We have 100 givers in our parish.
If everyone gave \$3,000, we could raise \$300,000.**

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The first capital campaign recorded in the Bible — by Moses and Aaron to build a new tabernacle (Exodus, chapters 35 and 36) — received such an abundance of gifts that “the people had to be restrained from bringing more.” We should all have such campaigns! Here our writers explore their experiences with discernment, feasibility and gifting — the three essential steps in raising money for mission and ministry.

**This Issue:
Capital Campaigns**



Involve the *WHOLE* Parish

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Then we started looking forward...where did we want to go? More interviews with ministry leaders and more introspection developed a laundry list of directions. Then we selected and prioritized from that list to develop specific action plans for worship and music, pastoral care, education, fellowship, outreach, leadership and facilities. We published a document, "Design for the Future," and provided a copy for every household.

In 2003 a building planning committee began to tackle the major plan...renovation and expansion of our buildings, especially our jam-packed sanctuary. We spent many months interviewing and listening around the parish to build our needs assessment, centered on what St. Christopher's needed for the foreseeable future.

Get professional advice and follow it

In conversations with other Episcopal churches on Cape Cod I was advised, firmly, not to do it alone. "Get professional architectural and development advice and consultation," they all said.

Our building planning committee interviewed five experienced church architects and selected one. Schematic architectural designs for renovations and additions were developed with the committee and presented to the parish at well attended forums...most everyone knew what was going on and was part of the input. We continue to get good ideas from our caring parishioners.

The next step was to plan our fundraising. Again our capital campaign committee interviewed five development consultants experienced with church campaigns. A feasibility study was made with fifty-five live interviews by a consultant plus about 110 responses to surveys (a phenomenally high percentage return). Over 90 percent of responders were in favor of renovation and expansion, and most said they would support it financially.

Keep on top of the details

We followed our consultant's advice to the letter to guide us through the campaign process: committee organization (complete with job descriptions), printed campaign materials, spiritual emphasis, newsletter communications, caller recruitment and training, computer record management, computer-generated communications to all participants, parish-wide social events.

When we have completed our campaign, our architect will work with a selected contractor to develop designs to match our budget, and we will look forward to groundbreaking and construction. We have exciting years behind us and also just ahead.

Clergy leadership is essential

Our rector, with a marvelous vision, has been our leader throughout the growth process. He serves on our planning and development committees to offer his views on the topics at hand plus guidance, opinions and recommendations from his experience. His enthusiasm and encouragement is infectious in addition to these efforts with the total parish.

Vestry members are ambassadors

Over the years, vestry involvement with our growth planning has been extensive. Many vestry members have served on the related committees. Every vestry member guided tours of our "before" facilities following all services for five consecutive weeks in 2005, and many parishioners walked around and saw spaces they did not know existed. The vestry tours formed the preface for our several parish forums with our architect to describe our "after" designs for renovation and expansion.

Vestry members have been ambassadors to the parish all the way through this process. Vestry members, and, of course, our rector have written many articles about our plans in our monthly newsletter over recent years. All vestry members are callers for the capital campaign now underway. In addition to all those communications efforts, our vestry has been fiscally responsible, as required, by reviewing and approving expenditures for growth planning and consultant fees.

Retired businessman and current senior warden of St. Christopher's Episcopal Church in Chatham, Massachusetts, George Olmsted has been a member of St. Christopher's since moving to Cape Cod some twelve years ago. Having served on several of the committees working to help the capital campaign be a success, his goal is to "keep the place welcoming and exciting for all ages."

"For which of you, intending to build a tower, does not first sit down and estimate the cost, to see whether he has enough to complete it? Otherwise, when he has laid a foundation and is not able to finish, all who see it will begin to ridicule him, saying, 'This fellow began to build and was not able to finish.'"

Luke 14: 28-30

Discernment: The first step

by Andi Tilmann

Discernment n. A process whereby needs are recognized, identified, and communicated.

A successful church capital campaign is conducted in three stages: discernment, a feasibility study and finally the “gifting” phase; each building a strong foundation for the one to follow. The process of discernment calls a congregation to respond together to the all important question: *What is God calling us to accomplish?*

With that vital question always and prayerfully guiding the process, good discernment involves:

Identifying your ministry’s needs, both physical and programmatic

Involving others to suggest and examine those needs in detail

Communicating a resulting collective vision for your ministry

Involve everyone in the process

People give to people, not to buildings. People give most generously from their hearts, and people’s hearts are best stirred when they are involved in the planning process and feel a sense of ownership in the project.

Your capital campaign’s success will have its foundation in providing good discernment, right from the beginning. The good news here is that this process often presents one of the best to come along in decades for opportunities reflection, fellowship and the collective furthering of your ministries.

Discernment involves two basic stages — one, the background activity of information gathering, followed by sharing that information with the congregation via a comprehensive communication strategy. The importance of good communication cannot be overstated.

Start with the mission statement

First, try dusting off your congregation’s mission statement. Is it still relevant and inspiring to your current church family? Is it still being realized by your ministries, programs and physical plant?

Next, conduct an organized effort allowing each of the ministry groups within your church to dream a little. Create a means to capture their dreams and needs. You don’t have to promise anyone anything — just *listen*. Are their ministries being supported or thwarted by your current situation? Are they able to do what God is calling them to do? How could their ministries be enhanced by proposed projects? It is amazing how many ideas arise from just this exercise.

Consider the whole picture

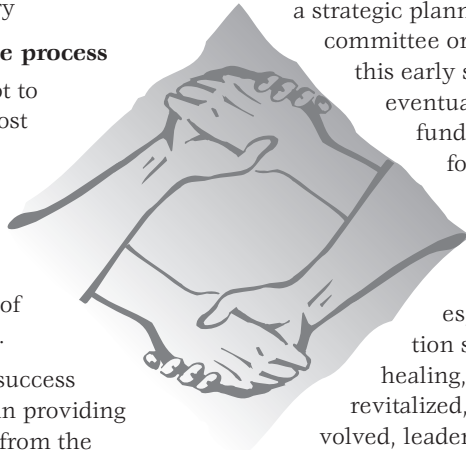
Discernment offers a great opportunity to take stock, and to increase cooperation, fellowship and efficiencies. Prayerfully consider the whole picture of your congregation and its ministries, and find ways that you can work together to accomplish them.

You will still need to “do your homework,” as a strategic planning committee, building committee or vestry. Due diligence at this early stage indicates your eventual good stewardship of the funds that you will be asking for later.

Guide the process

As a direct result of the discernment processes, I regularly see inspiration sparked, relationships healing, ministries discovered and revitalized, newcomers getting involved, leadership appreciated, talents recognized and offered, and faith renewed. Who knew so much good fun could come from the dreaded task of raising money?

Andrichelle Tilmann is currently the principal consultant for the Episcopal Church Foundation’s Partnership Program serving the Diocese of New York. She works with nearly two dozen churches in New York and New England and has spent the last eighteen months on the road, assisting congregations in all phases of capital campaign fundraising.



The Episcopal Church Foundation and the Union of Black Episcopalians have formed a partnership to develop financial, informational, and leadership resources to empower UBE congregations for mission and ministry. Together ECF and UBE will engage in transformational ministry in the church, focused on multicultural issues.

Ten Dumb Things

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Truth: Donors give from current income and accumulated assets. Their ability to give depends on a variety of factors including capacity and commitment.

We don't need a feasibility study. Let's just start asking.

Truth: The only way to insure everyone has a say is a feasibility study in which all parishioners are asked to express an opinion about the projects and indicate their willingness to give or not give to a campaign.

Brochures are expensive. We don't need them (or we'll do them ourselves).

Truth: Even in the age of the internet (yes, post your campaign on the church web-site), a professional but not extravagant document is needed to describe your goals. The parish leadership may understand the campaign, but not everyone has been as close to the work. Invest in appropriate materials and don't let them be homemade or your gifts will be less.

Personal calls are not necessary. Let's just mail everyone a letter.

Truth: The most effective asking occurs one-on-one. Peers should invite each other to join them in giving.

Deadlines aren't important.

Truth: Deadlines are critical. Pledge cards are distributed to workers. To insure completing

the campaign in a timely fashion, the cards must be tracked. One-third of the workers normally fail to complete their calls. It is critical to have regular report meetings and to reassign cards if not finished. Have a closure date or human procrastination will take over.

Spending money on a consultant is a waste. We can do it ourselves.

Truth: Parishes need the outside facilitator to conduct the discernment, feasibility study and gifting process. How much assistance is needed is another story. If leadership is strong, mentoring or reduced service might be in order for the gifting phase. Get it right and get help.

We can't combine annual giving and a capital campaign.

Truth: Both can occur at the same time if the congregation is forewarned and if workers ask for the annual pledge first. Then and only then, ask for the capital commitment.

We are the church. We don't need to say thank you.

Truth: Because we are the church we must say thank you. Thanksgiving for the blessings of life and generosity is part of who we are. It is critical to have regular report meetings and reassign cards if needed. All gifts to a campaign must be acknowledged, celebrated and appreciated.



*Katharine Jefferts Schori, 52, was elected the 26th Presiding Bishop on June 18th and is the first woman to hold the office. Consecrated bishop of Nevada in 2001, Bishop Schori has also written for *Vestry Papers*. Her most recent article was titled "When Conflict and Hope Abound" (March/April 2005; also included in *Doing Holy Business: The Best of Vestry Papers*).*

Hello, New Vestry Members!

Ever wondered just what vestry members are supposed to do? Or the best way to welcome newcomers? Or how to stay spiritually centered? *Doing Holy Business: The Best of Vestry Papers* explores those issues and more including:

- Church Growth
- Spiritual Leadership
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- Roles and Responsibilities of Vestry Members
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*Next Issue:
Change in
Congregations*

WISDOM FROM A RECTOR

Keep the Vision Simple

by Stephen Casey

"Then the Lord answered me and said: Write the vision; make it plain on tablets, so that a runner may read it. For there is still a vision for the appointed time; if it seems to tarry, wait for it; it will surely come, it will not delay." (Habakkuk 2:2-3).

Many years ago I heard a sermon preached on the above text at a seminary graduation. Little did I know then, but years later as rector, I would find myself using this same passage to encourage the leadership in my parish in the midst of a capital campaign. I was sure God in Christ had a vision for us, even though at the time things might not have been unfolding quite as planned.

By their nature capital campaigns involve raising large amounts of money, so the average parish priest and church leadership can expect to experience a wide range of emotions. People can get excited if a capital campaign is a natural response to parish growth. On the other hand, they can be anxious — especially over the ever-present worry of whether the campaign will divert giving away from normal stewardship patterns.

Write the vision and make it plain

I offer the following words of encouragement to any priest and parish leadership that is contemplating a capital campaign: It is hard work; often stressful, and even frightening at times; but it can be fun and grace filled. *Write the vision; make it plain*, and keep it in front of yourself and your parish all the time.

St. Edward's is a twenty-five year old congregation in Lancaster, Pennsylvania. We are a pastoral size parish currently negotiating the transition to program size. About five years ago, when it became obvious that the single parish hall was no longer adequate for our needs, I invited the congregation, with help from the diocese, to explore our history and dare to "write the vision" for the future. What emerged was a need to hire an additional full-time priest and to build a new parish hall with full kitchen facilities.

With diocesan help, a seminary graduate was employed full-time, and we engaged consultants to help design the campaign itself. Over the next eighteen months, we designed a strategy and articulated building design objectives. A building committee was formed; the core leadership for the campaign

chosen. As rector I saw my role as helping all the different voices in the congregation be heard; keeping the vision before the people; acting as a resource for leadership; and above all, providing spiritual support for everyone involved.

A stalled campaign

Given the demographics of the congregation the initial feasibility study suggested that we could reasonably expect to raise \$390,000. The architects developed a design objective acceptable to the parish and things seemed to be running smoothly until three unrelated issues combined to stall the campaign.

In spite of a diocesan grant, almost from the beginning it was apparent that the operating budget of the parish was going to be hard pressed to support two full-time clergy. We were forced to release the full-time assistant two and a half years into her ministry. Then, on the point of publishing the case statement which would officially launch the campaign, we were informed by the architect that the estimated costs of the project would be three times higher than the feasibility study indicated. At that point the consultants advised that we stop the campaign. Then came the decisions of General Convention of 2003.

Write the vision; make it plain; if it seems to tarry, wait for it; it will surely come. Over the next few months we had to negotiate feelings of disappointment at the loss of a much loved staff member, frustration at the stalled building project, and confusion and anger at the consequences of General Convention. Again, as priest and pastor, I saw my role to help the parish through the grieving process, to seek clarity for the building project, and in the midst of challenging times, help us all keep the vision.

Progress is made

Through parish meetings, focus groups and parish wide surveys, the building project was scaled down to meet the expectations of a revised feasibility study. Early the following year, the vestry voted to re-launch the campaign based on the revised vision. Additional leadership was chosen. The capital campaign proper began in the spring of 2004. By midsummer we had reached our goal of \$330,000. We broke ground in the spring of 2005, and the new parish hall, with



Some facts: Most major gifts (but not all) come from people fifty-five and older; the average capital campaign is about \$500,000; the three most challenging places to do campaigns are start-up churches; suburban parishes and those congregations that have gone twenty years or more since their last campaign. Suburban churches are particularly challenged because they have many "thirty or forty-somethings" with limited ability to make major gifts and yet often have the greatest need to expand facilities.



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Keep the Vision Simple

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commercial kitchen, was dedicated by Bishop Creighton that autumn.

What are the teachings from this for the parish priest or leadership? Do not do it alone. Use the skills of the diocese, especially congregational development specialists to help you articulate the "vision." Employ a capital campaign consultant(s). They will not only "walk" you through the process; their experience will help you anticipate problem areas and avoid mistakes. More than anything else, the consultants will keep you on task, and save you money.

Choose your campaign leadership well, and support and encourage them. Communicate, communicate, and communicate what you

are doing and why to parishioners, and provide opportunities for them to be part of the process. Above all, as God told our friend the prophet Habakkuk: *Write the vision; and make it plain.* Even if you have to negotiate a few hurdles along the way, you will be amazed at the results.

First vicar, then rector, the Rev. Stephen Casey has served St. Edward's in Lancaster, Pennsylvania for eight years. He describes St. Edward's as a vibrant, growing parish, in a rapidly developing area of Lancaster county. This year the parish celebrates its 25th anniversary, and is actively seeking new ways to reach out to the community.

Stewardship and Fund Raising Resources

The Episcopal Church Foundation offers a full spectrum of fundraising services enabling Episcopal parishes, dioceses and other church organizations to develop resources for ministry:

- ✦ **Capital Campaigns:** A process of discernment, need identification through a feasibility study, and management of the gifting phase.
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www.tens.org

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 - Year Round Stewardship
 - Financial Commitment Programs
 - Will Our Children Be Stewards?

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by Rebecca McDonald

