

CALIFORNIA-NEVADA  
UNITED METHODIST FOUNDATION  
CAPITAL STEWARDSHIP CAMPAIGN SERVICE

LOCAL CHURCH

## A CONSULTANT LED CAMPAIGN

The Foundation's consultant will be working with you and your church in this major stewardship emphasis. It is important that you understand his/her role in this endeavor.

The consultant is a professional at assisting churches in stewardship programs. His/Her expertise has been developed through training and experience.

The Consultant sincerely wants to assist you in leading your church in a successful faith-based campaign. S/he will advise, suggest, confer, and train to that end. But, s/he *cannot* do your work for you. S/he can only consult and has no power to demand. Ultimately the final result will be determined by how you and the Consultant work together to lead the people of your church.

The Consultant will share with you the counsel of his/her expertise. S/he stands ready to answer your questions and assist you. Knowing that committee Chairs are one part of a much larger team working together, s/he will be checking constantly on the Chairs' work. Work done properly and on time is essential in the success that you both desire.

The Consultant is completely dependent upon your cooperative leadership. Training sessions that will be held during his/her trips to your church will require your comprehensive preparation. The time and place of the meeting should be set and announced in advance; the materials should be prepared and available; and the people should be enlisted and present.

Training sessions are planned at very precise times in relationship to the total program. Therefore, it is extremely important to properly prepare in advance and to have people present for the scheduled training sessions.

The Consultant is part of your Capital Campaign team. You can be assured that s/he wants to work with you to lead people individually and collectively to an encounter with the will of God for their lives. As together the people seek God's will relative to their stewardship, the ultimate reward will not only be financial but spiritual as well.

## YOUR CAMPAIGN

As you begin this capital stewardship campaign, it is important for you to understand the purpose, goals, philosophy and nature of the campaign.

I. The Foundation insures that your campaign has a **SPIRITUAL PURPOSE**. The purpose of your campaign is to lead each family and individual in your church to discover and act upon God's will for their lives in relationship to the future of your church.

Every commitment made in this campaign should be a spiritual response to the leadership of the Spirit. Our objective is not to raise a certain amount of dollars. It is to do everything within our power to help people be informed and to encourage them to be willing to prayerfully open their lives to God. When we can do that, the dollars committed will be exciting.

II. We will encourage your campaign to have a **THEME**, which is in harmony with Scripture. Your leadership team in consultation with your Consultant develops the theme.

*The campaign does not call for the same amount to be given by any two people. It does encourage everyone to make the same "quality" of commitment. No one can define for another person what significant sacrifice or generous giving out of God's abundance is in his or her life. However, we do know that it calls for more than token giving. A generous, life-fulfilling gift, a sacrificial gift, will have real meaning and value to the giver. It will involve worship, love, gratitude and faith in God who makes all gifts possible.*

III. This campaign is **DESIGNED TO INVOLVE PEOPLE** in the work of the church. Using a plan to involve people does not rule out the work of the Holy Spirit in the campaign. It simply provides a vehicle to encourage the participation of people in what the church is doing.

Normally very few people are involved in the working activities of any church. This program calls for the active participation of from one-third to one-half of your households.

As people become involved, a sense of responsibility develops. From a sense of responsibility, commitment evolves. With commitment there will come a sense of joy and an inner feeling of really belonging to the church family.

New leadership for the church will normally be discovered through this involvement process.

IV. This campaign will encourage **SPIRITUAL GROWTH**. The financial goals of this campaign may be the most challenging in the history of the church.

Many churches have learned that great goals can be reached. They have been reached through prayer, dedication and a determination to follow the plan outlined in this program.

V. This campaign will provide the opportunity to educate people in the **principles of giving and approaches stewardship from a theological perspective**. Giving is the key to joy and fulfillment in the Christian life. Jesus had much to say about this in His own teachings.

As you teach the principles of giving, many will take new steps of faith in Christian stewardship. Our observation has been that after a capital stewardship program, giving to the operating budget and missions will increase.

The ultimate objective of this campaign is not money. It is not the building of buildings. The ultimate objective of this campaign is to provide the means to encourage more discipleship in the life of the congregation and to be able to better minister to those who join this congregation.

### **CAMPAIGN LEADERSHIP**

It is important that those who accept a position of leadership in your campaign understand that how one leads will have much to do with the final result. There have been campaigns where one or two people on the Leadership Team have made the difference between average and extraordinary success.

Involvement in a campaign becomes a thrilling adventure when all of the leadership team dedicates themselves to follow proven principles of leadership.

### **EACH LEADER'S COMMITMENT**

The most important decision a leader in the campaign will make during this program will be the decision about their individual commitment. This campaign will encourage a focus on Generous Giving for Abundant Living, or Not Equal Gifts But Equal Sacrifice. This focus recognizes that God has not given everyone the ability to give the same amount in dollars and cents. However, God does call us to make the same *quality* of commitment.

In many ways, the success of the program will depend upon the degree to which the Leadership Team takes seriously the concepts of prayer, equal sacrifice, and generous giving for abundant living. What these words mean to one person may be entirely different from what it means to another. However, they all mean that any gift must have real meaning and value to the giver.

It is important that leaders' commitment set the standard of generous or sacrificial giving for the rest of the congregation. The congregation will be no more sacrificial than the

Leadership Team. Therefore, leaders are urged to seek God's will as to their commitment. When you make it a matter of prayer, your decision will become an act of worship.

A leader's decision will be most helpful to your Consultant in establishing the financial goals for your campaign. The Consultant knows that the rest of the congregation will follow the pattern established by the Leadership Team. Therefore, leaders will be asked to share their tentative commitment early in the program.

### **Capital Campaign Stewardship Program**

**There are six phases to this program:**

1. **Preparation – Objective:** To lay the foundation for the campaign
  - Feasibility Study – Interview Process
  - Congregational Approval to conduct campaign
  - Calendarizing the campaign
  - Leader/Minister orientation
  - Identifying and Enlisting Leadership Team
    - Campaign Chair
    - Prayer Director
    - Communication Director
    - Potluck Director
    - Materials Delivery Director
    - Hospitality Director
    - Celebration Event Director
    - Advance Commitment Director
    - Follow Up Director
2. **Launch – Objective:** To place the program into the hands of the leadership of the church
  - Leadership Team Training
  - Specific Committees begin enlistment
3. **Leadership commitment – Objective:** To ensure that Campaign goals are attainable
  - Advanced Commitment Dinner(s)
  - Personal Commitment Meetings with Pastor
4. **Public – Objective:** (A) To help the congregation understand the difference their gifts can make to God's ministry through their church and (B) To let them know how they can grow in discipleship through giving
  - Potluck gatherings

- Newsletters and Promotional mailings
- Banners and Posters
- Testimonials at Worship

**5. *Commitment – Objective:*** Receive commitments

- Commitment Service and Celebration Event

**6. *Follow-up – Objectives:*** Three years (with regular follow-up with the Foundation’s Consultant

- Keep the Campaign before the congregation
- Provide new members opportunity to be involved
- Tracking gifts and reporting back to donors
- Offering the opportunity for new members to make a pledge

**Unique Capital Campaign Program Features**

- Built on the foundation of prayer (not pressure)
- Designed to help people experience giving as a way to grow in their discipleship
- Includes a planned giving component to encourage enduring gifts

**Program Objectives**

- Involvement – 40-50% of the people of the church represented in the actual program
- Information – to insure every household in the church is aware of the program and the need
- Raise funds and more importantly raise-up stewards
- To ensure that the church has a positive experience through this faith journey

Members of the Campaign Leadership Team receive a campaign manual which outlines their responsibilities for the campaign.

## Preparation Steps in the Capital Campaign Program

The most successful capital campaigns are so because they have prepared properly and have used experienced campaign strategies. These preparations pave the way for achieving 50 to 80 percent of their entire goal **before** the campaign is **presented** to the congregation. The following four steps are necessary to achieve your goal: Feasibility Study Preparation, Securing Approval, and Set the Goal.

In preliminary discussions, make sure the following are involved:

- **The pastor.** If the campaign isn't a very high priority for the pastor, it won't make it.
- **Church leaders.** The administrative board and committee chairpersons may not only have a part in the planning, but also many will become volunteer leaders in the campaign.
- **Key donors.** Some, but not all, will be found among the church leaders. If you can identify some potential major donors, discuss initial ideas and plans with them.

**Tip:** *Label all your campaign planning documents **DRAFT** even if they are second or third drafts. It will show that you are open to change and not inflexible. It is also easier to remember if you are looking at the **First Draft** or the **Third Draft**. When others review the document seeing **DRAFT** on the first page suggests to volunteers or potential donors that their comments will not be in vain. Because you want many people to have input and feel ownership in a campaign, this is a valuable strategy for review meetings to look over a revised draft and gain further comment (and ownership).*

### Feasibility Study

The Feasibility Study has two phases: **preparation** for acquiring the information and actually gathering the information through an **interview process**. Preparation for the study involves determining a purpose, developing a case statement and developing a list of interviewees. Let's examine each step in the preparation for the study and then examine the interview process.

#### *Preparation for Feasibility Study*

##### Purpose

The Purpose of a feasibility study is to determine whether First UMC has the specific potential and leadership to raise specified levels of support over an identified time frame. It is important that the representatives of the church's constituency selected to participate in this study are especially relevant to both the organization and the project/program under consideration.

## **Case Statement**

For purposes of the study, a two-page statement written to acquaint the interviewee with background on the organization, its future directions, and its aspirations for private support. It will be sent to those who have agreed to participate in the study and will be used by the interviewer in the individual meetings. Therefore, it must be concise, well thought out, and admittedly, a summary of the major issues facing the church in both program and finances.

An outline of points to be addressed in the statement should include:

### Background of ***(name of church)***

Date of founding

Mission

Significant accomplishments

Key leadership (present and past) associated with the church and its mission

### Future

Directions or plans

Process to determine these goals

### Funding

What is the current level of support, including endowment (total principal and annual income)? What are the estimates or goals for increased support to realize the goals described above? From what sources might these gifts come? In what amounts? Toward what ends? Over what period of time? Are special programs envisioned to raise these funds (campaign, leadership event, other fund raising events, etc.)

### Summary

The case statement should answer the following three questions:

1. Why is ***(name of church)*** important?
2. How does it serve and whom does it serve?
3. Why does it deserve support?

The final case statement should be no more than two typewritten pages. One who can best articulate the need in a simple and concise manner should draft it. The consultant hired to conduct the study should have final approval of the statement.

## **List of Prospective interviewees**

The consultant hired to conduct the study must meet with a good cross section of those whose leadership and support would be considered critical to the success of the Capital Campaign. Names can be gathered from:

- Membership Lists
- Financial Records

- Others whose activities or interests complement the church.

### **Selection Process**

Once all names have been gathered, they should be ranked as follows:

1. ***Must*** be interviewed
2. ***Should*** be interviewed
3. ***Could*** be interviewed

The list should be larger than the proposed scope of the study in order to allow for those individuals who will decline to participate. The majority of the names should be in the ***Must*** and ***Should*** category.

### ***Process for determining Feasibility***

#### **Interviews**

To make an educated guess about what the goal should be, information is needed. You must know whether members will be interested in the needs. Will members support a campaign at levels of three to ten times (or more) their regular giving?

The best way to get this information is to **ASK**. The Foundation's Consultant works with your leadership to select an optimum of 15% of your membership, among them major donors, church leaders, and staff. We need to include those whom you guess might be the campaign's top ten donors. We follow these guidelines:

- ❖ **All responses are confidential.**
- ❖ **See people individually.** We resist temptation to call a group together. That doesn't work. People are reluctant to speak their minds in a group.
- ❖ **A Team from your congregation calls in advance to arrange the visit.** Explain that the church is considering a capital campaign and that a consultant would like to discuss some of the needs and plans. People enjoy being consulted. When the campaign begins, they will not feel left out.
- ❖ **Give them a copy of the Case Statement with information about their scheduled appointment.**
- ❖ **It is important to remember that** you consultant is not selling anything or asking for money. At this point, what we gather is information and advice.

*Some questions we ask are:*

- ✓ *Do you think these are appropriate needs for our church campaign?*  
(We want to ascertain what their reaction is to the needs. Enthusiastic, apathetic, not interested?)
- ✓ *Which needs on the list do you think are most worthy of support? Are there any you feel the members will not be interested in?*
- ✓ *Which of the needs do you personally feel are most important?*
- ✓ *Do you think that the suggested goal is achievable?* Is it too low, too high and just right? What do you think would have to happen for the church to achieve such a goal? What would you recommend as a goal?
- ✓ *Do you feel there would be sufficient leadership gifts from among our membership to reach this goal?* In most campaigns, the top donor gives between 10 and 25% of the goal. Do you think such a person exists among our membership?
- ✓ *If you were asked to consider a gift today what range of gift would you consider?*
  
- ✓ *Who are some members that you think would be potential volunteer leaders for the campaign?*

*Remember the purposes of the interviews:*

- To gain information about the feasibility of a campaign. Is there sufficient interest?
- To gauge reactions to a suggested goal.
- To learn about the interviewed member's personal interest. Which parts of the campaign might they support? What is the level of the enthusiasm? This information may be useful later during the evaluation of potential donors.
- To discover whether the interviewed member might become a potential leader in the campaign.
- To raise awareness about the coming campaign.
- To help significant members feel that they have a part in this major decision in the church's life.
- To help the congregation determine a reasonable and achievable goal for the campaign.

Immediately after the interview, your consultants make notes in order to uncover a wealth of facts and feelings that can be easily forgotten or confused. Later, when the interviews are complete, your consultant will develop a summary of his/her findings to be used in determining the actual campaign goal and to uncover any potential problems that could affect the outcome of the campaign significantly.

**When the Feasibility Study is complete you are ready to secure approval.**

### **Securing Approval**

**There is value in calling a special all-church Charge Conference and vote to do a campaign. A special meeting provides an opportunity for all to speak their mind and increase the involvement of many people**

### **Set the Goal**

Once you have identified the church's needs, discussed the campaign with the key people, estimated what amount is feasible to raise, and voted to conduct the campaign, you are ready to set the goal. Some goals are established at the time of the church vote. Other goals are delayed until some initial leadership gifts are pledged.

Establish a goal based on a balance of the needs and the feasibility. If the goal is too high, the possibility for failure and discouragement is great. If it is too low, you will have lost an opportunity. The goal should be achievable, but represent a challenge.

**California- Nevada United Methodist Foundation**

**TELEPHONE NUMBER**

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