

Summary of the Episcopal Church Foundation Capital Campaign Feasibility Study Report

(This summary is taken from the ECF report without editorial comment.)

As part of Vision 15, the establishment and implementation of a new Vision and Mission for St. Paul’s Episcopal Church, the lay and clergy leadership has been evaluating the parish’s programs, facilities, and resources, and assessing the capital needs of the church. After much study and the involvement of many people, the Vestry authorized the Episcopal Church Foundation to conduct a feasibility study to explore the willingness of the congregation to support financially these identified needs. The facts, findings, and recommendations of the resulting survey, now completed, provide a sound basis for leadership decisions with regard to the future of a fund drive.

The feasibility study consisted of individual interviews (35), three focus groups, and questionnaires. Virtually all parishioners, 412 households, were given the opportunity to participate. A total of 33% of all parish households participated, which is considered an excellent response rate for a large parish. Of those who participated, 53% attend worship services one or more times per week and 89% are regular contributors through an annual pledge.

Findings Concerning Proposed Components of a Capital Campaign

Each of the components listed in the Tentative Case Statement was ranked by respondents as high priority, medium priority, low priority, opposed, or lack information. The results are shown in the following table:

	PRIORITY				
	High	Medium	Low	Opposed	Lack Information
a. Retire Current Debt	<u>97</u>	<u>31</u>	<u>9</u>	<u>5</u>	<u>5</u>
b. Brick and Mortar Projects	<u>96</u>	<u>29</u>	<u>12</u>	<u>5</u>	<u>3</u>
c. Initiate a Facilities Maintenance Fund	<u>58</u>	<u>51</u>	<u>17</u>	<u>11</u>	<u>6</u>
d. “Jump Start” the Endowment	<u>16</u>	<u>35</u>	<u>58</u>	<u>25</u>	<u>8</u>
<i>Vision 15 Ministry Enhancements:</i>					
e. In reach/Pastoral Care for the congregation	<u>41</u>	<u>47</u>	<u>19</u>	<u>34</u>	<u>6</u>
f. Ministry to children, youth, young adults and families	<u>49</u>	<u>39</u>	<u>17</u>	<u>33</u>	<u>7</u>
g. Music Ministry	<u>26</u>	<u>34</u>	<u>36</u>	<u>46</u>	<u>3</u>
h. Outreach	<u>44</u>	<u>55</u>	<u>16</u>	<u>21</u>	<u>4</u>

Based on these results, the Episcopal Church Foundation ranked the components from most popular to least popular, as follows:

RANKING BY POINTS:

Retire Current Debt	357
Bricks and Mortar Projects	353
Initiate a Facilities Maintenance Fund	282
Vision 15 – Outreach	237
Vision 15 – Ministry to children, youth, young adults and families	209
Vision 15 – In reach/Pastoral Care for the congregation	202
Jump Start the Endowment	151
Vision 15 – Music Ministry	136

Synopsis of Study Conclusions of the Episcopal Church Foundation

• **Interest in and Support for a Drive**

There is indication of support for a modest campaign, but also signs that suggest caution. Positive signs from respondents include:

1. Eighty-two percent are in favor of the campaign, although many with reservations on a number of proposed projects, especially the programming proposals.
2. Sixty-two percent of respondents would give to the campaign.
3. Comments indicate maintenance issues of the parish are the highest priority.

• **Concerns**

1. Approximately 8% of respondents feel the goal is reachable. Forty-eight percent feel it is too high. The remaining 44% had no opinion on whether this goal can be achieved. This is an indication that the proposed goal is too high.
2. No major gifts were identified at this early date to allow a goal of \$1,826,000 to be considered.
3. The congregation does not endorse all the proposed programs.
4. St. Paul's has and is dealing with some major issues that would ordinarily be enough to postpone any vision process leading to a capital campaign. For this the clergy and lay leadership are to be commended for their energy and forward-looking planning. These challenging issues are:
 - The Diocese of Pittsburgh has suffered a theological schism that absorbed energies and took senior leaders away from parish investments in mission and ministry.
 - This schism rippled through St. Paul's and numerous long-term members left, again depleting energies and good will. Church membership and stewardship have suffered as a result.

- Previous rectors, interim and full term, have had significant pastoral-care talents, but did not invest as much energy in administrative tasks or management issues.
- A new rector was called into a difficult atmosphere of schism and some anger due to the rupture in the diocese, which overflowed to a degree into the parish. Not every priest would have had the courage or energy to accept such a call.
- The new rector was given a charge to enhance administrative systems and to grow the church. Some parishioners have been challenged with this change in focus and a differing leadership style.
- With all these adjustments and bubbling issues, the U.S. economy dived into a deep recession from which the church community still suffers.
- In spite of the above challenges that would have slowed the faint of heart, the rector and lay leadership have boldly called the parish into visioning, seeking to renew the fabric of an aging structure and to offer programming and ministries that will attract new members and better serve the community.

Gift Potential

Experience tells us we can take the average between the low estimate (\$259,500) and the high estimate (\$468,500) of the pre-campaign projections revealed in the Study and multiply by a factor of 1.5 when certain percentages and comments (such as revealed in this study) are attained. Thus the average, \$364,000, when multiplied by this factor (1.5) reveals a suggested goal of \$546,000. This recommendation is made factoring in the reality that additional gifts, not yet identified, will be forthcoming; hence the multiple of 1.5.

Planned Giving

A number of people requested planned giving information, and seven indicated the church was already in their estate plans. This is encouraging and suggests that such future gifts could be used to help build endowment or retire indebtedness.

Key Recommendations of the Episcopal Church Foundation

Recommendation #1

This Study reveals that a campaign launched this fall could raise an amount considerably less than desired.

Therefore, several options are to be considered:

- A. Cancel the campaign as the energy to raise \$500,000 does not justify the effort.
- B. Or postpone the campaign for three to twelve months until greater consensus can be attained and hopefully, the economy improves. With clarification of the proposed programs, i.e. articulating further air conditioning and space renewal items, and with more time to nurture potential gifts, a larger, challenge goal might be possible.

- C. If the campaign is postponed to allow greater discernment, listening efforts and repositioning of the vision statement, leadership could offer an enhanced vision for annual stewardship this fall. Such a mission-challenged budget could include the programming items offered in the tentative case statement. Comments suggest parishioners see programming as a budget, not a capital campaign, item.

Recommendation #2

Planned giving activities should be pursued during the campaign in an effort to encourage major gifts to underwrite the future of the church. Such gifts, often deferred and received in future years, are helpful in reducing mortgages or indebtedness. The Episcopal Church Foundation is responding to individual requests for information on planned giving.

Recommendation #3

Consider also the prioritization suggested by respondents. If a campaign is to be immediately pursued, it is still necessary to review the Tentative Case Statement and make final decisions based on the financial feasibility revealed in the Study. Respond in public to their concerns and recommendations. Invite again their participation. Demonstrate that leadership is listening.

Recommendation #4

Whatever decisions are made, share as soon as possible plans and a calendar with the congregation. Increase significantly all publicity concerning this project.