

# “Creating a Foundation for Success”

## Parish Capital Campaigns

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**GUIDANCE IN GIVING, INC.**

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# **IS YOUR PARISH READY FOR A CAMPAIGN?**

- ◆ **I. Case Statement of Needs**
- ◆ **II. Arch/Diocesan Policies**
- ◆ **III. Determining Financial Potential**
- ◆ **IV. Parish & Campaign Leadership**
- ◆ **V. Campaign Strategy**

# I. Case Statement of Needs

- ◆ How has the parish arrived to this point of considering a campaign and why is the parish looking to raise funds?
- ◆ History & justification of the proposed project
- ◆ Has the parish identified additional short term and long term needs of the community? (*Master Planning*)
- ◆ Urgency of implementing the project

## II. Arch/Diocesan Policies

- ♦ What is the the approval process for permission to conduct a capital campaign?
- ♦ Once the parish has received permission to move forward...
- ♦ Diocesan Finance Office:
  - Building Fund Tax
  - Cash in hand requirements
  - Bridge financing availability and terms
  - Mortgage (*how much can we afford? Multiple campaign strategy & offertory income models*)
  - Defined level of involvement

- ◆ Diocesan Development Office:
  - Annual Appeal
  - Stock & IRA Gifts
  - Planned Giving
  - Approved lists of fundraising firms
  - Defined level of involvement
  
- ◆ Diocesan Construction/Building Department:
  - Planning process
  - Local municipalities
  - Approved list of architects & contractors
  - Defined level of involvement
  
- ◆ Lines of Communication with all departments  
(*expectations and frequency*)

### III. Determining Financial Potential

- ◆ Case
- ◆ Current census, updated parish roster  
(*names, address, phone, email, ministry involvement, etc.*)
- ◆ Income:
  - Annual offertory income
  - How many families receive envelopes? Use envelopes?
  - Weekly cash received
  - Parish Savings/Building Fund
  - Annual appeals (diocesan and parish), Sacrificial Giving, Stewardship, other development efforts...

- ◆ Demographics:
  - Is the parish increasing/decreasing/stable in size?
  - Demographic shifts?
  
- ◆ Past Campaign History:
  - Has the parish conducted a campaign in the past?
  - If so, when was the campaign conducted?
  - What was the case?
  - Amount Raised, No. of gifts received (*ratio to offertory*)
  - Strategy implemented

♦ Additional thoughts:

- Major gift potential
- 1/3 rule of being Catholic
- Does the parish have the ability to service a loan?  
If so, for how much?
- Can the financial challenges ahead be addressed through regular stewardship of treasure?
- Have parishioners been involved and/or communicated with about the proposed campaign?



## IV. Parish & Campaign Leadership

### ♦ Pastor

- How long has the pastor been at the parish?
- Is the pastor a strong leader? Pastorally?  
Financially? Can he motivate people to participate?
- Passion & sincerity for the project
- Is the pastor aware of the diocesan policies and requirements?
- Does the pastor have experience with construction projects?
- Does the pastor have experience in conducting successful capital campaigns?
- Can the pastor “ask for the gift”?

◆ Laity

- Does the parish have the lay leadership necessary to implement a successful campaign?
- Cross-section of parish life (*ministry, programs, culture years as a parishioner, etc.*)
- Can leaders motivate other to participate
- Passion & sincerity for the project

## V. Campaign Strategy

- ◆ Feasibility Study
  - Does the diocese require the parish to conduct a feasibility study?
  - Is there “controversy” in the case?
  - Does parish leadership need guidance from the parish family on the project?
  - Creating a sense of ownership
  - Financial goal of a campaign
  
- ◆ Timing
  - Begin when you are in the best position to succeed
  - Is there a good vs. bad time to conduct a campaign locally?

◆ Competition

- Are any other local parishes conducting or considering a campaign?
- Are there any other campaigns ongoing in the community?

◆ Goal

- Amount needed vs. amount that can be raised
- Psychology of fundraising
- Having reasonable expectations of parishioners

♦ Fundraising Counsel

- Approved firms in the diocese
- Full-time vs. part-time service model
- Experience
- Raising funds for Catholic organizations only  
vs. raising funds for other organizations  
*(other denominations, universities, hospitals, civic & political organizations, etc.)*
- Campaign strategy  
*(Reception Model vs. Visitation Model)*
- Redemption rate on pledges
- Level of involvement after the active campaign

# Cornerstones of a Successful Campaign

- ◆ Strong, dedicated and committed Leadership
- ◆ A compelling case statement with strong parish-wide support
- ◆ A challenging yet achievable goal
- ◆ A generous, concerted response on behalf of every family built on a spirit of enthusiasm, optimism and true Christian Stewardship

**A successful capital campaign involves understanding and respecting the mission of the Church, asking parishioners to reflect on how greatly God has blessed them, feel thankful for their blessings, and to prayerfully consider whether their giving to their parish and community mirrors the gratitude they feel.**