

CAPITAL CAMPAIGN PLANNING STUDY

EXECUTIVE SUMMARY

PREPARED FOR

ST. DEMETRIOS GREEK ORTHODOX CHURCH

By Fr. Anthony Scott of Stewardship Advocates

CAMARILLO, CALIFORNIA

MAY 2009

PLEASE NOTE: *THIS IS A SUMMARY OF THE ENTIRE STUDY CONDUCTED. THE COMPLETE REPORT CAN BE OBTAINED AT OUR WEBSITE, WWW.SAINTDEM.ORG, OR BY CONTACTING THE CHURCH OFFICE (805) 482-1273. EVERYONE IS ENTITLED TO A COPY OF THIS REPORT!*



Forty-seven (47) personal interviews and surveys were received including one “Anonymous” participant for a total of 66 people for the Capital Campaign Planning Study by the end of April 2009 by Fr. Anthony Scott of Stewardship Advocates. While on site Fr. Anthony also facilitated a focus group consisting of nine participants. This is an excellent response from the parish. Participants included a cross section of the parish: members of the Parish Council, officers, founding members of the parish, and other key parishioners whose support is considered vital to the success of this study and the successful conclusion of the campaign.

In order for a capital campaign to be successful, it must aim to raise funds for the right cause, asking the right people at the right time for the right resources. The general *climate* conducive to successful fund raising must be ascertained. For this reason, it is important that St. Demetrios take account of the state of the parish before launching a campaign. Each interviewee was asked, “Concerning the future of the parish, do you feel optimistic or concerned or both?”

Opinions generally expressed concern. From 52 respondents, 69% described themselves as either concerned or both concerned and optimistic. Another 29% felt optimistic.

When asked to list the greatest strengths of the parish, the Fr. Gary was most often cited, using descriptors such as “energetic”, “fluent in Greek”, “dedicated”, “hard-working”, “has vision”, “brought a lot of new people in”, “caring and enthusiastic” and “smart.” The next most often cited strength was the community itself. Here, descriptors included “home-like”, “many converts yet maintains ‘Greekness’”, “diverse”, “dedicated”, “many young families” and “a welcoming community.” Other cited strengths included “the festival”, “only Greek Orthodox parish in Ventura County”, “many new members”, “increased giving over the past five years”, and “a shared vision of the future.”

Having expressed love and great hope for the parish and its leadership, each interviewee was asked to note the most significant weaknesses or challenges that stand before the parish – especially in light of an ambitious fund raising campaign. The most often identified challenge is financial: “the recession”, “the poor economy”, “people losing their jobs”, “many retirees on fixed income”, and “not a wealthy community.” This cited challenge is likely the explanation for the relatively high percentage of people who expressed concern about the future of the parish and the capital campaign in particular. It may be important to remember that when this study was conducted the Dow was at 6500.

Other cited challenges are very typical of parishes – even those touted as exemplary Orthodox communities – factionalism, difficulty recruiting enough volunteers, succession planning for leadership, undeveloped outreach/evangelization program, poor giving, complacency, church politics and the need to focus more upon the youth. While not lessening the importance of continually addressing these parish “short-comings”, it is important to accept that these have occurred in every parish in every era in the history of our church. One needs only to read the Acts of the Apostles or the history of the Ecumenical Councils!

The next question asked was, “Will parishioners positively respond to the Campaign?” People were generally pessimistic about a campaign of \$2.75 million – especially in light of the present economic malaise gripping the country. A minority of respondents – 10 out of 46 or 22% responded “Yes.” The largest percentage at 41% responded “perhaps”, thereby registering uncertainty. Eight respondents or 17% said that people would not respond positively.

Interviewees and survey participants were asked, “What does your intuition tell you concerning the percentage of the parish that at least *morally* supports the building program?” The averaged response of the 42 respondents who answered this question was 64%.

The next question was more direct: “Can we raise \$2.75 million over five years?” From 51 responses, 17 or 33% said, “No.” Thirteen or 25% said, “Perhaps.” Eleven or 22% said, “Yes.” And finally, 10 or 20% said, “I don’t know.”

Along this subject line, participants were asked, “If \$2,750,000 seems like too large a goal for the community, then what do you feel would be a reasonable goal.” Nine people chose to answer this question. The averaged response was \$1,0380,000.

SPECIFIC CAMPAIGN OPPORTUNITIES



- 1) Fr. Gary Kyriacou, the presiding priest at St. Demetrios Greek Orthodox Church, receives a strong vote of confidence from his parishioners.
- 2) A new piece of property has been acquired that is generally described as centrally located and highly suitable for the construction of the new facilities.
- 3) The membership describes the parish as home-like; having many converts yet maintaining “Greekness”; diverse; dedicated; having many young families; and a welcoming community.
- 4) It was noted that stewardship giving had doubled over the past five years.
- 5) Many names were offered as prospective major donors; the names offered indicate undeveloped potential gifts.
- 6) \$395,000 to \$660,000 in prospective new gifts to the campaign was indicated by respondents in the study.
- 7) A strong majority of study participants indicated that they would make a gift to the campaign.
- 8) Many respondents felt that the parish would be open to the idea of initiating an endowment program. Eighteen indicated openness to meeting with a member of a prospective endowment committee and five indicated that the parish was already in their estate plans.

SPECIFIC CAMPAIGN CHALLENGES



- 1) Joyful *sacrificial* giving as a *meaningful* and *proportionate* return to God of all that we have received from Him is a rare practice in the parish. Stewardship giving tends to be in response to what others are doing and what is required for the operating budget of the parish. If people have not yet learned how to give *sacrificially* from their disposable income, how will they ever consider giving *sacrificially* from their appreciated assets? The general non-practice of sacrificial giving means that simultaneously with a capital campaign an educational program must be conducted on the meaning and partice of biblical stewardship. This will impede progress.
- 2) Respondents expressed deep concern regarding the state of the economy, the decline in housing values, unemployment and a precipitous drop in the stock market; many felt that this will have a strong negative impact on the campaign.
- 3) The parish has little experience receiving major gifts or soliciting major gifts. Mentoring this process guides and inspires others. The absence of mentoring indicates an impediment to progress.
- 4) Interviewees were pessimistic about the ability of the parish to successfully raise \$2.75 million in a single campaign for this project. They do believe, however, that some portion of that is attainable.
- 5) Only a modest percentage of those spoken with were confident that the \$500,000 leadership gift and the other gifts necessary at \$250,000, \$100,000 or \$50,000 would be available for a successful \$2,750,000 campaign. Skepticism and doubt are not friendly allies of a capital campaign.
- 6) A number of respondents indicated that there was no concentration of significant wealth in the present membership and that there were a high number of retirees on fixed income.

RECOMMENDATIONS



The recommendations presented here are drawn from the information received from those who participated in the Capital Campaign Planning Study conducted by Stewardship Advocates and an on-site assessment. Counsel has interpreted, analyzed, and evaluated the data on the basis of professional theories and methods

of nonprofit development combined with 22 years of full time fund raising and institutional development experience in hundreds of Orthodox settings. Counsel respectfully suggests that the recommendations should be carefully considered as the parish reflects upon a capital campaign.

- 1) **Go forward with a capital campaign. The suggested goal, based on the *empirical evidence* gathered in the interviews, would be \$1,500,000. A “stretch” goal would be \$2,000,000.** Realize that goals can always be increased should strong giving warrant a higher objective. The readiness to support the building of new facilities receives strong moral support from a majority of those interviewed. It’s important to remember that people invest in projects – both for profit and non profit – that appear to have a reasonable goal or promise a reasonable return on investment.
- 2) **Emphasize the vital importance of leadership gifts.** These and these alone create a sense of optimism, confidence, credibility, determination and resolve. Leadership gifts elegantly and pointedly dispel fear, skepticism and doubt concerning the attainability of a project. Receiving the top leadership gift in a suggested \$1,500,000 - \$2,000,000 campaign would have a transforming, catalytic and electrifying effect on the community.
- 3) **Undertake a major effort to more comprehensively identify those capable of major gifts, followed by a systematic process of cultivation to build ownership of the project within these prospects.** Because St. Demetrios has not needed to speak to people of significant means for significant gifts, little is known of their philanthropic interests, motivations and affiliations.
- 4) **Craft a strong case statement for the project.** Once the goal of the campaign is well defined, each parishioner must be given the information they need to become an advocate for the project. The case statement will need to convey the needs of the parish, the benefits to the community if the campaign is successful and also articulate a compelling vision for the future of St. Demetrios.
- 5) **Select a Greek-American co-chair to work with Bruce Wilson and other committee members very carefully. The committee may not need to be more than 8-10 people.** Remember that these people need to be the most effective leaders in the parish. Ideally, the Campaign Committee gives 40% of the campaign goal. The Campaign Chairpersons ideally should be in the leadership gift group, articulate, effective in asking for gifts and able to reach out both to those who support and to those not yet on board. High energy, the ability to communicate confidence and resolute determination will be essential to success. Allow the consultant to assist in identifying and recruiting these individuals.

- 6) **Continue to work on stewardship, continually improving annual giving by parishioners and conscientiously teaching the biblical principles of sacrificial and generous giving according to ability.** Stretch the giving perceptions and practices of the parish.
- 7) **Identify the administrative person who will provide back office support to the campaign. Allocate five hours per week for administrative support.** Recording pledges and gifts accurately and efficiently will need to be a priority for this person. Accurate quarterly statements must be consistently sent out to donors. A campaign newsletter will also need to be sent out periodically. He or she will likely need to handle questions from major donors over the telephone in a polite and professional manner. This person will need to manage the scheduling of multiple meetings with prospective donors and committees. Attending capital campaign meetings, recording the proceedings and distributing minutes will be necessary as well.
- 8) **Continue to provide highly visible financial controls and communications procedures.** These competencies build confidence and encourage investment.
- 9) **Use the services of a professional fund raising consultant to assist with implementing the recommendations above.** Professional nonprofit consultants assert proper priorities, bring proven expertise to bear, challenge present thinking, force deadlines and timetables and can change the way things have always been done. The development and advancement of nonprofit institutions (including churches) has become a science in the past 25 years. Building community consensus, professionally enhancing annual giving, initiating an endowment program and ultimately, raising major gifts in a capital campaign, are difficult, challenging and complicated endeavors. Most priests are working at maximum capacity managing the day-to-day needs of their parish, rendering service to parishioners and leading the community in worship. They do not have the time, the training or the expertise to also undertake these vital strategies for long-term parish development.
- 10) **Initiate an endowment program within the community, encouraging members to provide for the parish in their estate plans.** This is an extremely sensitive matter for most people, yet a number of respondents in the study indicated a willingness to speak with someone within the parish about this possibility. Counsel remains convinced that almost everyone can do *something* in their estate plans for the church that brought them so much joy in their life.