



November 12, 2015

We wish to extend our thanks to all for the cooperation, support and gracious hospitality extended to Leslie Pendleton throughout the feasibility study process recently completed.

A special word of thanks goes out to Carol Schwobel and Chris Parker for coordinating the personal interviews and the mailing of the questionnaires. Another word of thanks is in order for Chris and her heroic effort at updating the parish database.

During the implementation process, we found friendly, concerned, and open communication regarding the proposed campaign and project plans. A total of 97 units participated in the survey; 12 interviews were conducted, 11 responded to the mail questionnaires, and 74 responded to the online survey. This represents a total response rate of 47% among the members of the church community that were contacted.

This study is our distillation of the information, opinions, and ideas gathered through the survey. It represents our combined evaluation and appraisal of major factors related to the proposed campaign.

Now important decisions must be made to continue the momentum essential to the success of a campaign. The Episcopal Church Foundation welcomes the opportunity to provide further assistance.

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I. Tentative Case Statement	

## **Executive Summary**

After a period of discernment, and careful evaluation of needs, parishioners of Church of the Ascension, Silver Spring, MD were surveyed through a Feasibility Study conducted by the Episcopal Church Foundation (ECF) in October 2015. The purpose of the study was to determine the willingness of the parish to support a proposed capital campaign to raise up to \$900,000 from members of the congregation for building renovations and improvements.

All members of the parish were invited to participate in the feasibility study and 47% responded to the survey via personal interviews, led by the ECF consultant, direct mail, and electronic emailed survey.

Responses indicate 98% support among the respondents for conducting a capital campaign, although some have reservations. ECF recommends that Ascension move forward with a capital campaign with an adjusted goal.

Study results indicated that 87% of respondents would contribute to a campaign at this time. By using the ranges of estimated gifts they indicated, and applying a formula which takes into account as yet unidentified gifts, as well as other relevant factors noted in the responses, ECF recommends that Ascension conduct a capital campaign to raise a primary goal of \$600,000.

All of the comments provided by respondents are included in the following report. The unattributed comments should be read thoroughly in order to obtain a complete understanding of all views expressed in the Study. This will prove very helpful to the leadership and members of the congregation as decisions are made about final project plans and moving forward with a campaign.

Section One of this Report provides background on ECF's Feasibility Study methodology and offers more detailed conclusions and recommendations flowing from the results of the Study.

*Section One:*

**Conclusions, Recommendations and Methodology**

## I. Introduction

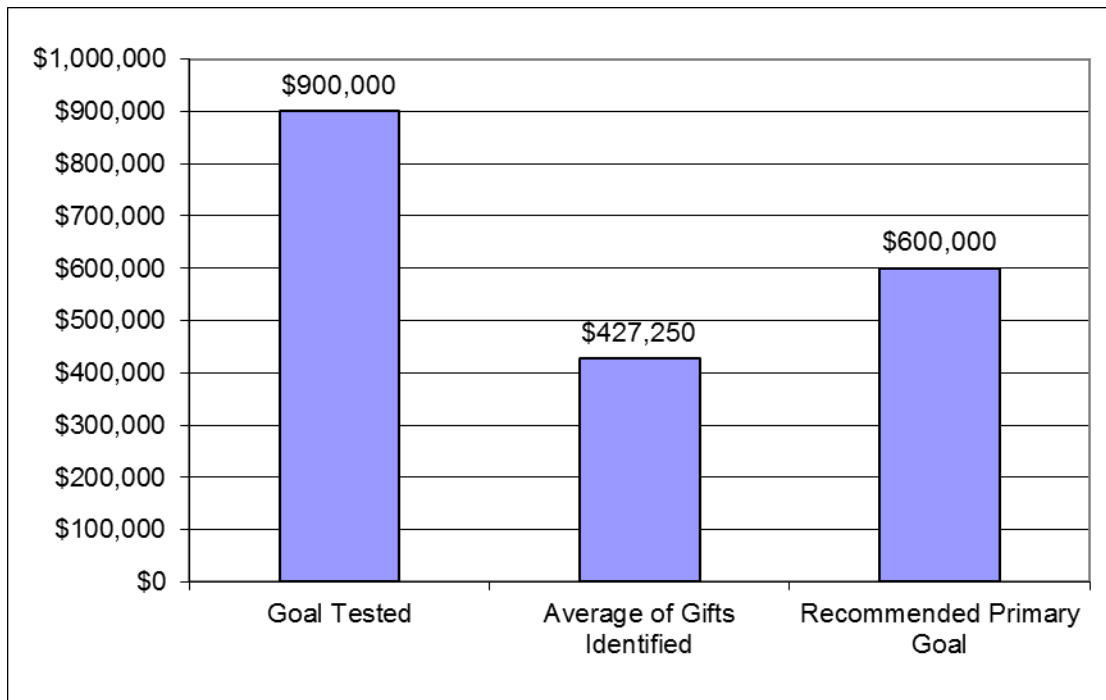
For some time the leadership of Episcopal Church of the Ascension, Silver Spring, Maryland has been evaluating the parish's programs, facilities, and resources, and assessing the capital needs of the church. After much study and the involvement of many people, the Vestry authorized the Episcopal Church 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. A complete description of the goals of the proposed plans may be found in the tentative case statement in the Appendix.

## II. Conclusions

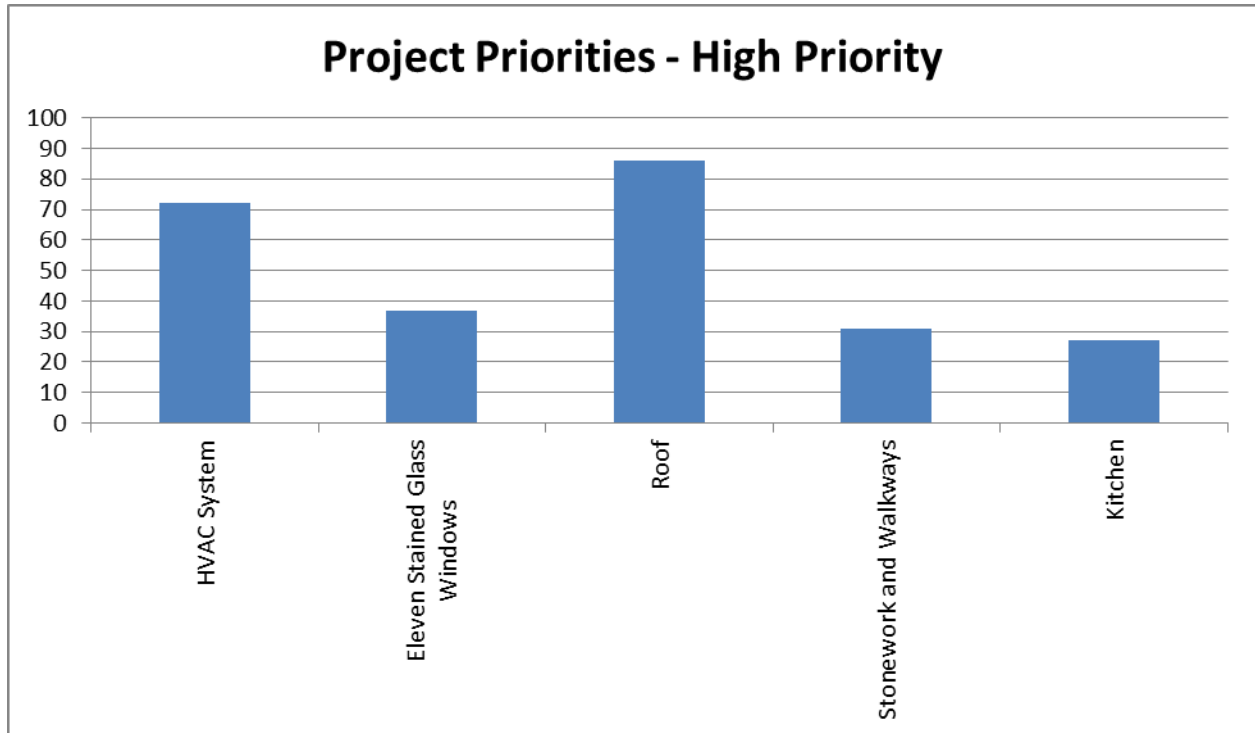
### Gift Potential

Experience tells us we can take the average between the low estimate (\$320,500) and the high estimate (\$534,000) of the pre-campaign projections revealed in the Study and multiply by a factor of 1.4 when certain percentages and comments (such as revealed in this study) are attained. Thus the average, \$427,250, when multiplied by this factor (1.4) reveals a suggested goal of \$600,000. This recommendation is made factoring in the reality that additional gifts, not yet identified, will be forthcoming; hence the multiple of 1.4.



## Awareness of Need

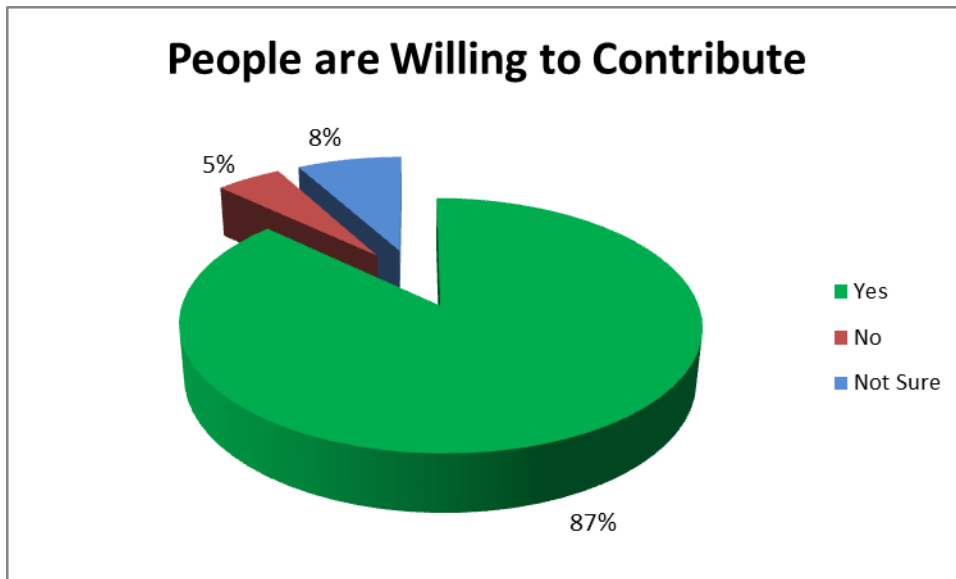
A majority of respondents (90%) were aware that Episcopal Church of the Ascension is considering a possible campaign, and 92% were also aware of some or all of the proposed plans. Of course, not all the items received the same degree of support. Present awareness of need is a positive; however, each project should be studied and prioritized with consideration given to the degree of support and the resources available.



## Interest in and Support for a Capital Drive

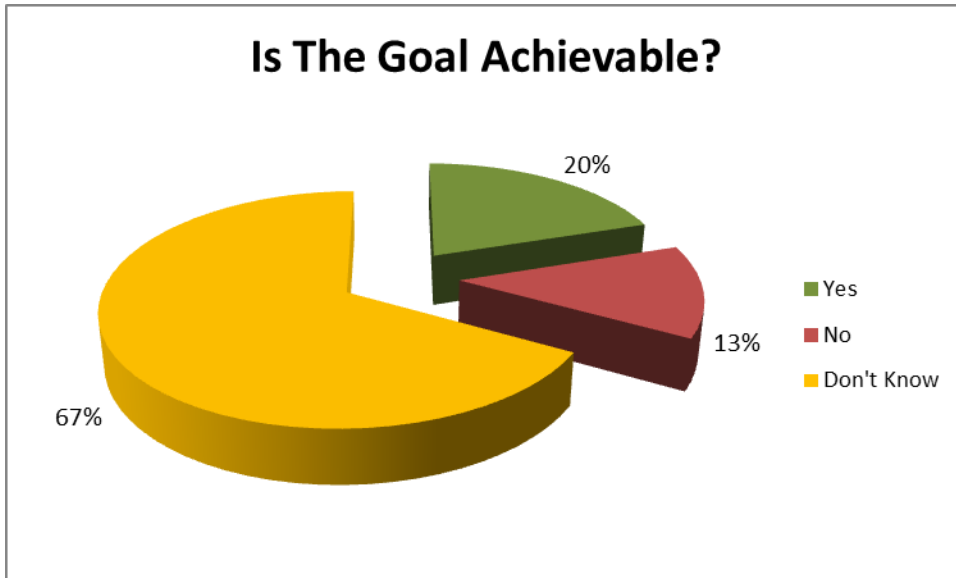
There is significant indication of support for the proposed campaign, but also signs that suggest caution. Positive signs from respondents include:

1. Ninety-eight percent are in favor of the campaign, although some with reservations.
2. Only 10% are opposed to the proposed campaign timing.
3. Eighty-seven percent of respondents would give to the campaign.
4. Twenty-three percent are willing at this early stage to consider a volunteer position.

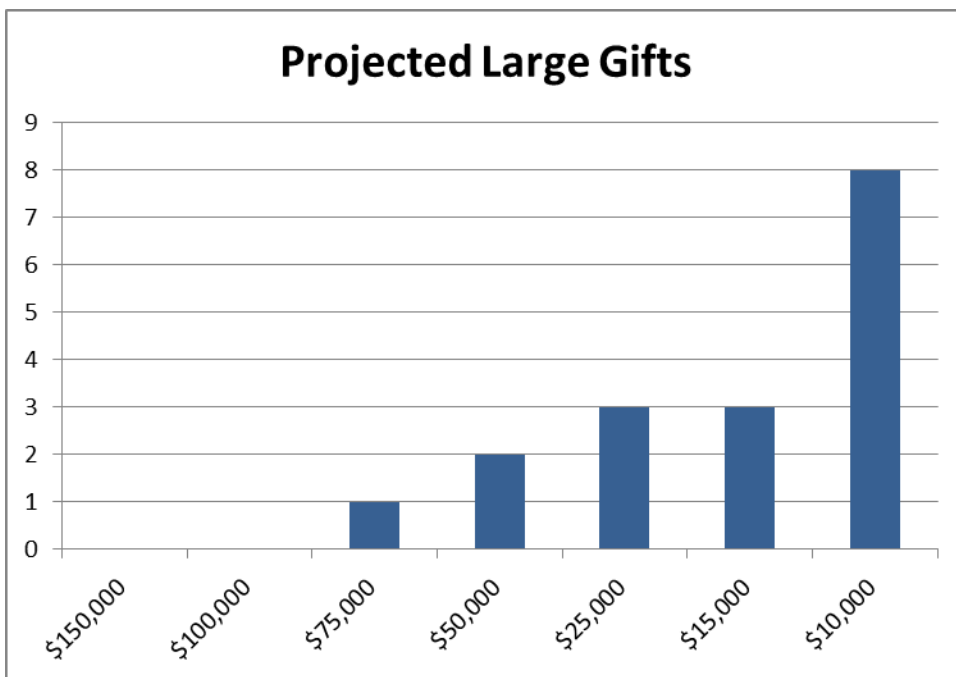


## Concerns

1. Approximately 20% of respondents feel the goal is reachable. Thirteen percent feel it is too high. The remaining 67% had no opinion on whether this goal can be achieved. This is an indication that the proposed goal may be too high.



2. No major gifts were identified, and too few larger gifts were reported at this early date to allow a goal of \$900,000 to be fully embraced.





## Influential Leadership

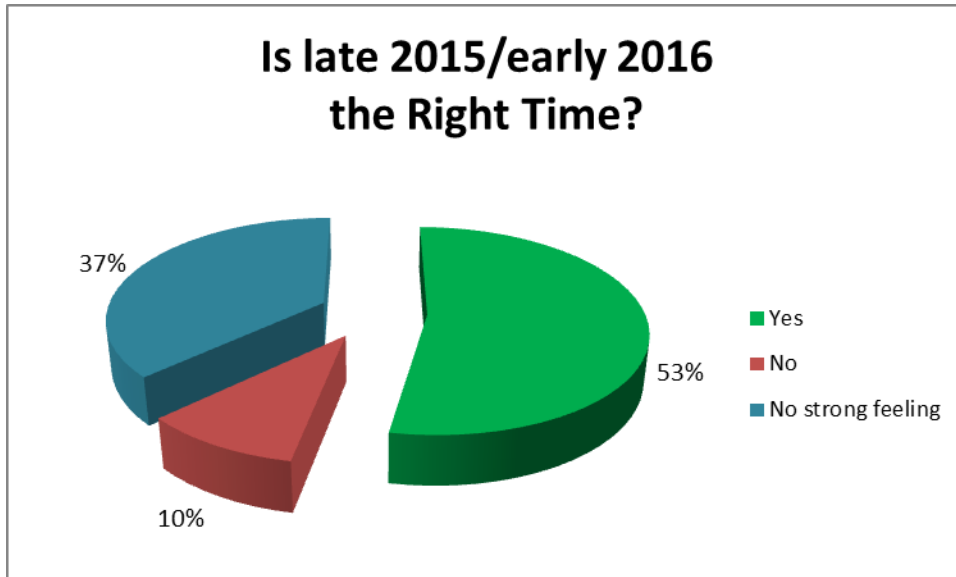
Strong leadership—both financial and volunteer—is absolutely essential for the success of any campaign. A leadership core is presently in place. It is the challenge of this leadership group to expand involvement within the parish, including other individuals who may have significant giving potential. With involvement comes commitment.

## Planned Giving

A number of people requested planned giving information, and six 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.

## Campaign Timing

The respondents endorsed the proposed campaign timing. Of course, decisions on the priorities of projects must be made. It is imperative to revisit the proposed plans and make appropriate changes in the size of the effort, the proposed goal, and other sources of funding.



### **III. Recommendations**

#### **Recommendation #1**

The information revealed in this Study suggests that a capital campaign for a Primary Goal of \$600,000 is realistic and appropriate. This presupposes that an assertive campaign involving the entire constituency would be launched, and that the type of methodology used by the Episcopal Church Foundation would be followed.

Recognizing that immediate needs are greater than what is revealed in the Study, leadership may wish to consider \$600,000 as the “primary” goal and establish a larger “challenge” goal, which would encourage the congregation to stretch to longer pledges—five years rather than three years, for example.

If the “challenge” was not reached, the congregation would still experience success by achieving the “primary” objective, but hopes would be high that the challenge, at least in part, could be accomplished.

#### **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**

Review the Tentative Case Statement and make final decisions based on the financial feasibility revealed in the Study. Consider also the prioritization suggested by respondents.

#### **Recommendation #4**

Share as soon as possible the revised plans with the congregation and seek increased consensus. Increase significantly all publicity concerning this project.

#### **Recommendation #5**

Once the leadership has had an opportunity to review the Study recommendations and revise the proposed plan, a timetable such as the following should be considered to maximize success:

Months 1-2	Determine campaign calendar and budget. Announce goal. Begin materials development (pledge cards, brochures, letterhead, etc.). Recruit and train campaign leadership and support committee chairs. Evaluate Advance Gift prospects.
Months 2-3	Continue to train leadership. Complete materials development. Begin Advance Gift solicitation. Contact planned giving prospects, if appropriate.

Months 3-4

Prepare for and launch the Congregational Gift division. Hold kick-off event. Begin personal solicitations and monitor solicitation efforts.

Months 4-5

Finalize all calls. Set up pledge collection and acknowledgment systems. Hold Celebration Event to acknowledge conclusion of the campaign and recognize the leadership and volunteers.

### **Recommendation #6**

Select professional management to guide and direct the campaign to insure efficiency and the implementation of a proven, successful fundraising methodology.

## **IV. Methodology**

### **A. The Feasibility Study**

As the parish considers a capital campaign, it should reflect on several important questions:

- ◆ What conditions are essential to a successful campaign in the church community?
- ◆ How much money realistically can be raised?
- ◆ Will the church community support a drive that fulfills the goals of the proposed plans?
- ◆ When should the campaign begin, and how long should it last?
- ◆ What volunteer leadership is available to head the campaign?

Determining the answers to these and other questions was the major purpose of the Feasibility Study. Through the Study we have researched, analyzed, and evaluated fundamental factors present, or capable of development, which might influence a capital campaign.

The study was conducted in three phases: research, personal interviews, and direct mail.

#### **Phase I**

An examination of the proposed needs, development of a “Tentative Case Statement,” determination of optimum campaign goals and timing, and review/selection of personal interview prospects were completed during sessions with the parish leadership.

#### **Phase II**

A sampling of parish members was selected for personal interviews. A total of 12 interviews were ultimately conducted by Leslie Pendleton of the Episcopal Church Foundation.

#### **Phase III**

A mail survey was sent to 41 households. Included in the mailing was a letter requesting participation in the survey, the questionnaire, the tentative case statement and a self-addressed return envelope.

An online survey was sent to 152 households. Included in the mailing was a letter requesting participation in the survey, the online questionnaire, and the tentative case statement.

## **STATISTICAL NOTE:**

- ◆ A total of 41 direct mail questionnaires were mailed to the parish community.
- ◆ Of those, 11 were returned: a mail response rate of 27%.
- ◆ A total of 152 online surveys were sent to the parish community.
- ◆ Of those, 74 were returned: an online response rate of 49%.
- ◆ Including the 12 who were interviewed, 205 units were exposed to the study. Of those, a total of 97 units or 47% participated.
- ◆ Based on experience, this response rate is an excellent representative involvement from the parish community, lending credibility to the study findings.
- ◆ Of the total that participated, 50%, attend worship services one or more time(s) per week. Another 30% attend two to three times per month.
- ◆ Regarding the financial-giving practices of those who responded, the majority, 73%, are regular contributors with a written annual pledge.
- ◆ In importance of charitable donations, Church of the Ascension ranks as the most important charity that respondents donate to, with 56% rating it as such. Another 34% rate it in their top five charitable donations.

## **B. Elements of a Successful Campaign**

There are certain elements which must exist in connection with every successful fundraising campaign.

1. Recognition and acceptance of the “tentative needs” as expressed.
2. The case for widespread appeal.
3. Availability of strong financial leadership.
4. The capability of existing leadership to recruit additional support.
5. Past and current support levels for other church-wide capital campaigns.
6. The congregation’s awareness of the proposed plans.
7. The economic optimism of the parish community.
8. Overall response to goal attainability.
9. Indicated interest in contributing to, and projected levels of support for the proposed campaign.
10. Projected timing of the campaign.

These elements are carefully reviewed in this report. The Conclusions and Recommendations Section of this report addresses the elements of success as we consider the readiness of Episcopal Church of the Ascension to proceed with a major capital campaign.

*NOTE: Minor editing has occurred in the comments to ensure grammatical accuracy and preserve the anonymity of the feasibility study respondents. Also, the spelling of some names could not be verified against the parish directory.*

*Section Two:*

**Composite Analysis and Summary of  
Personal and  
Direct Mail / Online Responses**

# Results from 12 Personal Interviews, 11 Direct Mail and 74 Online Responses **Total of 97 Responses**

*Note: Not all respondents answered all questions.*

## **Awareness of Need**

### **1. Prior to this survey, were you aware that the parish was considering a capital campaign?**

87 Yes      10 No

Ninety percent were aware that Episcopal Church of the Ascension is considering a capital campaign. This is a positive indication that the church leadership has prepared the ground for a major capital campaign.

### **2. Prior to this survey, were you aware of the needs as expressed in the accompanying proposed plans?**

58 Aware      8 Not Aware      31 Aware of some of the needs

Sixty percent of the respondents were aware of the capital needs of Episcopal Church of the Ascension. Another 32% were aware of some of the needs. Only 8% were not aware of the needs. This is an indication that the leadership has done a fine job of communication.

### **3. Are there additional needs that seem important to you which are not covered by the proposed plans?**

*Comments:*

When the stone work is done to the exterior of the church, can landscaping be added? The grass is a low quality and shrubs appear old and tattered. Can newer, more resilient and nicer looking greenery be added (maybe can be done as a part of the stone work)?

Creating a much needed reserve fund. (3)

Hiring an associate priest in addition to Terri. These two women are overwhelmed with the work that is expected of them.



I would like to see a concerted effort for A/C in the sanctuary.

I think we need to eliminate or at least greatly reduce our mortgage. That line item is something close to \$80,000 of our annual budget and if we could get out from under that obligation I think we could really unleash something special in the ministry of the church. (3)

This isn't spelled out in the case statement, but I would hope that the HVAC plans include advanced/enhanced options for controlling heating/cooling costs (e.g. 'smart' thermostats, remote checking and changing for climate control, etc.). I also wonder, if we go with the non-slate option for the church roof, if we might consider installing solar panels to help power the church.

Less comfortable outreach programs... more aligned with what the prophet did. Listen more carefully to less popular suggestions. These are not expensive proposals but are part of the church's religious capital... not all capital is about money.

Making sanctuary more accessible to those who need assistance with mobility.

Update Ascension House kitchen.

Sustainability: how would the proposed modifications help create a church that better lives out the injunction to be good stewards of the Earth?

Get rid of junk in the old Guild Room that is visible from the rear walkway behind the church by Ascension House.

I am just wondering if, with all the renovations, solar power might be considered as a source of energy for the church.

I do not drive but it seems to me that it should be noted on the website that there is a place to park for those who need it in the school parking lot.

Funds for clergy and staff.

Look into solar or wind power sources for energy. It's possible to get clean energy that we can purchase in certificates and be good stewards of the planet. Increasing our energy usage with air-conditioning we should look into these options.

Tree work and landscaping.

Driveway. (2)

Accessibility. (2)

Other physical plant maintenance- like ceiling in boiler room.

Railing and stairs by garage.

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

**4. Generally speaking, do you favor the parish conducting a capital campaign as outlined in the proposed plans?**

77 Yes

2 No

16 Yes, but with some concerns

Eighty-one percent are in favor of the campaign, with another 17% in favor with some concerns. Only 2% are opposed to the campaign. This is a sign that the church community is willing to support a campaign.

*Comments:*

I do not know if the congregation can support this level. I believe we are still in debt. I also hear about additional plans, e.g., bringing David on for more time, and I worry that the congregation cannot afford it.

I fully support this effort and would like to help financially if possible.

With the recent depletion of parish reserve funds, is it practical to proceed with a CC?

Knowing the church's current financial state, I fear that a capital campaign will interfere with the Stewardship campaign.

We need to take some steps to ensure our long-term financial health that many preclude A/C in the sanctuary.

\$400,000 is a huge investment. The capital campaign mentions that because the church lacks A/C it is losing revenue from funerals and weddings. It may also be losing opportunities to gain new parishioners. Is there some way to quantify that? The lost revenue from funerals and weddings should be easy enough, but what about lost opportunities to gain new parishioners?

Too much of the funds for capital campaign is expected to come from parishioners themselves. Some of the capital campaign money could be drawn from renting the downstairs space as a day care center, like it has been used in the past. This would provide a monthly stream of money from the profit that could be used for maintenance. Also, the availability of the parish hall as a rental facility for weddings, celebrations, etc. needs to be better advertised in the community and in the Cathedral newsletter. This would also provide more income on an ongoing basis for badly needed maintenance.

I would like to see paying down our mortgage a priority before taking on lesser priorities such as totally renovating our kitchen.

Absolutely necessary due to decades of deferred maintenance.

I'm not quite sure what a capital campaign involves.

Too long a time.

I'd like to see a comparison of the slate versus shingle roof. Cost alone is not enough for a decision.

I am afraid that the goal is too high. The money isn't there. It has to be a more modest goal.

**5. Please indicate the level of priority you would attach to each of the projects outlined in the proposed plans by checking the appropriate line under each heading. At present, they are listed in no particular order.**

*\*Select only one option per line and feel free to make comments (use an extra sheet if necessary).*

	PRIORITY				
	High	Medium	Low	Opposed	Lack Information
a. HVAC System	<u>72</u>	<u>15</u>	<u>4</u>	<u>1</u>	<u>2</u>
b. Eleven Stained Glass Windows	<u>27</u>	<u>42</u>	<u>20</u>	<u>0</u>	<u>2</u>
c. Roof – (also see question #6 for material options)	<u>86</u>	<u>7</u>	<u>2</u>	<u>0</u>	<u>1</u>
d. Stonework and Walkways	<u>31</u>	<u>42</u>	<u>15</u>	<u>1</u>	<u>2</u>
e. Kitchen	<u>27</u>	<u>39</u>	<u>22</u>	<u>1</u>	<u>2</u>

*Comments:*

My feelings are that we fix what is important first and work from that point.

If the stained glass isn't repaired it is going to shatter. One window is actually bowed - NOT good!

We can not continue to grow membership if visitors find the sanctuary uncomfortable for their worship experience. Personally, I do not feel the same in the summer months when we worship in the parish hall. We need to contain the leaks and that calls for urgent response to attend to the roof condition.

Regarding the roof, it would be helpful to have more information on the difference between slate and fiberglass shingles.

I don't oppose any of the proposed plans. I rate the roof and the stonework/walkways highest because not maintaining these items - I believe - will incur greater expense over time. Upgrading and repairing the kitchen and stained glass would be nice, but they could be put off a few more years if need be. The HVAC system I rate low because I'm uncertain as to its long-term benefit. A new HVAC would be nice, but will we see some of that investment offset by new revenue during the summer months from funerals and weddings? Or from gaining new parishioners? And how will adding an HVAC system change the interior of the church? Will it be seamless? Or will the aesthetics be ruined by sheet metal work running along the roof line? Regarding the roof - it is a must; however, what is the downside of using fiberglass shingle, or the upside? I imagine slate looks best and will last the longest, so that is my first choice.

From the case statement I can't tell which of the two roof options would be projected to last the longest. I would prefer the one with the longest life expectancy regardless of price.

I'd put the roof and HVAC at the very top of the list.

I think we should be focused on the serious maintenance issues and not confuse these with cosmetic issues and wish-list kinds of things. Cosmetic and wish-list things, I feel, should not be included as they bump up the cost to scary levels and they are not in line at all with our original goals - necessary repairs and improvements.

The kitchen could be cleaned rather than modernized and updated later. It is a bit old fashioned but that is not a major problem.

Roof - No knowledge of materials to make a choice.

Very hard to choose. I felt saying high on everything was too much. Certainly A., C., and E. for general care and to increase money. B. is so important too.

Just repair the existing roof.

We can do more patching on the roof if we have to.

I would like another roof inspection to check the flat roofs and that the existing slate roof can't be repaired instead of replaced. What do we need to stop the water damage?

Surprised to see stained glass windows in plans since they were restored in previous campaign.

Concerns about the aesthetic and comfort of the parish hall – parish hall is freezing with A/C.

There is a third option of recycled slate with rubber that could be priced out. If money were not a problem, slate is the obvious choice. If not the other is a good option.

There are roofing opportunities that emulate slate, rubber for example, that are better than fiberglass shingles and less expensive than slate.

**6. Which of the options for roof replacement would you prefer? (choose one)**

31 Slate Roof Replacement – Option A – Slate

52 Slate Roof Replacement – Option B – Fiberglass Shingle

Sixty-three percent of respondents favor Option B – Fiberglass Shingle.

**7. If the proposed total goal of \$900,000 cannot be fully funded by a capital campaign, how would you feel if the parish were to assume prudent long-term debt to ensure completion of these proposed plans?**

13 Acceptable    62 Undesirable, but acceptable    18 Unacceptable

More than half (67%) responded that it is undesirable, but acceptable to assume long-term debt; another 14% said it is acceptable. Nineteen percent responded that long-term debt is unacceptable.

*Comments:*

I'm not familiar with Ascension's finances; feel that the people could better help with that question.

Look for pledges from community individuals....say \$ 100/month for 5 years = \$6,000 per person.

Let's hope that the membership would continue to grow and support the project.

The church currently carries a large debt, which is a major part of monthly expenses. (4)

Some projects, such as the roof, seem to justify long-term debt more than others.

Assuming more debt should be unthinkable.

Acceptable with caveats: I think the loan should be at a very conservative debt-to-annual-cash-flow multiple, and I think the amount should be payable in 10 years at a fixed rate. Also, if the country hits a recession and donations drop, would the Diocese be able to help us meet our obligations?

I have seen other parishes get themselves into serious trouble with debt, so I'm very wary of doing this.

Our mortgage debt from the last capital campaign has hindered Ascension's ability to devote funding to other priorities such as outreach and mission and staff support.

We are not in a position to assume long-term debt.

I'm not sure how to respond to this because I'm not sure of the cash flow and the how Ascension could pay the debt off.

Would need to understand more about this. Also would depend on amount.

I don't think we can carry such a large loan in addition to the one we already have.

Less than ideal, but acceptable.

Debt service must be more than covered by budgetary resources, phased options could be considered.

**8. In your opinion, what major positive factors does the parish have in its favor for the proposed campaign?**

*Comments:*

Need; bad conditions caused by age and usage requires maintenance. This will eliminate the possibilities of "break-downs" and the expenses to minimally fix things. (7)

I believe the church has everything to gain from these positive factors. If we can make the structure match the enthusiasm and heart on the inside of the church - it will only increase what we can do for folks in the community in years to come. (6)

To make the church more safe and comfortable for the parish family.

Great community, historic church, excellent location for future visibility and growth. (3)

Long-term benefits.

The parish is faithful, committed, dedicated and generous. (8)

Loyal members and friends. (5)

An energetic, spiritual community. (9)

We are growing/new younger families. (16)

There is enthusiasm and support from a broad section of the members. (7)

Installation of an HVAC system will make us able to worship in the nave all year, likely increasing summer attendance and hopefully increased plate offering. Installing HVAC downstairs will increase the health of all who utilize the space! Replacing the roof and fixing the stonework and walkways will hopefully decrease our annual spending on buildings and grounds. Improving the kitchen will encourage new ministries and a possible increase in rentals! (2)

Dedicated staff and leadership. (7)

There is somewhat of an atmosphere of "the little engine that could".

I think we have a strong community, and hopefully our community will hold a reasonably common/shared vision of the church's needs in a capital campaign. I also think we have friends outside the immediate congregation who may be willing to support this place which has supported so many of us. (4)

Prudent managers.

The neighborhood of downtown Silver Spring is growing and the church should prepare and repair its appearance to meet spiritual needs of our growing community. (2)

Emergency contributions. (2)

I think these modifications are very workable and comprehensible. We're not proposing anything grandiose; just making our current space even better. This is a "hard-nosed" proposal.

Committed, engaged members. (2)

Realistic goals.

A welcoming community, filled with energy and the spirit.

In my observation, the congregation really appreciates the buildings and their various spaces and would like to use them more fully. (3)

All of our usual givers will give as much as they can. It is possible to sway the now and then givers to give more often.

Well educated congregation and community involvement.

Wanting to focus more on ministry and relieving expenses could help us do this.

Could earn money renting the space/potential for increased revenue. (3)

The children's programs.

Stable core membership.

We have been through this before.

New young energy in the congregation and working in leadership roles.

Many people weren't here for the last campaign.

Economy is improving.

The DNA of our parish is active and inclusive.

## **9. What problems, if any, do you foresee for this project?**

### *Comments:*

Having worship preempted by calls for money. (2)

Economic concerns. (2)

We aren't a large parish (and have not deep pockets), and this is a lot of money to raise. (2)

Prioritizing what we can get done feasibly/deciding on projects. (4)

Large cost, vulnerable community with limited resources. (4)

The duration of work and how it will affect access and worship/activities.

Fundraising always strikes emotional chords with some.



Long haul; financial commitment.

Current challenges meeting yearly budget. (4)

Many people are already stretched thin. (2)

If we fail to promote and maintain the collective positive factors then it would be an uphill battle for the project to succeed.

More recent members not understanding the importance of regular giving. (2)

I fear we won't be able to raise all of the funds. (6)

Keeping members involved in the vision. Not having enough big donors from which to expect funds over the long haul.

Are there contingencies for unforeseen problems that come up during the renovation that exceed current cost estimates? (9)

I guess I just wonder if people will be willing to contribute at this level, along with contributing for the church's ongoing needs.

Affording both stewardship and a capital campaign. (2)

Pledges not meeting their financial commitments to the project. (2)

I am very worried that some members of the church will push for a slate roof for no good reason. I think that a fiberglass shingle roof would be very prudent. I also worry about whether members will be worried about the times when various spaces around the church will be unusable.

Playing bad movies from the last capital campaign. Fear of failing and continuing to think and act out of a scarcity mentality, rather than acting and thinking out of a hope and abundance mentality.

The parish has a culture of not giving financially as much as it could.

We are mixing in optional wish list things with essential maintenance. This is a big mistake.

It's a lot of money. (6)

The church population could be very different in three years and so sustainability of support over time could be a problem.

The only "problem" that I see is TIME.

Too many changes at once.

My impression is that we are overly dependent on a couple of generous pledgers; we need a broader base for giving.

The church is growing but the population cannot shoulder the debt.

Clear project management.

Our ethos of losing track of the details. We will need to be diligent to continue to work at getting pledges completed.

Newer member with young families will not be able to make large gifts.

Not sure there has been a comprehensive needs assessment; the current assessment began with a desired focus.

**10. What added ideas or suggestions do you have which might be helpful to the leadership in making this important decision?**

*Comments:*

Slate shingles are very durable and would be the best choice. We should fix the roof leakage and fix the shingles that are currently broken, not put a completely new slate roof on. What is also very important is that the yearly budget needs to include having a roof person check and repair the roof for any cracked shingles on a yearly basis. This maintenance hasn't been done in the past, as evidenced by the slate shingles now falling off and causing roof leakage.

Prayer! Lots of prayer! (4)

I am very impressed with all our efforts with creativity in using the talent of our people.

Look for pledges from community individuals....say \$100/month for five years = \$6,000 per person.

Include allowance for unforeseen conditions.

Priority for reserve and fixing air problem on lower level of building. Create budget that addresses program needs/ growth.

Continue to talk about the plans and get feedback.

We need to think through outside opportunities for raising money for the campaign. I do not think the means for the entire campaign will be found within the congregation. So the church should consider what assets it has beyond its presence as a place of worship that are valuable to the community. The first thing that comes to mind along those lines is the downstairs space and parish hall. Could the downstairs space be rented regularly during the week to a program or pre-school? But there are many other possibilities that could be considered.

Do not take on additional debt. Consider debt reduction as a part of the capital campaign.

It seems like it would be helpful to calculate (if possible) the cost of not doing the campaign. For example, would failure to fix the roof lead to more expensive problems down the road (due to the mold, water damage etc.)? This would help us put things in perspective.

I just think it's important to have a clear vision of what our community (and space) will look like and how we'll benefit. And I think it's key that we be positive and grateful about people's generosity.

It's like buying a church organ... nobody can afford it but it has to be done.

Work with a project manager that has experience with church construction/renovation (don't go cheap on hiring our advocate!). Write out a clear proposal for the congregation, outlining all the steps and costs in the project. Emphasize benefits (will reduce future maintenance costs, attract attendance, provide new revenue sources, or will simply improve the appearance/atmosphere), but don't over promise on turnaround times and costs - set the bar low and enjoy the congregation's relief when the project ends early and under the estimated price.

Explain all expenditures along the way. For example, how was the new choir room renovation paid when we were told our reserves are so low?

I think it's wise to make sure the church can be used for a wide variety of functions.

Know that many are doing their best in donations in an uncertain financial environment and aging congregation. Additional fundraising may need to be from many smaller gifts than the suggested chart on giving.

The leadership should consider that installing new HVAC will require additional maintenance costs that need to be added to the annual budget.

I would strongly, strongly, favor slate for the roof but given the cost of slate, I think we should explore the cost of using one of the modern synthetic slate-look shingles. These are cheaper than slate, though more expensive than fiberglass; they look like slate, but they're lighter (less stress on the structure) and they're made of recycled materials. Montgomery County's preservation authority should have information on suitable types, or I'd be happy to track down sources and more information.

That they be voices of hope, excitement, energy, vision, and success. Rather than voices of fear, reluctance, looking backward and lamenting the past, and doom and gloom about what the parish can raise and achieve.

Include only necessary cost goals and then use any excess to create an account for emergencies.

Adopt a three, five and eight year plan to make the process manageable...and to give the church time to raise money.

Is it fair to assume, from the Case Statement, that a three-year funding period would be involved? That is certainly a significant amount of time. Perhaps the first item addressed, whatever it is, could be one that will show clear progress/achievement in a relatively short time, to keep momentum going.

Fix the things that can lead to more damage or repairs, like the roof. Put off air conditioning as attendance is likely to be low in the summer anyway.

Is it possible to make it so that if we give the proper information to the church that our monthly donations can be taken directly out of our bank accounts each month? I feel that would be ideal.

I didn't answer about the roof because I don't know what fiberglass shingles look like. They don't last as long as slate, but we've found it difficult to find roofers willing to work on our slate roof, and the difference in cost is considerable. I said that long-term debt is undesirable but acceptable, but I think it should be the measure of last resort. Paying off the debt would be money that could otherwise go into a long-term capital fund.

Be realistic about what we can actually take on. While faith is good, in this case, so hard core assessments are necessary.

I'd like to see a projection of before and after. How it will affect our membership?

Stick to the plan and ideas that have been discussed. Don't get distracted by things that come up.

Communication and getting buy-in to the final plan. Try to get early giving so we can start on projects- getting the air-conditioning done early would cause lots of excitement.

This process is very different than the last in a very good way.

Clarity about the primary goal and make it about that goal. Prioritize what projects are next on the list.

Letters are always good beyond emails - emails don't always get read. Keep communicating details on Sundays.



Highlight what things will be like when we achieve our goal.

Talk about budget pressure is related to capital needs; be realistic fundraising – listen to realistic goal projections.

Sell it and package it in good things- honestly. We know about the bad, we need to remind people of the good that happened in the last campaign and how to handle the burden of debt- we have accommodated more people and have had the space to grow. Think about where the nursery used to be. Stress how our annual burden of deferred maintenance will go away if we fix things.

Take the comments from the house meetings as to the “why” we are doing this. Stress that it is to ensure we are here for the future and your children.

Consider long-term costs. Insulation upgrades, solar, and other options.

### **Leadership**

#### **11. If asked, would you be willing to work on a committee in support of the proposed capital campaign?**

22 Yes      33 No      39 Not sure at this time

Twenty-three percent would be willing at this early date to volunteer. Another 42% are not sure at this time and may be persuaded to participate as the campaign plans are formulated. This is a relatively good response at this stage in the process. It appears likely that an adequate number of workers would be attracted to the campaign.

#### **12. Hypothetically, if you were a chair, who would you select to serve with you?**

Marilyn Abbott  
Annette Achille  
Monica Allen  
Cathy Beard  
Mark Bolgiano  
Ed Bordley  
Marta Brenden  
Annie Brown  
Warren Buckingham  
Peter Chang  
Emily Clough  
Kevin Connell  
Bob Cosby  
Jacki Coyle

Ed Crooke  
Brenda Freeman  
Steve Fromyer  
Libbie Griffin  
Peter Hardin  
Chris Heffner  
Christopher Hinton  
Brett Holt  
Chris Parker Hunt  
Dana Jung  
Maybelle Kagy  
Lia Kvatum  
Enid LaGesse  
Elena Larsen  
Anne LeVeque  
Jocelyn Lindsay  
Chris Llewelyn  
Dick Marks  
Diane Martin  
Karen MacPherson  
Lynda McCulloch  
Marty Milam  
Cristina Miller  
Dick Morris  
Sharon Murphy  
Kate Rohrbaugh  
Roger Rohrbaugh  
Lynn Schattschneider  
Bill Schauman  
Carol Schwobel  
Miata Sherman  
Joe Simpich  
Jacki Smith  
Emily Snow  
Joey Snow  
Drew Snyder  
Joan Thomas  
David Todd  
Diane Townsend  
Wardell Townsend  
Jeannette Witter  
Jim Wolf  
Evangeline Wotorson  
Denise Young

Truthfully I think that we have two great folks in that role now. I wouldn't choose differently.

Two new members.

I would prefer individuals who are enthusiastic and committed to the cause.

Try to bring in a friend with fundraising experience if they were willing to help pro bono.

The "smart" people and the emotional people, and the undecided (young and old).

We have such a great group of folks, but I don't know what everyone's gifts are when it comes to supporting a capital campaign.

Large and small donors, those who pledge and those who don't.

A combination of doers (events, outreach, hands on work) and those with leadership giving capacity - to ensure the campaign is a success. It has to be owned by the entire parish - I can't be seen as something that a small subset of people are responsible for.

Someone who is fiscally responsible.

It depends on the committee, but in general a committee needs competent, open-minded people, who are good listeners and willing to work.

To be candid, I'm not sure what the duties of the committee would be--fund-raising, of course, but also keeping the congregation informed of progress and issues as they arise. So this effort would seem well-served by outgoing people who have a good deal of energy and stamina.

A representative from each population: clergy, older members, one from each group (men's, Sunday school, choir, outreach, etc.).

A mixed group representing different sectors of the community.

### **Campaign Timing**

**13. Does a proposed solicitation period for pledges in late 2015/early 2016 seem appropriate to you?**

48 Yes      9 No      34 No strong feeling

More than half of the respondents, 53%, are in favor of the proposed timing. Thirty-seven percent expressed no strong feeling one way or another. The remaining 10% were opposed to the campaign timing. This is an endorsement that a campaign could proceed as scheduled.



**Gift Potential**

**14. Do you think a goal of \$900,000 (as outlined in the proposed plans) can be raised in gifts and pledges?**

19 Yes      12 No      62 Don't Know

Only 20% believe the goal can be attained, while 67% have no opinion if it can be reached. Another 13% do not believe the goal can be attained. Normally, we like to see at least a majority believing the goal is feasible. Generally when less than half are confident about the projected goal, the proposed goal is usually too ambitious.

*If no, how much do you think can be raised?*

\$250,000

\$300,000 to \$400,000 (2)

\$450,000

\$500,000 (4)

\$600,000 (3)

Half the amount.

**15. If convinced of the need, would you be willing to contribute to this proposed campaign?  
(All gifts, regardless of size, are needed and are important to the success of the proposed campaign.)**

82 Yes      5 No      7 Not sure at this time

Eighty-seven percent would be willing at this early date to contribute to the campaign, while another 8% expressed that they are not sure at this time. Only 5% indicated a negative response. This is positive and an indication that the campaign can proceed.

**16. If "yes," please estimate your possible total range of giving. Gifts potentially could be paid over a several-year period. *This is not a pledge or in any way binding.***

<u>  12  </u> \$500 or less	<u>  17  </u> \$500 to \$1,000
<u>  22  </u> \$1,000 to \$3,000	<u>  14  </u> \$3,000 to \$5,000
<u>   8  </u> \$5,000 to \$10,000	<u>   3  </u> \$10,000 to \$15,000
<u>   3  </u> \$15,000 to \$25,000	<u>   2  </u> \$25,000 to \$50,000
<u>   1  </u> \$50,000 to \$75,000	<u>   0  </u> \$75,000 to \$100,000
<u>   0  </u> \$100,000 to \$150,000	<u>   0  </u> \$150,000 and above

**Typical Gifts Essential to the Success  
of a \$900,000 Capital Campaign**

Size of Gift	# Needed	Gifts Indicated in Study*
\$150,000	1	0
\$100,000	1	0
\$75,000	1	1
\$50,000	2	2
\$25,000	5	3
\$15,000	8	3
\$10,000	9	8
\$5,000	12	14
\$3,000	15	22
\$1,000	18	17
\$500 and below	Many	12

\*Using the high range estimate

Respondents projected donations ranging from a low of approximately \$320,500 to a high of \$534,000. While not indicated in the chart above, not all gift amounts were given within a range as presented. Some were given as singular amounts, e.g., \$5,000, instead of \$3,000 to \$5,000. The high and low estimates have been adjusted accordingly. These early estimates fall short of supporting \$900,000 as a primary goal.

## Planned Giving

**17. In addition to making a gift to the proposed campaign, some parishioners may wish to explore planned or legacy gifts. Check the blank next to the item(s) of interest. Materials will be sent to you from the Episcopal Church Foundation via e-mail.**

- 6   Make a gift to your parish through a bequest in your will.
- 7   Create a charitable gift annuity (minimum gift of \$5,000).  
Benefits of a charitable gift annuity could include:
- receive guaranteed income for life (i.e. current rates of approximately 4.7% annually at age 65, approximately 5.8% annually at age 75)
  - receive an income tax deduction now for the gift portion
  - receive some tax-free income from the investment until your life expectancy age
  - possibly reduce applicable estate and inheritance taxes
  - enjoy the satisfaction that at the death of the final income beneficiary, the remaining principal would go to an Episcopal congregation or entity you designate
- 1   Create a Charitable Remainder Trust with appreciated assets (minimum gift of \$100,000)
- 2   Create a Pooled Income Fund gift for life (minimum gift of \$2,500)
- 1   Donate appreciated real property such as a house, vacation home, farm or business
- 5   Send me the *Overview of Planned Giving* brochure which explains planned gift options further
- 3   Add me to the Episcopal Church Foundation e-newsletter on estate planning.

**17a.   6   Episcopal Church of the Ascension is already in my will or estate plans.**

Six individuals have already included the church in their estate plans. Several others have indicated they would welcome information. They will receive information confidentially from the Episcopal Church Foundation.

## **A Final Word**

The Episcopal Church Foundation thanks the leadership of Episcopal Church of the Ascension for the opportunity to work with the parish family. We enjoyed our work on your behalf and would welcome the opportunity to be of service.

Thank you, and best wishes.

*Section Three:*

**Appendix I:  
Tentative Case Statement**