

Discarding the Myth of Scarcity: Planning a Successful Capital Campaign

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Congregational Fundraising Services

Established in 1985

Fee for Services

- We strengthen the Unitarian Universalist Association by working as partners with congregations.
- We motivate, support, and provide structure to help clarify mission and achieve goals.
- With our guidance, strategic plans and leadership skills are developed to convert dreams to reality.

Program Portfolio

- Strategic planning
- Annual stewardship drives
- Capital campaigns
- Endowment program development

Congregational Fundraising Services

Wayne B. Clark, Director

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Martha Easter-Wells

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Jerry King

Frankie Price-Stern

David Rickard

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12 Keys

1. Professional guidance and coaching
2. Strategic plan
3. Executive steering committee
4. Architect
5. Preliminary congregational support
6. Financial feasibility study

12 Keys Continued

7. Full-list evaluation and essential gifts chart
8. Visiting stewards
9. Compelling case statement and comprehensive communication program
10. Orientation workshops
11. Leadership reception and fellowship event
12. Follow up and monitor

Building Loan Program

- Provides affordable financing to purchase a building or to expand or renovate existing facilities
- “Financing Your Spiritual Home:” Always shop locally first
- Makes loans from \$50,000 to \$750,000 at the 7-year Treasuries plus 2%
(www.federalreserve.gov/releases/h15)
- Loan amortization: 15 years, 20 years or 25 years

■ Lending guidelines:

- *Financial pledges = at least 3x annual giving
- *Annual debt service cannot exceed 25% of annual operating income
- *Five-year growth plan
- *Must maintain APF fair share status
- *Phase I Environmental Study
- *Property and liability insurance coverage

www.uua.org/cde/fundraising/building

Loan Guarantee Program

- Encourages expansion and/or renovations
- 50% of bank loan up to \$375,000
- Loan guarantee guidelines:
 - * Financial pledges=at least 3x annual giving
 - * Annual debt service cannot exceed 25% of annual operating income
 - * Five-year growth plan
 - * Maintain APF fair share status
 - * Phase I Environmental Study
 - * Property and liability insurance coverage

First Home Grant Program

- Helps purchase *first* piece of land and/or building
- Grant=10% of financial pledges up to \$25,000
- Grant guidelines:
 - *Financial pledges=at least 3x annual giving
 - *Annual debt service cannot exceed 25% of annual operating income
 - *Five-year growth plan
 - *Maintain APF fair share status
 - *Phase I Environmental Study
 - *Property and liability insurance coverage

Site Acquisition Program

- UUA, in consultation with a local congregation, will purchase a site
- Demographics indicate high potential for growth
- UUA will hold title until the congregation:
 - *Agrees to locate on the site
 - *Commits to financial, staff+program growth
 - *Commits to build within 5 years

- **Congregational contribution:**
 - * One-third of site cost up to \$375,000 plus full amount of site cost beyond \$1,125,000
 - * 50% of principal + interest during term
 - * 2% of loan amount (Phase I + closing)

- **UUA contribution:**
 - * Loan 2/3 of site cost up to \$750,000
 - * 50% of principal + interest during term

- Underwriting conditions are the same as with loan, guarantee, and grant
 - * Financial commitments=3x annual giving
 - * Debt service not more than 25% of income
 - * Five-year growth plan
 - * APF fair share
 - * Phase I Environmental Study
 - * Property and liability insurance

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