

**Capital Campaigns:
If You Build it, They Will Come . . .
But Will They Stay?
with
Wayne B. Clark**

**General Assembly 2006
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Workshop Goals

1. Building Projects and Growth

2. Ten Stages of a Building Project

3. Questions and Answers

Workshop material is excerpted from

**Beyond Fundraising:
The Complete Guide to
Congregational Stewardship**

By

Wayne B. Clark

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Accommodations?

Unitarian Universalist Association Congregational Fundraising Services

Wayne B. Clark, Director
Amanda Schuber, Administrator

Carole Czujko, NY

Rev. Tricia Hart, PA

Frankie Price Stern, NC

Aggie Sweeney, WA

Martha Easter-Wells, IA

Tamsin Kemos, ME

David Rickard, AR

Larry Wheeler, GA

Background Questions

How many from congregations whose weekly worship attendance averages:

___ Up to 50 congregants

___ Between 50 and 100

___ Between 150 and 350

___ 350 to 500+

More Questions

How many want to launch a capital campaign

___ Within the next five years

___ Within the next two years

___ As soon as possible

How many are planning a project costing

___ Up to 300,000

___ Between \$300,000 and \$600,000

___ In excess of \$600,000

Five Criteria to Insure Healthy Congregational Growth

1. Endorse a systemic definition of growth

- Numerical growth**
- Maturation growth**
- Organic growth**
- Incarnational growth**

2. Plan for additional programs and staffing

- **Develop a welcoming program**
- **Increase lifespan religious education offerings**
- **Create a small group ministry program**
- **Develop global ministries**
- **Match volunteers' skills with tasks**
- **Create and fill new staff positions**

3. Develop a building project that reflects congregational vision

- **Inclusive effort with lots of buy-in**
- **Clarity will help to limit options**
- **Anticipate conflict + find ways to manage it**

4. Harness new energy by getting many people involved

- **Going it alone is efficient**
- **Recruit many people to take on small pieces of responsibility**
- **The process will be messy**

5. Develop a growth plan

- **Numerical, maturational, organic, and incarnational**
- **Consider taking on some debt**

Preparing for a Building Project

Stage One: An Assessment Visit

- **Instead of responding to RFPs**
- **Who are we? Where are we going?**
- **How to get from here to there**
- **How might the UUA be helpful?**

Stage Two: Organize the leadership

- **Be true to your mission**
- **Ensure widespread participation**
- **Maintain continuity with one steering committee**
- **Define responsibility and authority**
- **Recruit the steering committee**

Stage Three: Select an Organizing Model

- **Large projects of more than \$600,000**
- **Midsize projects between \$300,000 and \$600,000**
- **Small projects costing up to \$300,000**

Large Project

- **Chair**
- **Secretary**
- **Publicity**
- **Strategic-planning**
- **Property**
- **Capital campaign**
- **Finance**
- **Building plans**
- **Construction**
- **Furnishings**

Small Project

- **Governing body chair**
- **Religious educator**
- **Capital campaign**
- **Finance**
- **Member-at-large**

Stage Four: Begin Steering Committee Work

- **Select an architect**
- **Develop corresponding financial projections**
- **Estimate fourth-year giving**

Stage Five: Share Building Plans and Financial Projections

- **Building plans**
 - * **The gold plan**
 - * **The silver plan**
 - * **The turquoise plan**
- **Schematic design and cost estimate**

Stage Six:

Conduct a Financial Feasibility Study

- **Importance of a fundraising consultant**
- **Confidential interviews with 15-20% of donors**
- **How knowledgeable?**
- **How excited?**
- **Any concerns?**
- **How much money likely to be contributed?**
- **Ready to launch a campaign?**

Stage Seven: Launch a Capital Campaign

- **Four most important components**
 - * **Clear and compelling case**
 - * **Comprehensive publicity plan**
 - * **Orientation workshops for visiting stewards**
 - * **Stewardship conversations**

- **Financing**
 - * **Local banks**
 - * **UUA loans, guarantees, and grants**

Stage Eight: Revise the Building Plans . . . If Necessary

- **Complete the stewardship conversations**
- **Determine financing**
- **Revise design development plans**
- **Prepare construction documents**
- **Obtain bids or negotiated proposals**

Stage Nine: Begin Construction

- **Finally!**
- **Manage construction**
- **Develop a spirit of teamwork**

Stage Ten: Celebrate as Often as Possible

- **Site dedication**
- **Presentation of plans**
- **Construction contract**
- **Groundbreaking ceremony**
- **Time capsule**
- **Departure day**
- **Moving day**
- **Commemorative tiles**
- **Open House**
- **Dedication ceremony**
- **Sow seeds**

Questions and Answers

For More Information

www.uua.org/cde/fundraising