

Pre-Campaign Assessment

Epworth United Methodist Church
Indianapolis, Indiana
August 11, 2011



Church Growth Services
South Bend, Indiana

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Project No. 1984

Prepared By

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INTRODUCTION

This Pre-Campaign Study, commissioned by the Epworth United Methodist Church, evaluated the timing, strategy and funding options for a renovation and addition to the existing facility.

The primary purpose of this study was to discover the congregation's readiness along with their financial capability and willingness to fund the project. The preliminary direction of this study was outlined in meetings between staff, lay leaders, the former senior pastor and Church Growth Services. Specifically, Church Growth Services focused its attention on the congregation's...

- A. acceptance of this project.
- B. understanding regarding the urgency for this project.
- C. potential financial participation in a capital campaign.
- D. attitudes toward ministry and leadership.

Study Objectives

Based on the above, Church Growth Services identified the following objectives:

1. Determine the congregation's perception of this project in terms of urgency and need.
2. Determine the general acceptance of a capital campaign as well as any related components that must be in place in order to achieve a successful campaign outcome.
3. Determine the fundamental perceptions about the church that are held by those who consider Epworth United Methodist Church their home church and ascertain if these views are contrary to a successful capital campaign.
4. Position the congregation for a stewardship journey that will eventually lead to the completion of the above mentioned project as well as develop mature stewards for the Kingdom.

Study Methodology

The basic information for this study was gathered from:

1. A series of reports including various church statistical documents, financial records and other miscellaneous items.
2. Various meetings with the staff, BFTF and key leaders.
3. Several congregational Input Forums.
4. Two rounds of confidential personal interviews.
5. A congregational survey.
6. The principals of Church Growth Services who met frequently to analyze the findings and to oversee the study's direction.

The recommendations in this report rest heavily on the interviews and survey responses which represent the core of this study. The Church Growth Services team has engaged in extensive internal review and discussion in the process of codifying interview results and filtering all team members' observations against our study of background documents. In the final analysis, however, we primarily based our recommendations on what we were told about Epworth United Methodist Church by those individuals who attend.

Church Growth Services' Conclusion

We are certainly living in a time of great financial anxiety. It seems as if every day there is troubling news of increasing financial instability in our world-wide economic system. But regardless of what may or may not happen, we must find our security in the knowledge that God is absolutely sovereign. And, while our circumstances may cause us great concern, He desires that we remain faithful stewards.

No doubt many at Epworth recall the days of strong demand in manufacturing and the peak of the Dow Jones just several years ago. But we must also remember that God does not call us to be stewards of what we used to have. He calls us to be stewards of what He gives us today.

There will always be a cost to renovate a church facility. There will also be a real cost in not proceeding with the repairs and renovation. Either way, church leaders must become the advocates of those who need to hear the Gospel of Jesus Christ. Either

way, men and women, who were the spiritual pioneers of this church, need to mentor younger men and women in biblical stewardship so they can become the new spiritual pioneers of today. Either way, spiritually mature families must continue to model generous living for the spiritually growing families. Either way, God demands our complete and total surrender to His Son, Jesus Christ. And it is in the total surrender to Jesus Christ that we find the essence of stewardship.

The major themes from the household interviews and the congregation-wide survey indicate there is adequate support for a capital campaign to fund Phase One. Therefore, go and accomplish your goal. And give the glory to God.

Church Growth Services
South Bend, Indiana
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EXECUTIVE SUMMARY

This Summary gives church leaders an overview of the recommendations contained throughout this study.

CONGREGATIONAL READINESS TO ACCOMPLISH A CAPITAL PROJECT

Recommendations

1. Continue to meet with people to hear and understand their opinions toward the project. Teach how the project will increase the effectiveness of ministry. Be careful when stating that the renovation will help draw new people to Epworth. This may or may not be true.
2. Develop different ways of communicating the above. One idea might be to create an "Information Center" open every Sunday morning beginning immediately. While the area might be boldly decorated with construction barricades and "flashing orange lights" the critical element is to staff the Information Center with knowledgeable volunteers who are trained to listen and answer basic questions rather than to sell and defend the plan.
3. Determine the level of debt, if any, to be incurred for the project. Communicate this level of debt, if any, to the congregation prior to the launch of the campaign.
4. Engage people in prayer. The following spiritual concerns might be considered...
 - A. That God would maintain a spirit of unity during the total process.
 - B. That God would continue to birth a spirit of generosity among all who call Epworth United Methodist Church their church.

CAMPAIGN VIABILITY

Recommendations

1. Assure the congregation that leaders will develop and communicate a conservative funding plan for the project. This funding plan should include...
 - A. Announcement of the campaign goal of \$1,000,000.

- B. Acknowledgement of any anticipated borrowing and what that amount might be. Leaders should also communicate that the more the church receives in gifts the less the church will have to borrow (if borrowing occurs).
 - C. Announcement that the amount borrowed will be paid off before any new projects begin.
 - D. Communication via regular and thorough updates to the congregation concerning the progress of campaign receipts and building details.
2. Present a series of messages focusing on biblical stewardship.
 3. Conduct multiple 'Tax Wise Giving' and 'Creative Giving' workshops throughout the campaign.

CAMPAIGN GOALS

Recommendations

1. The renovation project will need strong champions including the new senior pastor, pastoral staff, lay leaders and ministry workers.
2. Leaders must define sacrificial giving through personal example. While it is never appropriate to reveal gift size, the congregation must still know that this project is vitally important to leaders and that they are willing to actually alter their financial lifestyles to see Phase 1 become reality. Key campaign leaders must therefore communicate the degree of sacrifice they are prayerfully considering.
3. A detailed Chart of Gifts must be created for campaign teaching and implementation.
4. Leaders must agree on the final campaign goal and express it through the Chart of Gifts.

Stretch goals are useful in community fund raising campaigns but they can be devastating for church campaigns. Failure to obtain a stretch goal often causes people to question God and whether or not His will was known by leaders. A pervasive sense of failure and discouragement comes upon the congregation even when the "base" goal is achieved but the "stretch" goal is just slightly undersubscribed. Therefore, it is absolutely critical that leaders carefully and prayerfully consider the goal for this campaign.

5. Provisions must be made for gifts in each of the following categories:
 - A. One-time gifts (immediate lump sums of cash).
 - B. Three-year regular increased stewardship commitments given weekly, monthly, quarterly or annually.
 - C. Non-cash gifts such as gifts of securities, real estate or other property.
 - D. In-kind gifts and gifts of labor should be solicited after the campaign commitment cards have been handed in.
6. Campaign leaders will want to consider asking key church leaders, loyal workers and spouses to pray about their sacrificial commitment before asking the congregation to pray about their gift. The call for leaders to pray about their gift can be critical to the success of a campaign and generates approximately 60% - 70% of the campaign goal. It is estimated that approximately 30% of the adult congregation might be invited to a gathering where people receive information as well as the challenge to spend time in prayer *before* the congregation is challenged to pray.
7. A project of this magnitude would not proceed without a capital campaign. Therefore, leaders and congregants must see a successful capital campaign as a critical step in the overall progress of this ministry. Failure to achieve the required capital campaign goal is not an option.
8. Stewardship campaign goals are always set in the context of a more comprehensive vision. Throughout the campaign, the focus needs to continually remain on "changed lives." New church facilities are only tools for the real work of ministry. If leaders will continue to articulate a clear vision as well as the ministry benefits of the project, Church Growth Services believes that the people will do everything they can to respond.

CAMPAIGN STRUCTURE AND PROCESS

Recommendations

1. Church leaders and workers should be briefed on all aspects of the project and the campaign prior to the launch. Those with questions may need to spend additional time with the BFTF. Again, the intent is not to 'sell' but to listen to concerns.

2. The teaching and challenge of biblical stewardship should not be limited to adults only. All age groups should be touched by the campaign and they should also be given the opportunity and the encouragement to participate.
3. Multiple "Tax-Wise Giving Seminars" and "Creative Giving Seminars" (called "Finding Ways to Give in Tough Economic Times") should be conducted for the entire congregation. Providing relevant information regarding tax advantaged ways of making major gifts will be essential for those blessed with appreciated assets (stocks, property, etc.). On the other end of the income continuum, helping congregants discover ways to give is essential for those who daily feel financial pressure in their lives.
4. Campaign communication must be consistent and delivered through a variety of channels. This will include sermon messages, small group study and the distribution of printed materials. It might also include video, drama, the church's website, emails, and more.
5. The campaign should be delivered through the church's existing networks. This is especially true for small group presentations and spiritual emphasis. This presupposes that all leaders are well versed on the project and completely on board.
6. Most, if not all, of the campaign communication materials must be developed by volunteers with staff oversight.
7. It is essential that the campaign leadership team and the church council take the primary responsibility for the success of this campaign. The senior pastor, while brand new, can and should teach the biblical teachings of generous living. However, the campaign and the related revised project cannot be viewed as the pastor's agenda if this campaign is to be successful.
8. Congregants must be taught that pledges can be changed at any time during the three year giving period. Blank "revised" pledge cards must be included in the campaign booklet.
9. Church leaders must stop asking for financial gifts for other projects over the next three years.

SCHEDULE/TIMETABLE

Recommendations

1. Slowly proceed with a capital campaign beginning immediately with preparation and training.
2. Develop a campaign timeline so that all might see 'the big picture' as well as the individual key events of the campaign. A campaign visual outlining these key events is included in this study.
3. Segment the campaign into three phases (there will be a certain amount of overlap among these phases):
 - A. A time of preparation for volunteer campaign leaders
 - B. Advance commitments (from staff, leaders, loyal workers and those with the gift of giving)
 - C. Congregational commitments
4. Provide ample time for those who might consider significant gifts to the project.
5. Determine that the campaign will become the focal point of the church calendar.
6. Celebrate the campaign results in December 2011.

1. **Member/Constituent Ratio**

Member	Non-Member
85.7%	14.3%

2. **Tenure – Number of Years Attending**

0-1 Year	6.5%
2-3 Years	8.4%
4-7 Years	14.9%
8-10 Years	7.1%
11-20 Years	27.9%
20+ Years	35.1%

4. **Age Comparison**

18-24	1.9%
25-34	9.0%
35-44	6.5%
45-54	9.0%
55-64	30.3%
65-74	11.6%
75-84	20.0%
85 +	11.6%

5. **Occupational Status**

Full-Time Employed	35.7%
Part-Time	15.6%
College Student	1.9%
Homemaker	9.7%
Retired	34.4%
Seeking	2.6%

6. **Income Categories:**

0-15k	2.2%
15-25k	12.1%
25-35k	8.8%
35-50k	24.2%
50-75k	17.6%
75-100k	16.5%
100-150k	11.0%
150k+	7.7%

7. I am satisfied with the level of communication I receive from church leaders on important church issues.

Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
31.6%	56.1%	6.5%	4.5%	1.3%

8. I have confidence in our church leadership as they give direction to our ministries.

Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
33.6%	50.0%	13.8%	1.3%	1.3%

9. I attended the most recent informational meeting on Sunday, June 5.

Yes	No
52.9%	47.1%

10. I have a clear understanding of the revised building project (Phase 1) as presented by church leaders.

Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
27.9%	50.6%	18.8%	2.6%	0.0%

11. Phase 1, as outlined by our leaders, represents a wise investment of funds for the future of our church.

Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
22.4%	46.7%	25.7%	2.6%	2.6%

12. If necessary, I am open to a reasonable amount of debt to help fund Phase 1.

Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
15.0%	45.8%	31.4%	5.9%	2.0%

13. I am willing to financially support Phase 1.

Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
15.7%	51.6%	26.1%	4.6%	2.0%

14. This fall is the right time to proceed with a fund raising campaign so that we can move forward with Phase 1.

Strongly Agree	Agree	Not Sure	Disagree	Strongly Disagree
26.3%	43.4%	24.3%	4.6%	1.3%

15. One question leaders must answer before I can financially commit to a campaign is

INTERVIEW THEMES – FIRST ROUND
March 7, 8, 9 and 10, 2011

Based on Epworth United Methodist Church's number of active giving units (152), Church Growth Services would typically interview approximately 15 households to test for congregational ownership. Church Growth Services decided, however, to interview additional households when it learned of the changing pastoral leadership. Indeed, Church Growth Services interviewed a total of 47 households on March 7, 8, 9 and 10. The average length of tenure for the interviewees was 24.6 years.

The interview questions and the expressed consistent themes are as follows...

1. **Did you attend one of the Input Forums?**

All but nine households indicated they attended one of the Input Forums.

2. **How familiar are you with the plan to renovate the church facility?**

All but two households indicated they were "fairly familiar" or "very familiar" with the project.

3. **What is your personal opinion of this project?**

Several themes were expressed by the households.

Congregational Acceptance

Most agree that the renovation and addition would certainly create a pleasant and needed change to the infrastructure and appearance of the building. The BFTF Team received high marks in the preparation and presentation of ideas which people seemed to readily accept. Further, many cited the need to upgrade, renovate and build in order to become more attractive to the community. Typical comments included...

"We are completely behind it. If we don't do this, we will continue to decline and eventually have to shut our doors."

"It's hard to not get excited about it. The research going into this is second to none."

"It's time to update. It will also help our visibility in the community."

Estimated Costs, Budget Concerns and the Need to Phase

While most are excited about the proposed renovations and expressed strong desire to have them, many of the households also expressed grave concern over the congregation's ability to fund the entire project. As one household stated, "If we can't raise thirty-six thousand dollars for a budget deficit, we can't raise two million dollars for a new building."

Thus, the dominant theme communicated to Church Growth Services was the acknowledgement that the entire project was no doubt needed for the future growth of the church but given various budget and leadership uncertainties, the project must be scaled back to include only that which protects the church's infrastructure. "Fix only what needs to be fixed" was the expressed interest of most households.

4. Do you think this is the right time to proceed with this project? Why or why not?

Church Growth Services detected strong division over the timing to proceed. Some were excited and eager to begin. Some were equally concerned with the many changes taking place at Epworth and what these changes might mean to the future of the church. Households continued to express grave concern over the congregation's ability to fund an aggressive project due to...

- A. The economy.
- B. The uncertainty of a new pastor and if he/she will be accepted. Most believe that the new pastor must have strong preaching and pastoral capabilities in order to reverse a declining membership trend.
- C. An aging congregation.
- D. The letter requesting additional pledges.

Church Growth Services does find sufficient support for a fall capital campaign that would fund an identifiable 'phase one' including primarily essential items.

5. Do you think the congregation will financially support a fund raising campaign for this project? Do you think they can financially support it?

- A. Most households told Church Growth Services that people will do their best to support a campaign to fund an 'essential' phase of urgently needed items.

- B. Most also expressed serious doubt that households can support anything beyond a campaign of approximately eight hundred thousand dollars.

6. **Can you think of anything that might hinder a 3-year giving campaign?**

Most households noted the following...

- A. The economy.
- B. The cost of the total project.
- C. The failure to scale back the project and not phase it.
- D. The fear of not knowing who the new pastor will be and his/her capabilities.
- E. The letter sent the previous week outlining the financial need and possible need to either cut staff or staff hours.
- F. The aging congregation.

7. **In your opinion, do the majority of people understand the need for this project or is there more work to be done?**

The general consensus was that most understand the need for the project.

8. **From what you know about your congregation, over and above regular giving, and over a 3-year period of time, what do you estimate could be the largest individual gift made to this campaign?**

Note to leaders: Church Growth Services asks this question because, in its 52 year history, the largest gift given by one individual/family can be multiplied by the number 10 and this equals what is given by everyone. In other words, without ever being asked, someone almost always gives a gift that is 10% of the total amount given in the campaign. Thus, it is helpful to know what the largest gift might be so that the goal can be accurately established.

Responses ranged from \$5,000 to \$200,000. Most agreed that the largest gift could be around \$100,000 over a period of three years.

9. **In your opinion, who is the best lay person to chair this giving campaign? (The qualifications are passion for God and this ministry, strong leader of people, respected by the congregation.)**

Church Growth Services heard many responses to this question with a few individuals emerging as prime candidates. Church Growth Services will supply leaders with this information when requested.

10. **On a scale of 1 to 5 (1=very low, 5=very high), how would you describe your enthusiasm for this project? (Note: households interpret "this project" as the total project as outlined by the BFTF)**

Responses ranged from 2.0 to 5.0. Spouses often expressed different values. The average for all responses was 3.89.

11. **On a scale of 1 to 5 (1=very low, 5=very high), how would you describe your willingness to financially support this campaign?**

Responses ranged from 1.0 to 5.0. Spouses often expressed different values. The average for all responses was 3.81.

12. **On a scale of 1 to 5 (1=very low, 5=very high), how would you describe your ability to financially support this campaign?**

Responses ranged from 1.0 to 5.0. Spouses often expressed different values. The average for all responses was 3.29.

13. **Considering all you have told me, should the church proceed with a 3-year giving campaign next spring for this project?**

There were times when spouses gave different responses. The interviewee (not household) responses were as follows...

- A. 31 interviewees said yes. Many of these noted the importance to scale back and phase the project.
- B. 8 interviewees said no due to the reasons cited above.
- C. 4 households were not sure.

14. Do you have additional thoughts or advice about the proposed project or financial campaign?

The comments were varied. Statements included...

- A. "They have not addressed the issue of restrooms."
- B. "Sell the property."
- C. "Nothing in this plan helps the youth."
- D. "Tell us how we can do this. Give us the funding plan."
- E. "Prioritize the phases."
- F. "If we have to layoff staff this will hurt."
- G. "The answers from the Input Forum were not answered well."

COMMENTS – CONCLUSIONS – RECOMMENDATIONS

Based on the above Church Growth Services offers the following conclusions...

- 1. The congregation does not believe it can conduct a capital campaign that exceeds approximately \$800,000.
- 2. Most believe the total project is too aggressive given the budget and leadership uncertainties.
- 3. The total project is not considered to be of absolute necessity, although many would like to see the total project occur over a period of time.
- 4. People seem willing to give to a campaign that is maintenance-oriented.
- 5. People are willing to consider a capital campaign this fall for essential items.

Based on the above Church Growth Services offers the following recommendations...

- 1. BFTF should be asked to develop a 'master' capital plan that spans a period of time.
- 2. The first phase of this capital plan should only include that which is essential for the church's infrastructure.
- 3. BFTF should teach this first phase at a new Input Forum. Church Growth Services is willing to be present and facilitate the small group discussion.

4. Church Growth Services is willing to conduct new interviews but based on a smaller number of households.
5. Church Growth Services will then develop a congregational survey for a Sunday morning. The full pre-campaign report will follow approximately two weeks after receipt of the survey results.
6. In order for an early fall campaign to be implemented, it will be necessary for the above to be completed by the end of June.

INTERVIEW THEMES – SECOND ROUND
June 6 and 7, 2011

The first round of interviews revealed that church members were reluctant to fund the total project as presented by the BFTF Committee. Therefore, the committee revised the project and presented it to the congregation on Sunday, June 5. This second round of interviews was conducted on June 6 and 7, 2011 among 15 households.

1. **Did you attend the Sunday, June 5 informational meeting outlining the revised project?**

All but three households indicated they attended the meeting.

2. **How familiar are you with the revised plan?**

All but one household indicated they were "fairly familiar" or "very familiar" with the project.

3. **What is your personal opinion of this project?**

A majority of the households expressed acceptance for the revised project. Perhaps the most representative statement, expressed by one household, noted that "The repairs must be done. Even the renovation must be started."

One household was dismayed that a capital campaign would even be considered this fall since "This campaign will be the fourth request for money this year. There was a request for the 2011 operating budget in 2010. There was not enough money pledged for 2011 so they sent out a letter in the spring asking for more money. Then there was a letter asking people to give to the Dover parsonage. A possible campaign for this fall? This is too much."

Finally, there was one household who made a good point when they stated "There needs to be more information on the \$320K maintenance items."

4. **In your opinion, is this the right time to proceed with this project?**

Twelve households indicated that this fall would be an acceptable time. Two households would like to wait. One household was uncertain.

5. **On a scale of 1 to 5 (1=very low, 5=very high), how would you describe your enthusiasm for this project? (Note: households interpret "this project" as the newly revised project as recently outlined by the BFTF)**

Responses ranged from 3.0 to 5.0. Spouses often expressed different values. The average for all responses was 3.87 which was essentially the same as in the first round of interviews.

6. **On a scale of 1 to 5 (1=very low, 5=very high), how would you describe your willingness to financially support this campaign?**

Responses ranged from 2.0 (based on the possibility of leaving the church) to 5.0. Spouses often expressed different values. The average for all responses was 4.08 which was somewhat higher than the initial set of interviews.

7. **On a scale of 1 to 5 (1=very low, 5=very high), how would you describe your ability to financially support this campaign?**

Responses ranged from 1.5 to 5.0. Spouses often expressed different values. The average for all responses was 3.63 which was only slightly higher than the first interviews.

8. **Considering all you have told me, should the church proceed with a 3-year giving campaign next spring for this project?**

The responses were as follows...

- A. 12 households said yes.
- B. 2 households said "Wait until 2012."
- C. 1 household was divided.

9. **Do you have additional thoughts or advice about the proposed project or financial campaign?**

The comments were varied. Statements included...

- A. "We need to stop coming to the congregation for these other fundraising pleas."
- B. "I'm still not certain we will have enough Sunday School space."
- C. "Itemize the maintenance items."

[Data/Findings](#)

Number of Surveys Completed

All Respondents 152

Average Number of Persons in Household 2.2

Average Attendance 227 in June 2010

Number of Active Giving Units

Giving Units Per Church Leader 152

Church Growth Services Estimate Via Attendance 113

Top Three Tenure Groups

20+ Years 35.5%

11-20 Years 27.0%

4-7 Years 15.1%

Top Three Age Groups

Ages 55-64 30.7%

Ages 75-84 19.6%

Ages 85+ 11.8%

Average Household Income from the Survey \$73,091

Average Household Income from U.S. Census Bureau by Zip Code \$91,913

Church Cumulative Household Income

(152 household units x \$73,091) \$11,109,832

Tithe Potential \$1,110,983

Total 2010 Offering Income \$574,702

Church Rate of Giving

Percent of Tithe Potential Based on Giving to Church 51%

Rate of Giving Per Household to Church 5.1%

Church Growth Services Rate of Giving Norm 4.2%

Top Three Income Categories

\$35K-\$50K 24.4%

\$50K-\$75K 17.8%

\$75K-100K 15.6%

Estimated Source of Funds

Comparison Between Project Affordability And Pre-Campaign Assessment

Item	Project Affordability Revised 10-4-10	Pre-Campaign Assessment
1. Number of household units	152	152
2. Average household income	\$91,913	\$73,091
3. Projected 2010 offering income	\$468,105	
4. Actual 2010 offering income		\$574,702
5. Cumulative household income	\$13,970,776	\$11,109,832
6. Estimated giving as a percent of household income	3.3%	5.1%
7. Projected 3-year capital campaign goal	\$838,000-\$1,676,000	\$670,000 - \$1,340,000
8. Projected maximum long term debt	\$1,200,000	\$784,000
9. Total resources available for the new project	\$2,038,000 - \$2,876,000	\$1,454,000 - \$2,124,000

Footnotes

- Number of Active Household Units** - This is one of the key components of estimating your current and future giving potential. The operative word is "active." Active household units are more of a function of your church's average worship attendance than simply family units on a membership role. Accordingly, Church Growth Services uses formula from its historical database to define an estimate of the church's active household units.
- Average Household Income** – This is the second important component in calculating your church's current and future giving potential. To arrive at the earlier Project Affordability figure, your average household income was taken from the 2000 U.S. Census Survey and statistically updated to reflect 2010 income. It included taking the weighted average of the 23 zip codes reflected in the church's attendance records. The Pre-Campaign statistic was validated via the anonymous survey of your congregation.
- Projected 2010 Offering Income** – This represents the projected annual offerings income as provided to Church Growth Services in October 2011. See footnote number four.

4. **Actual 2010 Offering Income** – This represents the annual offerings income for the most recent full fiscal year as reported to Church Growth Services in the information provided to us. It should represent giving to all various funds of the church, but exclude one-time or non-recurring items such as large memorial gifts/bequests and non-offering sources of income such as borrowings, sale of assets, interest/rent, etc. It is a key component in helping to calculate your congregation's current annual giving as a percentage of their household income (see #5 below).
5. **Cumulative Household Income** – This is a calculated statistic obtained by multiplying the average household income (#2) by the number of active household units (#1). As such, you might think of it as the collective "earning power" of your congregation.
6. **Estimated Giving as a Percent of Household Income** – This is also a calculated statistic obtained by dividing your current offerings income (#3) by your cumulative household income (#4). This represents the average percentage of your individual families' annual income that they are giving to your church. Your statistic of 5.1% is above the Church Growth Services norm of 4.2%, which has been established through a detailed survey of over 100 churches. The current giving level of the existing constituents is an important determinant in estimating your church's capital campaign potential (see #6 below).
7. **Projected Three-Year Capital Campaign Goals** – Your three-year estimated capital campaign goal is a function of many of the assumptions made above as well as our 52 years of experience. Calculating your campaign goals is both art and science. It reflects the statistics and assumptions mentioned above. It also incorporates subjective judgment on related issues such as denominational variations, tenure of the senior pastor, etc.
8. **Projected Maximum Long-Term Debt** – Although many "multipliers" abound regarding safe levels of indebtedness for churches, we tend to focus on what will be your church's inherent ability to repay the debt. Our experience suggests that anywhere from 50-70% of the commitments made in an initial capital campaign can be continued in subsequent campaigns. Therefore, the "safe" long-term debt ability of your congregation is really a function of these factors. Once this calculation has been made, it is compared to industry "multipliers" to ensure that it is within those boundaries. However, in the final analysis, long-term debt ability is primarily a function of your church's increased giving capacity through a capital stewardship campaign.
9. **Total Resources Available for New Project** – Calculation of this important number is relatively straight forward arithmetic: It represents the sum of (your current cash on hand) + (your estimated 3-year campaign goal) + (maximum long-term debt) + (sale of assets) – (existing indebtedness). The figure for total project costs is all encompassing, i.e. it must include new construction/renovation, site development, property purchase, furnishings/equipment, professional fees, contingency, and interest expense during construction.

STEWARDSHIP CAMPAIGN POTENTIAL

CUMULATIVE HOUSEHOLD INCOME: \$11,109,832
(BASED ON 152 HOUSEHOLD UNITS @ \$73,091 PER YEAR)

% INCREASE OF INCOME BASE	ANNUAL INCREASE	3 YEAR INCREASE (ROUNDED)
2.0%	\$222,197	\$670,000
3.0%	\$333,295	\$1,000,000
4.0%	\$444,393	\$1,340,000

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- Current giving related to cumulative household income is estimated to be 5.1% (estimated current total giving of \$574,702).
 - The potential increase of stewardship giving is estimated to be in a range of 2.0% (typical) to 4.0% (potential).
 - Achieving these goals will generally require a participation ratio of approximately 60-80% of all church families and a lead (top) gift of 10% or more of the total goal.

**STEWARDSHIP OF LIFE
CHART OF GIFTS
3-YEAR GOAL - \$1,000,000**

# INDIVIDUAL HOUSEHOLDS	WEEKLY AMOUNT	ANNUAL AMOUNT	3-YEAR AMOUNT	TOTAL 3-YEAR
1			\$100,000	\$100,000
2			75,000	150,000
2			50,000	100,000
3			25,000	75,000
5			15,000	75,000
25	60	3,120	9,360	234,000
20	40	2,080	6,240	124,800
15	30	1,560	4,860	70,200
15	20	1,040	3,120	46,800
10	15	780	2,340	23,400
2	10	520	1,560	3,120
100				\$1,002,320

A three year financial commitment, called "3-Year Amount" above, can be broken down into a weekly, monthly or annual contribution amount.

Each "3-Year Amount" corresponds with the number of individual commitments we will need from households at Epworth to make our goal.

It is the hope that every household at Epworth UMC will find a "3-Year Amount" that fits their budget and resources.

You are welcome to commit to a 3-Year Amount that is not shown on this Chart of Gifts.

This Chart of Gifts shows that our Capital Campaign will succeed with equal sacrifice, not equal gifts.

Therefore, as you consider your gift to this stewardship campaign, please consider these three questions:

1. Have you surrendered everything to God including your job, your family and your treasures?
2. Will you ask God what His sacrificial gift is for you?
3. Will you obey what He reveals to you?

CONGREGATIONAL READINESS TO ACCOMPLISH A CAPITAL PROJECT

Congregational readiness is a critical concept in any capital campaign and is defined as *the extent to which a congregation has the ability and willingness to fund a specific project*. We believe that in order for a congregation to successfully undertake any capital campaign the following must be present:

1. A strong spiritual passion for the project because the congregation understands that it is the will of God. (Nehemiah 2:18)
2. A sense of spiritual urgency because the congregation understands that *"Night is coming, when no one can work."* (John 9:4)
3. A sense of stewardship revival because the congregation understands that a life redeemed by the Lord Jesus Christ calls for a fresh and new surrender of everything that God has made available to the believer. (Romans 12:1)

Supporting Data

Survey questions – 2, 5, 7, 8, 9, 10, 11, 13, 14, 15

Interview questions (First round) – 1, 2, 3, 4, 5, 6, 7, 10, 11, 12

Interview questions (Second round) – 1, 2, 3, 4, 5, 6, 7, 8, 9

Observations and Conclusions

1. Approximately 88% of the survey respondents are "satisfied with the level of communication they receive from leaders."

83.3% of the survey respondents either strongly agree or agree that they have "...confidence in our church leadership as they give direction to our ministries."

These statistics, along with others outlined in this study, are strong indicators that congregants trust leaders which are key issues when considering a major capital campaign to fund any building project.

2. Slightly more than one-half of the survey respondents indicated they attended the Informational Meeting on Sunday, June 5. Of those who were interviewed, almost everyone stated they are either 'familiar' or 'very familiar' with the revised project. This is critical since congregants must understand the reasoning behind the renovation/addition before they will consider giving sacrificially to it.

3. 66.9% of the survey respondents indicated that they are willing to financially support Phase 1. This meets Church Growth Services' benchmark of a 60% acceptance rate developed over 52 years of church consulting. Approximately 26.5% of the congregation is 'not sure' they will do so. This too meets a second benchmark of 30% or less for this category.

Recommendations

1. Continue to meet with people to hear and understand their opinions toward the project. Teach how the project will increase the effectiveness of ministry. Be careful when stating that the renovation will help draw new people to Epworth. This may or may not be true.
2. Develop different ways of communicating the above. One idea might be to create an "Information Center" open every Sunday morning beginning immediately. While the area might be boldly decorated with construction barricades and "flashing orange lights" the critical element is to staff the Information Center with knowledgeable volunteers who are trained to listen and answer basic questions rather than to sell and defend the plan.
3. Determine the level of debt, if any, to be incurred for the project. Communicate this level of debt, if any, to the congregation prior to the launch of the campaign.
4. Engage people in prayer. The following spiritual concerns might be considered...
 - A. That God would maintain a spirit of unity during the total process.
 - B. That God would continue to birth a spirit of generosity among all who call Epworth United Methodist Church their church.

CAMPAIGN VIABILITY

A stewardship campaign should not become an isolated event in the life of the church. Instead, stewardship campaigns should challenge people to become generous and intentional in their pursuit of Kingdom living so that others may personally know Jesus Christ.

Stewardship campaigns and 'giving decisions' can be made on the basis of the Great Commission. Believers must see the renovation/addition as a way to increase ministry effectiveness so that others may come to know Christ. Leaders must make certain that the *benefits* of this project are identified and that the congregation understands how the renovation and addition will benefit them as well as *those still to come*. The stewardship campaign can then become a useful teaching tool, demonstrating how God calls each one of us into a life of generosity. He desires that we pour ourselves out for Him. These life-changing challenges create a viable campaign...one that is capable of breathing discipleship into the life of every person.

Supporting Data

Survey questions – 5, 6, 7, 8, 9, 10, 11, 14, 15

Interview questions (First round) – 1, 2, 3, 4, 5, 7, 8, 9, 10, 11, 12, 13

Interview questions (Second round) – 1, 2, 3, 4, 5, 6, 7, 8

Observations and Conclusions

1. The rate of giving per household is 5.1%. Giving is usually indicative of the "acceptance of church leadership", i.e., money is usually the last to 'arrive' when a person comes to a church and usually money is the first to 'leave' when there are problems. Church Growth Services has determined, over many years, the typical rate of giving per household among growing churches is 4.2%. In 2005, giving from all churches, across all Protestant denominational lines was 2.6%...

Research from Empty Tomb, Inc. states "Giving has not kept up with income. Protestant denominations have published data on an ongoing basis throughout the century. In 1916, Protestants were giving 2.9% of their incomes to their churches. In 1933, the depth of the Great Depression, it was 3.2%. In 1955, just after affluence began spreading through our culture, it was still 3.2%. By 2005, when Americans were over 554% richer, after taxes and inflation, than in the Great Depression, Protestants were giving 2.6% of their incomes to their churches."

Clearly, Epworth enjoys a significant rate of giving per household. Further, this generosity, coupled with the strains of the economy and the fact that a significant portion of the congregation consists of aging households may reduce the amount of 'financial stretch' that would otherwise be possible under different circumstances.

Recommendations:

1. Assure the congregation that leaders will develop and communicate a conservative funding plan for the project. This funding plan should include...
 - A. Announcement of the campaign goal of \$1,000,000.
 - B. Acknowledgement of any anticipated borrowing and what that amount might be. Leaders should also communicate that the more the church receives in gifts the less the church will have to borrow (if borrowing occurs).
 - C. Announcement that the amount borrowed will be paid off before any new projects begin.
 - D. Communication via regular and thorough updates to the congregation concerning the progress of campaign receipts and building details.
2. Present a series of messages focusing on biblical stewardship.
3. Conduct multiple 'Tax Wise Giving' and 'Creative Giving' workshops throughout the campaign.

CAMPAIGN GOALS

Developing a realistic but challenging goal for a stewardship campaign is usually a function of evaluating several factors:

- A. The rate of giving per household
- B. Subjective feedback from congregants regarding the proposed project
- C. Congregants' acceptance of leadership and vision for the project
- D. Response to the survey question concerning giving to the campaign
- E. Average household income
- F. Current average attendance
- G. Congregational growth
- H. Age comparison percentages

Supporting Data

Survey questions – 3, 4, 5, 6, 12, 13, 15

Interview questions (First round) – 5, 6, 8, 10, 11, 12

Interview questions (Second round) – 5, 6, 7

Observations and Conclusions

1. 62% of the congregation is fifty-five years of age or older. This is normally a significant age group for a capital campaign since some of these folks might be able to consider gifts of appreciated assets such as stocks, property, etc. However, the average household income of the congregation was determined to be significantly less than the average household income as stated by the U.S. Census Bureau for the 23 zip codes supplied to Church Growth Services. This fact coupled with the high rate of giving per household and the tenuous economy suggests that leaders must be very careful when accepting any campaign goal over 2% of cumulative household income. Church Growth Services suggests that leaders and ministry workers thoroughly discuss and 'own' the agreed upon campaign dollar goal before it is announced to the congregation.
2. The survey indicates that the average household income is \$73,091. Church Growth Services learned that the number of active giving units is 152 as determined by a church leader. By multiplying the average household income by the number of giving units, Church Growth Services calculated '*cumulative household income*' to be \$11,109,832.

3. A typical campaign goal can range from an additional 2% to 4% of cumulative household income annually for a three-year time period. This guideline is the norm when the project, such as the one being considered, is the evident need and the singular focus of the campaign. Considering the relatively positive interview responses, the positive survey responses and the need for the renovation project, Church Growth Services is suggesting a somewhat aggressive campaign goal of 3.0% of cumulative household income. Leaders will want to confirm this goal prior to the launch of any capital campaign.
4. Utilizing 3.0% of cumulative household income as a guideline gives the church an estimated \$1,000,000 of increased funds over-and-above current giving for three years. Achieving this goal will require the participation of at least 66% of household units and one lead gift of 10% of the goal, or \$100,000.

Recommendations:

1. The renovation project will need strong champions including the new senior pastor, pastoral staff, lay leaders and ministry workers.
2. Leaders must define sacrificial giving through personal example. While it is never appropriate to reveal gift size, the congregation must still know that this project is vitally important to leaders and that they are willing to actually alter their financial lifestyles to see Phase 1 become reality. Key campaign leaders must therefore communicate the degree of sacrifice they are prayerfully considering.
3. A detailed Chart of Gifts must be created for campaign teaching and implementation. Church Growth Services has included a preliminary chart in this study.
4. Leaders must agree on the final campaign goal and express it through the Chart of Gifts.

Stretch goals are useful in community fund raising campaigns but they can be devastating for church campaigns. Failure to obtain a stretch goal often causes people to question God and whether or not His will was known by leaders. A pervasive sense of failure and discouragement comes upon the congregation even when the “base” goal is achieved but the “stretch” goal is just slightly undersubscribed. Therefore, it is absolutely critical that leaders carefully and prayerfully consider the goal for this campaign.

5. Provisions must be made for gifts in each of the following categories:
 - A. One-time gifts (immediate lump sums of cash).
 - B. Three-year regular increased stewardship commitments given weekly, monthly, quarterly or annually.
 - C. Non-cash gifts such as gifts of securities, real estate or other property.
 - D. In-kind gifts and gifts of labor should be solicited after the campaign commitment cards have been handed in.
6. Campaign leaders will want to consider asking key church leaders, loyal workers and spouses to pray about their sacrificial commitment before asking the congregation to pray about their gift. The call for leaders to pray about their gift can be critical to the success of a campaign and generates approximately 60% - 70% of the campaign goal. It is estimated that approximately 30% of the adult congregation might be invited to a gathering where people receive information as well as the challenge to spend time in prayer *before* the congregation is challenged to pray.
7. A project of this magnitude would not proceed without a capital campaign. Therefore, leaders and congregants must see a successful capital campaign as a critical step in the overall progress of this ministry. Failure to achieve the required capital campaign goal is not an option.
8. Stewardship campaign goals are always set in the context of a more comprehensive vision. Throughout the campaign, the focus needs to continually remain on "changed lives." New church facilities are only tools for the real work of ministry. If leaders will continue to articulate a clear vision as well as the ministry benefits of the project, Church Growth Services believes that the people will do everything they can to respond.

CAMPAIGN STRUCTURE AND PROCESS

Stewardship can be summarized in 5 principles from God's Word:

1. God created and owns everything.
2. The Christian is a steward (manager, not an owner) of life, time, talents and all resources.
3. Christian stewardship (or 'managership') requires personal commitment, discipline, and sacrifice.
4. God expects His sovereign ownership to be cheerfully acknowledged as we present our life's gifts to Him.
5. God will hold each Christian accountable for all that is entrusted to him/her.

A stewardship campaign must therefore become a spiritual journey. Stewardship is really not about fund raising. It's about relationship...our relationship to God. Our relationship to money defines the quality of our relationship to our Lord. Therefore, stewardship is really about our daily personal response to Christ's love. It demands our personal devotion and commitment. And it calls for a generous lifestyle.

Supporting Data

Survey question – 15

Interview questions (First round) – 3, 6, 7, 9, 13, 14

Interview questions (Second round) – 3, 8, 9

Observations and Conclusions

1. Many interviewees cited the economy and the fact they are on a 'fixed income' as the reason they may find it difficult to give.
2. Several households indicated that the project seems more 'doable' since the BFTF has created various phases.
3. Some households resent the number of times leaders ask for financial gifts.
4. Those who might have the gift of giving will require time to pray and seek counsel from their financial planners. Many people will take the same time to evaluate a gift of this magnitude as they would if they were making an investment in the secular world.

Recommendations

1. Church leaders and workers should be briefed on all aspects of the project and the campaign prior to the launch. Those with questions may need to spend additional time with the BFTF. Again, the intent is not to 'sell' but to listen to concerns.
2. The teaching and challenge of biblical stewardship should not be limited to adults only. All age groups should be touched by the campaign and they should also be given the opportunity and the encouragement to participate.
3. Multiple "Tax-Wise Giving Seminars" and "Creative Giving Seminars" (called "Finding Ways to Give in Tough Economic Times") should be conducted for the entire congregation. Providing relevant information regarding tax advantaged ways of making major gifts will be essential for those blessed with appreciated assets (stocks, property, etc.). On the other end of the income continuum, helping congregants discover ways to give is essential for those who daily feel financial pressure in their lives.
4. Campaign communication must be consistent and delivered through a variety of channels. This will include sermon messages, small group study and the distribution of printed materials. It might also include video, drama, the church's website, emails, and more.
5. The campaign should be delivered through the church's existing networks. This is especially true for small group presentations and spiritual emphasis. This presupposes that all leaders are well versed on the project and completely on board.
6. Most, if not all, of the campaign communication materials must be developed by volunteers with staff oversight.
7. It is essential that the campaign leadership team and the church council take the primary responsibility for the success of this campaign. The senior pastor, while brand new, can and should teach the biblical teachings of generous living. However, the campaign and the related revised project cannot be viewed as the pastor's agenda if this campaign is to be successful.
8. Congregants must be taught that pledges can be changed at any time during the three year giving period. Blank "revised" pledge cards must be included in the campaign booklet.

9. Church leaders must stop asking for financial gifts for other projects over the next three years.

SCHEDULE/TIMETABLE

Supporting Data

Survey question – 13, 14, 15

Interview questions (First round) – 3, 4, 5, 6, 13, 14

Interview questions (Second round) – 3, 4, 8, 9

Observations and Conclusions

1. Many of those who were interviewed expressed appreciation for the good work put forth by the BFTF.
2. Most of the interviewees in the second round felt that this fall is the appropriate time to launch the campaign.
3. Many are concerned about the economy and the fact that there are so many aging families and declining members in the congregation.

Recommendations

1. Slowly proceed with a capital campaign beginning immediately with preparation and training.
2. Develop a campaign timeline so that all might see 'the big picture' as well as the individual key events of the campaign. A campaign visual outlining these key events is included in this study.
3. Segment the campaign into three phases (there will be a certain amount of overlap among these phases):
 - A. A time of preparation for volunteer campaign leaders
 - B. Advance commitments (from staff, leaders, loyal workers and those with the gift of giving)
 - C. Congregational commitments

4. Provide ample time for those who might consider significant gifts to the project.
5. Determine that the campaign will become the focal point of the church calendar.
6. Celebrate the campaign results in December 2011.

SUMMARY

This Pre-Campaign Study presents an array of information to be analyzed. In the final analysis, this information becomes knowledge for leaders. And knowledge requires discernment that eventually generates the wisdom needed for effective decision making.

A study process which relies disproportionately on information and knowledge to the exclusion of discernment for wisdom is on a shaky foundation. To this end Church Growth Services encourages personal and corporate prayer time to be included as a major component of this study.

Church Growth Services believes that the church has the support base to implement a major capital campaign as proposed. There is always a cost and related risk in boldly moving forward. However, there is also a cost and risk in not moving ahead.

Your Pre-Campaign Study is a process, not a product. Church Growth Services was fortunate to serve the leaders of Epworth United Methodist Church throughout this process. Our prayer now is that the people of Epworth will continue to live incredibly generous lives so that many may be won to the Kingdom.

SURVEY COMMENTS

15. One question leaders must answer before I can financially commit to a campaign is_____.

- A membership growth campaign must be started.
- Bottom line.
- Can the population demographic in this area support long term debt, when we do not strongly work towards an ethnic diversity?
- Enough funds for changing church?
- Have we been spending money needed for building paying the consultant? It seems a lot of money went out that could have been used on the chiller and air conditioning.
- Have we tapped the resources within our church to do some of the work? (i.e. 8k to replace/install GFI's!) Hopefully the numbers we see here are very padded!
- How committed are we to membership growth and what is Epworth's plan to make it happen?
- How do we meet other expenses-payroll?
- How long will this entire project (not just Phase 1) take?
- How Phase 1 fits into the overall plan?
- How was Rev. Walker 'unfit' to lead this initiative?
- I need to be assured we are starting with the maintenance items needed most.
- I would prefer if we start out the campaign with a significant amount already raised from financial "leaders". Starting with 50% or 40% already raised will make it seem less daunting to the congregation members who are being solicited.
- In light of current economy, can this older congregation support this large debt? I know they can't answer, but it is a big concern for those living on retirement income. Can we turn around membership loss?
- Increase membership with help of new pastor before committing to any large investment. The new building would be great but not with declining membership.
- Is the congregation wholeheartedly in support?
- Is the design of the location of the community room and the school field room set in stone? (I don't like it.)
- Make sure we can accommodate walkers, canes, wheelchairs.
- Money
- Not being member, it is difficult to really be a good voice.
- Please install elevator and stop after Phase 1.
- Support of Rev. Hoopes; support group less than 55.
- The time commitment? Will missions continue during the project?
- We should work on increasing membership first.
- What are we doing and how much will it cost?
- What can we do to provide good reasons for many new people to want to join with Epworth? How do we stay relevant and attractive to newcomers and the unchurched?
- What happens if enough money is not raised?
- What happens if membership does not increase?
- What if I can't help as much as I would like?
- What is the giving church population?

- Where will offices and conference room be re-located after entrance renovation? Also I disagree with new entry-too expensive. Maintenance should be priority for Phase 1.
- Whether our new pastor will provide the spiritual leadership necessary for such an undertaking to be an opportunity for spiritual growth and increased unity of our congregation? Whether our new pastor will preach well enough for me to want to continue regular attendance at worship? The last few years of spiritual worship services have left me feeling distant and uncommitted from/to Epworth.
- Why are we building more when we can't take care of what we have and are not growing as a church?
- Why do we need this expansion?
- Why have an all church vote on the building when there was never any meeting regarding the pastor being asked to leave?
- Why not wait a year until we see how things play out with the new pastor?
- Will our membership grow?
- Will our membership grow? (I don't think we can answer this until the new pastor is fully "on board".
- Will our new pastor be invested spiritually in Epworth and will there be a prayer foundation that will continue to ask for God's guidance throughout this project?
- Will the circle drive work?
- Will there be enough people to actually help finance this project?
- Will this project be fulfilled with time frame and to the needs of this community?

EPWORTH UNITED METHODIST CHURCH, INDIANAPOLIS, INDIANA
CONGREGATIONAL INSIGHTS - JUNE 5, 2011

QUESTIONS:

1. What concerns do you have about this project?
2. What recommendations do you have to improve this proposal?
3. What questions do you have about this proposal?
4. What excites you the most about this project?
5. Is there anything else you want to share with the BFTF or Church Growth Services?

Question

Number COMMENTS

1	Financial feasibility. This aging congregation is very fiscally conservative. They are in the process of downsizing their lives and many also want to "downsize" their church. I worry that this natural direction of the elders plus the abysmal economy will make fundraising difficult.
1	All the funding issues. Increases in cost as we move along.
1	I don't think the exterior looks like a church.
1	None
1	I know we can do this!
1	What other items are being considered to bring people in and keeping them here once the new building attracts them?
1	Will we still be able to afford maintenance plus emergency?
1	Increase in prices as time goes on for each phase.
1	I think the plans are too extensive but I was pleased to hear that it will be done in phases so we can handle the costs.
1	I think the fellowship area seems way larger than needed.
1	Is the lobby sufficient?
1	Donor fatigue with 3 consecutive campaigns.
1	People being honest.
1	I will be honest.
1	Money - it seems like a lot!
1	Of course the financial, but hopefully people will step up and get behind this.
1	Buildings don't grow churches.
1	Funding - are there other sources like Lily Foundation to get money for the expansion?
1	It's about the money.
1	We need to carefully balance spending on building with having program/outreach to use it. We have to recognize that we may need to go to people instead of expecting them to come here.
1	Parking for future growth.
1	Construction underway for long period of time.
1	A spring 2012 ground breaking seems aggressive considering the architectural plans are conceptual and need to incorporate some feedback.
1	We can't pin our hopes on a building - revitalizing Epworth.
1	I still want to know why we find it acceptable for the front entry to be arranged so that the handicapped have to walk or wheel 3 times as far as an able-bodied person who can be dropped off at the steps. Right now the handicapped can be dropped off by the door and not have to navigate any steps.

Pre-Campaign Assessment
Epworth United Methodist Church, Indianapolis, Indiana

1	Our ability to begin the big addition for several years and pay off the debt load.
1	The raising of funds with the economy of today.
1	Cost is biggest concern.
1	Have cost estimates which cover 10 years taken into account. Probable increases in construction costs and financing as interest rates rise?
1	That we are having a 100 ton chiller which will use extra coal-produced electricity until the 3rd phase is completed. This extra cost of a 100 ton could go to reduce financial costs.
1	Donor fatigue - being asked for money for building over 7-9 years will make us tired of the whole thing and not give.
1	How can enthusiasm be sustained over the length of project?
1	How do you "protect" escrow account for maintenance needs?
1	Project goes from \$2.9M to \$4.M.
1	Can day-to-day budget items be sustained with additional project?
2	Do it as soon as possible. If we don't move ahead we are planning to go backward and die. An attractive edifice going up can generate excitement in the community and attract potential members/constituents.
2	I don't know. I think it looks like patchwork. Why can't the exterior all be of the same material?
2	If we can raise the money, go for it!
2	We need a new sign.
2	We need to make sure we can afford the maintenance items first. We should do the necessary maintenance before new builds.
2	Looks good.
2	Address key maintenance needs now.
2	Long-term finance campaign in 2012.
2	Kick-off membership growth first.
2	Good plan
2	Start growing the church first, bricks second.
2	Zone HVAC system to save on cost.
2	Daycare to bring in money.
2	More fundraisers.
2	Some updating of sanctuary to make it lighter - move altar forward should be prioritized. These would be relatively low costs.
2	With so many older members we need to have a high quality effort to get people to put Epworth in there will/estate planning.
2	Can we do other fundraisers besides Fish Fry?
2	Incorporate painting and other inexpensive tasks to add nice visual appeal to areas which will not be changing in Phase I.
2	The youth <u>NEED</u> their own space. If we want young families we have to be ready for kids of all ages.
2	Would prefer to see chancel area done first as phase one. Is this possible?
2	Replace same size A/C now. Add 2nd A/C when major expansion occurs. Let each unit act as co-backups via dampers.
2	Put in a 50 ton chiller.
2	Details seem to be being addressed.
2	Include some mission aspect so we don't feel this is a purely selfish endeavor.
2	Commit to professional style building management - this would include assessing our capital needs at least every 10 years and having adequate reserves.

Pre-Campaign Assessment
Epworth United Methodist Church, Indianapolis, Indiana

2	Determine project manager - do not manage "in-house."
2	Shorten the length of time from beginning to end - 9 years too long.
3	Some concern about where small groups might meet during Phase III building.
3	Management of building projects.
3	None
3	Is there a Plan B in case money doesn't come as quickly as planned?
3	What would happen if we don't get enough pledges (phase 2 & 3) after the project is started with building prep started and then wouldn't be completed?
3	Does the committee think this is a realistic set of goals?
3	What is being planned in case the prices increase substantially?
3	I'm concerned about this idea that we should attract new members who will help pay for this. We can't count on membership to grow. We don't know that it will.
3	I talked to fellow members - they have positive thoughts - amen!
3	Explain more about the grants available including the matching funds.
3	Interest rate? (fixed)
3	What research do we have that new building means new people?
3	Handicap parking.
3	Can you line item what maintenance items fall into each phase?
3	How much "hands on" can the community of our church offer?
3	How nice it will be if the phasing can be telescoped to occur faster!
3	Can we go past Phase One if we don't get new members?
3	What is projected construction time for each phase?
4	Having a beautiful, useful and safe facility to attract people and continue being God's hands and feet in the world.
4	Getting started and addressing our church upgrades and first phase BFTF.
4	The elevator
4	We will all feel renewed when this is completed.
4	The momentum that this is building - a feeling of hope and potential being realized. Really impressed with the plan for membership growth.
4	The possibility of getting more people into the church and having them be permanent members.
4	I think it will be great to have a drop-off area by entrance and/or a fellowship area near entrance (lobby).
4	I agree with the Phase I plan.
4	Good breaks into 3 phases - first phase should really make our impact.
4	To tell my friends what we are doing.
4	I like the energy and enthusiasm the planners are showing for the project.
4	The overall spirit of the congregation working together for the glory of God!
4	I like the idea about changing and refreshing the outside first to let people know there are exciting things happening at Epworth.
4	The circular driveway will be a good change.
4	Redesign (curb appeal).
4	Good idea to start from the front. Circle drive will be a great asset.
4	Phasing is more realistic.
4	Updated appearance may help with membership growth - more vital, attractive image.
4	Fellowship hall and growth.
4	Improving outside looks of the church.

Pre-Campaign Assessment
Epworth United Methodist Church, Indianapolis, Indiana

4	Maintenance escrow great idea.
4	Phases look good - entrance needs an update!
4	New building projects, changes to the church - haven't seen change in nearly 20 years of being at church.
4	Phase I - lobby attracting visitors, visibility of construction from the street, new sign.
4	The hope for the future.
4	That you finally recognize that what you build must be maintained. Maintenance cost money and that cannot be ignored.
4	The growth of our church and the welcoming aspect of a growing, vital church.
4	Love the design - it provides updating and modernization needed to take us into the future.
4	The new building and the long-range plan.
4	The possibility of more contact with our community.
5	Thank you so very much for all the hard work in preparing these plans.
5	No
5	I want to commend BFTF for an excellent job in getting us to this point. Highly competent and professional.
5	I would like to see plans for attracting people to the congregation that don't involve major building plans or major money expenditures.
5	Thanks for all of your work to date!
5	Thank you for your thoughtful work.
5	I commend you for your approach to this project and for establishing escrow account for future maintenance.
5	Thanks for all of your hard work and dedication.
5	Phasing makes sense. Seems like we will need a plan to keep the energy going so folks don't get "bummed out" on the fundraising since it covers so many years.
5	I will be on the "questioning" telephone call on Tuesday.
5	Please add a bike rack and make the project as green and walker/biker friendly as possible.

**Input Forum Agenda
(Dates)**

(Note: couples will not sit together during the small group process.)

(2 minutes) Welcome and Purpose of MeetingRandy Siebert

(2 minutes) Opening PrayerRandy Siebert

(25 minutes) Meal and clean up (children are dismissed)

(35 minutes) Understanding the Master Site Plan and Phase 1BFTF & Architect
(DO NOT ASK FOR QUESTIONS)

1. Use PowerPoint and handouts
2. Teach the problems and barriers
3. Teach the solutions

(10 minutes) Pastor explains:

1. Why it is time to proceed with the project
2. How the campaign to raise the money would work

(2 minutes) Introduction of Feasibility Study Cabinet Dick Beall

(50 minutes) Small Groups – Getting Your Input Dick Beall

Based on today's information:
1. What questions, concerns and recommendations do you have about Phase 1?
2. In your opinion, what has been the most significant information revealed today?
3. What is your opinion of using debt for this project?
4. What else do you feel is important for leaders to consider as Phase 1 continues to unfold?
5. What one thing excites you the most about Phase 1?

(2 minutes) Where do we go from here? Dick Beall

- ❖ Continue to ask your questions
- ❖ Telephone Interviews – (dates)
- ❖ 15 minute congregation survey – (date)
- ❖ Church Growth Services returns the study on (date)

(1 minute) Closing prayer

_____ (over) _____

DO YOU HAVE MORE QUESTIONS?

Please write out your questions below and give them to



Personal Telephone Interviews – Interview Questions: March 2011

Thank you for participating in the telephone interview with Dick Beall from Church Growth Services. The questions you will be asked are listed below.

PLEASE NOTE: These questions are designed to determine the congregation's readiness to proceed with a capital campaign to fund your project. Here is a good definition of a capital campaign: "A church capital campaign is a 3 month process of education/teaching during which time the members and friends of your church are challenged to voluntarily make non-binding commitments to the Building Fund which may be given over a period of 3 years. No one will ever call on anyone to ask for a gift."

ALL RESPONSES ARE PRIVATE AND CONFIDENTIAL

1. Did you attend one of the Input Forums?
2. How familiar are you with the plan to renovate the church facility?
3. What is your personal opinion of this project?
4. Do you think this is the right time to proceed with this project? Why or why not?
5. Do you think the congregation will financially support a giving campaign to renovate the church facility? Do you think they can financially support it?
6. Can you think of anything that might hinder a 3-year giving campaign?
7. In your opinion, do the people you know (in your circle of influence) understand the need for this project or is there more work to be done?
8. You will probably not know the answer to this next question and so we are asking for your best guess. Your response helps us determine the possible dollar goal for your campaign. Church Growth Services has learned, over many years that the largest gift, given by an individual or single family, is almost always 10% of what the church actually receives in a campaign. Specific names are **not** requested...only your hunch as to what the largest gift could be. Here's the question...

From what you know about your congregation, over and above regular giving, and over a 3 year period of time, what do you estimate could be the largest individual gift made to this campaign?

9. In your opinion, who is the best lay person to chair a potential fund raising campaign? (The qualifications are: passion for God and this ministry, strong leader of people, respected by the congregation.)
10. On a scale of 1 to 5 (1=very low, 5=very high), how would you describe your enthusiasm for the project?

11. On a scale of 1 to 5 (1=very low, 5=very high), how would you describe your willingness to financially support this project?
12. On a scale of 1 to 5 (1=very low, 5=very high), how would you describe your ability to financially support this project?
13. Considering all you have told me, should the church proceed with a 3 year giving campaign this fall for this project?
14. Do you have any additional thoughts or advice about the proposed project or financial campaign?

Interview Questions
June 6 and 7, 2011

Thank you for participating in the telephone interview with Dick Beall from Church Growth Services. The questions you will be asked are listed below.

As a reminder, you are scheduled to be called on _____

ALL RESPONSES ARE PRIVATE AND CONFIDENTIAL

1. Did you attend the Sunday, June 5 informational meeting outlining the revised project?
2. How familiar are you with the revised project?
3. What is your opinion of this revised project?
4. In your opinion, is this the right time for the church to proceed with this project?
5. On a scale of 1 to 5 (1=very low, 5=very high), how would you describe your enthusiasm for this project?
6. On a scale of 1 to 5 (1=very low, 5=very high), how would you describe your willingness to financially support a campaign to fund this project?
7. On a scale of 1 to 5 (1=very low, 5=very high), how would you describe your ability to financially support this project?
8. Considering all you have told me, should the church proceed with a 3-year giving campaign this coming fall to fund this revised project?
9. Do you have any additional thoughts or advice about the proposed project or financial campaign?

Pre-Campaign Assessment
Epworth United Methodist Church, Indianapolis, Indiana

Confidential - Anonymous Survey
Epworth United Methodist Church

- Complete only if over 17 years old
- Do not complete if first time guest
- Service attended:
8:45 Service _____
The Eleven _____

1. Member: Yes No

 2. How long have you been attending this church? _____ years

 3. Number of persons in your household _____

 4. Circle your age group: 18-24 25-34 35-44 45-54 55-64 65-74 75-84 85+up

 5. Occupational Status:
 Full-time employed Part-time employed College Student
 Homemaker Retired Seeking employment

 6. My (our) estimated annual household income is: \$_____ (Only **one** response per household)

 7. I am satisfied with the level of communication I receive from church leaders on important church issues.
Strongly Agree ___ Agree ___ Not Sure ___ Disagree ___ Strongly Disagree ___

 8. I have confidence in our church leadership as they give direction to our ministries.
Strongly Agree ___ Agree ___ Not Sure ___ Disagree ___ Strongly Disagree ___

 9. I attended the most recent Informational Meeting on Sunday, June 5: Yes ___ No ___

 10. I have a clear understanding of the revised building project (Phase 1) as presented by church leaders.
Strongly Agree ___ Agree ___ Not Sure ___ Disagree ___ Strongly Disagree ___

 11. Phase 1, as outlined by our leaders, represents a wise investment of funds for the future of our church.
Strongly Agree ___ Agree ___ Not Sure ___ Disagree ___ Strongly Disagree ___

 12. If necessary, I am open to a reasonable amount of debt to help fund Phase 1.
Strongly Agree ___ Agree ___ Not Sure ___ Disagree ___ Strongly Disagree ___

 13. I am willing to financially support Phase 1.
Strongly Agree ___ Agree ___ Not Sure ___ Disagree ___ Strongly Disagree ___

 14. This fall is the right time to proceed with a fund raising campaign so that we can move forward with Phase 1.
Strongly Agree ___ Agree ___ Not Sure ___ Disagree ___ Strongly Disagree ___

 15. One question leaders must answer before I can financially commit to a campaign is:_____
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