

The Three Plans

Practical Structure for Successful Capital Campaigns

A Travel Free Learning Article

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Structure is critically important for successfully raising funds. Fundraising structure is contained in three plans which build one upon the other. Together, the three plans provide the rationale and motivation for a congregation to generously contribute to their God-given mission.

Mission is Plan One

We are in an age of mission. Program and denominational orientation are giving way to mission focus. A congregation understanding and acting upon its unique mission is essential for capital campaign success. The best funded nonprofits and congregations are those with a clear and compelling mission. What should be included in a congregation's mission?

Mission begins with identity. A congregation must know and embrace its identity. Who are the persons who make up a particular faith community? What are their demographic characteristics? How do they live out their faith commitments? Where are they located? What is their lifestyle? Which Christian principles and traditions are embraced? When and how did members come to faith? Identity is no longer provided solely by a denomination. Identity shows up in the members present and it contributes to their unique mission.

Mission is lived out in a direction. In what direction is the congregation headed? Does the congregation even know their direction? This can sometimes be seen in a multi-year strategic plan. However, it shows up most clearly in the strengths present in the congregation. If identity is unique, then strengths within the congregation are even more unique.

A congregation should focus its direction on what it does well, on where it has a high level of expertise. A congregation should resource its strengths to keep them at a high level of proficiency. The full-service congregation has always been a myth. Every congregation has ministries and programs it does well and others not as well. A strengths-based direction focuses the congregation on doing extremely well what they are equipped and gifted to do.

Mission is sustained by values. Every community holds together its members with the glue of values. Values are those rarely disputed principles and beliefs that enhance identity and energize direction. Values provide a cohesive force that keeps a congregation committed to its faith, its direction and to one another. A value, if it goes missing or is ignored, will confuse identity and create anxiety over direction. Values provide a base of agreement, trust and credibility within the congregation upon which to build successful funding strategies.

The Project is Plan Two

Most campaign projects are space-focused. They provide for new space, renovated space or debt-free space. Space is a critical tool for accomplishing mission in our society and culture. Other tools may be just as important, such as equipment, personnel, outreach marketing to prospective members, new church plants or missional projects in blighted communities. Effective campaign projects should have the following three elements.

The project should have integrity. A project's integrity is in how well the project will enable the congregation to carry out its mission. Since all campaigns are essentially about mission, the project

should deliver those tools necessary for mission effectiveness and expansion. The important principle is that churches have no needs. Churches have solutions. The campaign project, to have integrity, must provide the right tool(s) for effective delivery of those solutions.

The project must embrace excellence. In a campaign, a congregation will be challenged to contribute their best gifts. The project must appear to be worthy of their best efforts to give generously, significantly, even sacrificially. This does not mean the project should be necessarily expensive, but rather it should be much more than a band aid or a quick fix. The project should have vision, boldness, permanence and it should create energy and excitement.

A desirable project has a sense of urgency. Urgency means that many in the congregation wish the project had already been completed. They believe that it should have been funded yesterday because it is that important to mission. Also, to not move forward and raise funds for an urgent project means that the congregation's mission will slow and stall. Very often, urgency is a byproduct of a congregation-wide process to develop the project.

Many congregations do not expect to be in a capital campaign, yet every year they seek annual support from their members. The principles of the three plans apply here as well. Members contribute annually to sustain and expand *Mission* which consists of identity, direction and values. For a *Project*, substitute the *Annual Ministry Plan* (the budget, but don't use that word!). The annual ministries should have integrity with mission, should be done in an excellent fashion, and should have a sense of urgency.

The Campaign is Plan Three

While the campaign is important, it is the third and last of three plans necessary for fundraising success. When preparing for a campaign, ask questions that reveal how well the first two plans of mission and project have been developed. Any significant deficiency in either of the first two plans means that the congregation is not yet ready to campaign and additional work must be done before the campaign is launched.

A campaign begins with a case. The case statement is a written rationale for why the congregation is embarking on a capital (or missional) campaign for this particular project at this particular time. The content of the case includes the mission of the congregation (see above), an abbreviated church history, recent mission successes, an outline of the process that determined the project, a brief description of the project that focuses on benefits, not just features, and a call for support. The case should appeal to members' intellect, emotions and spirit. This statement becomes the message guide for all communication in the campaign.

A campaign requires leaders. A campaign is led by a committee or team of members with the senior minister and some staff. The campaign leaders must be known, proven, trusted, skilled, enthusiastic and willing to work harder, pray deeper and give more generously than other members. Campaign success is mainly a result of capable leadership. The campaign team is not a place to train leaders; rather it is the platform for leadership. Leadership in giving is essential. More and more campaigns are succeeding with larger and larger major gifts.

A campaign runs better with preparation. A campaign includes an initial assessment of readiness, leadership enlistment and training, a case for support, spiritual emphasis, an extensive volunteer organization, a timetable of events and activities, communication in various media, enlistment and training of volunteers, major gift solicitation, commitment event(s), acknowledgment of commitments, follow up strategies and new member commitments.

A successful annual emphasis for stewardship development requires the same elements as a capital campaign. The congregation will respond better to a compelling case, generous leadership and a planned sequence of events and activities leading to commitments.

The campaign plan, and the consultant who provides it, must fit with your staff, your leaders, your congregation and your mission. An experienced consultant will invest significantly in learning your identity, your strengths and the values you hold dearly. Your mission should be reflected in how the consultation is delivered during the campaign. Most importantly, your consultant should know these three plans for successfully funding your mission.

Important Things to Know

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