



February 9, 2011

To: Fr. Tom Momberg, Nancy Hennessey, all Vestry members, and Church leaders

RE: Readiness Assessment/Feasibility Study Final Report

Dear Friends and Leaders at All Saints' Episcopal Church,

James D. Klote & Associates, Inc. is pleased to submit to you the following results of the Readiness Assessment/Feasibility Study conducted January 9, 2011 to February 9, 2011.

The Study consisted of nineteen (19) Focus Group meetings and follow-up discussions regarding the church's challenges and possible solutions. Letters were mailed to all members in advance requesting their attendance and input at Focus Group meetings. Fr. Tom and numerous Church leaders graciously offered their time and talents to serve in various capacities assisting in this Study. Many attendees provided insights, comments and posed important questions during the meetings. Thanks to all the parishioners and friends who thoughtfully participated at the Focus Group meetings and contributed greatly with incisive dialogue, reflective responses, and the ranking of proposed projects listed in the questionnaire.

The purpose and intent of the assessment was to determine the readiness of the parish to support the proposed plans of the church leadership and possible capital campaign. Those who have leadership roles in the church and the proposed capital campaign placed key importance on generating broad-based consensus for the proposed plans and obtaining the views of the parishioners of All Saints' Episcopal Church with respect to those plans. Secondary objectives included identifying other members who would be willing to accept volunteer roles in the possible capital campaign and those who the members believe would be capable leaders for the campaign.

We are pleased to have been invited to assist in your mission of providing for the physical and spiritual needs of All Saints' Church. We sincerely hope that this study will enable you to prayerfully choose the best course of action to serve the mission and continued growth of your church.

This report represents our professional findings and recommendations.

Sincerely,

For James D. Klote & Associates, Inc.

Jeffrey B. Cluxton  
Campaign Director

# **All Saints' Episcopal Church**

## *Capital Campaign Readiness Assessment*

*January 9, 2011 – February 7, 2011*

### **Executive Summary**

Submitted by Jeff Cluxton & Jim Klote  
James D. Klote & Associates, Inc.

## **Executive Summary**

### **Purpose**

The purpose of the Readiness Assessment/Feasibility Study was to present to All Saints' parishioners the proposed plans to repair and renovate various areas of the church. The proposed plans have been identified by various church leaders whose goal was to gain the parishioners perspective with respect to those needs and the relative priorities of those needs, as well as to gauge the level of support for a potential ensuing Capital Campaign for funding the needs.

### **Readiness Assessment Process**

In response to the desire of All Saints' Episcopal Church to renew and renovate its physical facilities, as well as include a component of outreach and Christian Formation, James D. Klote & Associates, Inc. facilitated a series of 19 Focus Group Meetings. Focus meetings began on Sunday, January 16, 2011 with the final meeting conducted on Monday, February 7, 2011.

The study design called for a series of Focus Group Meetings to be conducted at times that would be most convenient to the parishioners of All Saints' Episcopal Church and with a clear desire to have as many participants from the parish as possible. All parishioners were publicly and personally invited to attend one of the nineteen scheduled Focus Group Meetings. The meetings were held at times convenient for those attending Sunday worship services as well as some daytime and evening sessions throughout the week. Invitations consisted of a formal letter from Fr. Tom Momberg to each family, meeting schedules printed in Sunday bulletins, e-blasts, newsletter, and announcements during worship services. Meeting dates and times were selected to provide the entire church the opportunity to participate and voice their opinions. In keeping with the primary goal of receiving objective input regarding the proposed plans, there was no solicitation of funds at any of the meetings.

### **Focus Group Meeting Presenters**

Parishioners of the parish and Jeff Cluxton of James D. Klote & Associates, Inc. unveiled preliminary plans for renovating existing church facilities, repairing drainage problems, repairing steeple, upgrading HVAC in both the Historic Church and Court Street Building, repairing the floor in the Historic Church, repairing organ, repairing Court Street Building (windows, doors, façade). Also presented at each Focus Group meeting were additional proposed projects such as contributing 10% of what is raised to outreach, creating a Christian Formation endowment fund, and debt reduction. At each Focus Meeting, presenters shared with attendees the

information regarding the proposed plans. The presenters conducted the meeting in a manner that provided sufficient information and in an appropriate manner to spark interaction among the participants. From that point on, the facilitators maintained the engagement of the participants and maintained the momentum. The PowerPoint presentation containing history and details of the proposed plan was used during the all Focus Group meetings. Consistency in the presentation was a priority.

Facilitators then elicited responses from meeting attendees to questions dealing with the proposed plan of All Saints', suggestions for changes to the proposal and potential participation in a Capital Campaign as contributors and volunteers. The attendees were asked to prioritize the projects under consideration from 1-11. This will help the church leadership get a clear sense of parishioners' priorities.

The following gave graciously of their time and talents to make information easily understandable and appealing to their fellow church parishioners.

Nancy Hennessey	Tom Litras
Rich Ramirez	Sara Gibson
Waymon Wright	Jonathan Gambill
Gary Snyder	Ron McCurdy
Alan Meierhoefer	Sarah Heald
Darlene Aulls	John Aulls
Pat Custer	Mark Gibson
John George	Gary Crump
Linda Procter	Fr. Tom Momberg

Jeff Cluxton of James D. Klote & Associates, recorded detailed information at each of the sessions. The information provided is crucial to a comprehensive assessment of the "sense" of the parish and is included in the Appendix of the complete report. Detailed information from the Focus Group Questionnaire responses is also available. By utilizing this information and other input received, we have sought to objectively appraise the responses in general. This inclusive approach enabled the consultant to determine patterns and sentiments that would affect the church's ability to conduct a successful Capital Campaign at this time.

### **Sense of Parish**

Focus group participants indicated a strong support for conducting a Capital Campaign in order to ensure the continued success and vitality of All Saints'. The level of participation in the Focus Group Meetings is evidence that the plans for making enhancements and repairs to the buildings and the possibility of a Capital Campaign were taken seriously by the parish. Their questions and comments reflect a strong interest in identified needs and a desire to understand the existing plans for meeting those needs. **183 parishioners (68% of average attendance)** comprising a diverse cross-section of the All Saints' parish attended Focus Group

Meetings. The participants represented both longer-term parishioners and relative newcomers. **156 (85% of attendees)** questionnaires were completed. **92 (59%)** respondents indicated they would support the campaign financially. **24 (15%)** simply requested more information before committing to financial support. Our experience is that most people, who “need more information”, do financially support a campaign. **23 (15%)** respondents stated they could not support a campaign financially. **17 (11%)** did not respond to this question.

**74 (47%)** attendees said they would volunteer their time. **32 (21%)** stated that they need more information before committing their time. **30 (19%)** people indicated they were unable to volunteer their time. **20 (13%)** parishioners did not respond to this question. **44** of All Saints’ parishioners were suggested as leaders of a Capital Campaign.

### **Prerequisites for Campaign Success**

The directors of James D. Klote & Associates, Inc. have provided counsel and direction to hundreds of campaigns for a wide variety of causes. This experience indicates successful campaigns are most often the result of the following factors:

- 1) Proper Timing** -- Campaigns require time and effort. The fewer distractions occurring during the campaign period the better the results will be. During a Capital Campaign, individuals must place a relatively high priority and remain focused on the tasks they have been given to help reach the goal within a specified time period.
- 2) Appealing Case** – The client must make a strong “case” or rationale for conducting the campaign at a particular time. The case must be clearly defined and well documented. It must be visionary and meet far-ranging, long-term needs. Furthermore, it must speak to the needs and opportunities perceived as being most important to the church.
- 3) Influential Leadership** -- There must be access to the top staff and lay leaders who are willing to provide their influence, time and resources to support a campaign. Ideally, a core of these individuals must remain heavily involved with campaign organization and implementation. There is no substitute for active leadership to ensure the success of a Capital Campaign. A true “team effort” must be evident, with parishioners drawing upon the support and skills of each other. Campaign leaders must be firm yet sensitive, demanding yet understanding. They must also respect the judgment of the campaign consultant and be willing to accept the consultant’s counsel in order to facilitate a successful campaign.
- 4) Constituency With Adequate Resources** -- There must be adequate financial potential within a sufficiently large constituency to meet the needs identified

for the campaign. In addition, experience has shown that the following pattern of gifts is sought to increase the chances for success:

Lead Gift	10-20% of Goal
Top 15% of Gifts	45-55% of Goal
Remaining Gifts	45-55% of Goal

This is not a magic or exact formula, but our experience with hundreds of successful campaigns confirms the value of seeking to establish a giving pattern of this nature.

### **Addressing the Prerequisites for Success**

#### **# 1 Proper Timing?**

Of the total questionnaire respondents, 106 attendees said they would volunteer their time or simply needed more information to do so if a Capital Campaign took place. 30 people indicated they were unable to volunteer their time. Most of these would likely participate in at least a specific role that met their individual preferences. These results point to an adequate number of dedicated, committed parishioners who are willing to give of their time, talents and influence. In light of this, it can be assumed there will be a sufficient number of volunteers to begin and sustain the campaign recruitment process. These statistics as a group are a very positive indication of commitment within the parishioners to the success of a financial campaign. Overall, in questionnaire responses and direct comments during focus meetings the consensus was that the needs identified for capital funding were appropriate and necessary.

#### **# 2 Appealing Case?**

The case for the proposed Capital Campaign has wide support within the parish. The level of that support varies within parishioner groupings with respect to the needs that were presented and those that were raised by the parishioners in the Focus Group meetings. An estimated breakdown of costs is attached in the Appendix of this Report.

#### **# 3 Influential Leadership?**

Many people have already shown their leadership and willingness to help support a Capital Campaign. Indeed, very strong, capable and influential parishioners of the church are engaged and are revealing a can-do spirit and firm commitment to the success of the proposed campaign. Further, 44 parishioners /groups were identified by questionnaire responses as being leaders who should be enlisted for leadership roles in the proposed campaign. Those already engaged in leadership roles are obviously on that list.

#### # 4 Adequate Resources?

Whether or not All Saints' Episcopal Church has the ability to reach the needs of \$2,800,000 is a question facing all of us. Given our experience, the church faces a "challenge". Therefore, there must be acts of *sacrificial generosity* by all the families and parishioners. Those families with above-average ability to give will be instrumental in setting the stage for reaching and perhaps surpassing any challenging campaign goal. The appeal must be met however with financial support from all parishioners of the church, friends and past parishioners of the church.

Campaigns traditionally follow a formula that is skewed toward obtaining "lead" gifts from those most blessed with the ability to give. All Saints' is not an exception to this pattern. It must be noted that this does not in the least detract from the shared importance of the vast majority who will provide less than "lead" gifts. The advantage of being able to test the goal during the early phase, or "Advance Gifts" Phase, of a campaign will help the Campaign Steering Committee in evaluating what James D. Klote & Associates believes to be a realistic fund-raising goal. In other words, the goal can be evaluated in light of the results of early solicitation.

It is significant to note that 92 respondents indicated they would support the campaign financially. 24 simply requested more information before committing to financial support. Our experience is that most people, who need more information, do financially support a campaign. 23 respondents stated they could not support a campaign financially. 17 did not respond to this question.

#### **Professional Recommendations**

The following recommendations are made by James D. Klote & Associates, Inc., to the Vestry of All Saints' Episcopal Church on February 9th, 2011.

1. Vote to move forward with a Capital Campaign (with an Annual Stewardship component included to improve annual giving) beginning February 14<sup>th</sup> and concluding April 24<sup>th</sup>, 2011.
2. The creation of a Campaign Steering Committee will take charge of the day-to-day campaign operations and decisions.
3. Comments, questions, suggestions and concerns voiced during the Study relating to priorities and campaign leadership should be reviewed and considered immediately.

## **Plan of Campaign**

### **Phase I      Preparatory and Advance Gifts Period**

- ❖ Enlist Campaign Steering Committee (A small group of outstanding leaders).
- ❖ Prepare campaign materials (view book, pledge cards, etc.).
- ❖ Seek above-average gifts on a limited, highly selective basis.
- ❖ Plan a Parish campaign kick-off dinner.
- ❖ Enlist and train Chairpersons and Team Members for Phase 2, the Public Gifts period.

### **Phase II      Public Gifts Period**

- ❖ Conduct Training and Card Selection Session(s) for Capital Campaign and Annual Stewardship component
- ❖ Campaign Kick-off Dinner
- ❖ Pattern Gift Committee begins visits immediately after the Campaign Dinner.
- ❖ Visit every family and provide an opportunity to participate.
- ❖ Conduct Public Gifts Report Meetings.
- ❖ Deliver inspirational sermons.
- ❖ Recruit Co-Chairs, Team Captains and visitors for the Public Gifts Teams Committee.
- ❖ Celebrate Victory Sunday.

## **Campaign Organization**

### **Campaign Steering Committee**

This Steering Committee is the KEY to a successful campaign. Its members are persons of influence within the church whose involvement in the Campaign inspires confidence that the effort will succeed. The Campaign Steering Committee sets policy and guides the course of the campaign. It consists of approximately 8 to 12 members, including Campaign Co-Chairs, chairs of the subordinate campaign committees, clergy, officers and at-large members. The Steering Committee guides the course of action during the campaign.

### **Campaign Chairperson(s)**

The Chairperson(s) will lead All Saints' Episcopal Church in a successful Capital Campaign.

### **Donor Review Committee**

The Donor Review Committee is comprised of six people who know the church family intimately. The task is extremely important and will set the stage for the entire campaign. The Campaign Consultant will meet with the members of the committee individually at the beginning of the campaign (other meetings are possible, but may not be required). Members are to remain anonymous.

### **Spiritual Emphasis Chairperson and Committee**

The Rector's role is that of initiation, inspiration and support of the campaign. He has the opportunity to challenge and stimulate the parish to understand and respond to the campaign. The Spiritual Emphasis Committee will assist in developing a spiritual base for all campaign activities. This may be done by means of Worship Service announcements, reports in the newsletter, support at various committee meetings, and the development of a campaign prayer and the selection of a scriptural reference. The Chair of the committee will select a small number of parishioners to assist in this important part of stewardship emphasis. The campaign prayer will be used in campaign meetings, the Campaign Kick-off Dinner, Worship Services, and in campaign brochures.

### **Publicity Chairperson and Committee**

The Publicity Chairperson will need to involve a number of persons with them in carrying out the duties of this committee. The committee members will work with the Campaign Chairs, Rector, and Campaign Director in preparing articles for the newsletter, bulletin inserts, and other promotional and recognition materials. The Chair and/or other member will work closely with the Campaign Director in developing an attractive brochure to be given to each member of All Saints'. They will also be responsible for preparing a progress display to keep parishioners informed and up-to-date on campaign results. They will also be involved with the Banquet Committee and Campaign Steering Committee in preparing materials for the dinner.

### **Treasurer**

The Treasurer is the individual who will carry out many of the duties regarding auditing and collection of pledges. The Treasurer will provide accurate reports of all pledges, payments and expenses during the campaign and at the conclusion of the campaign. He/she will be responsible for tracking pledge payments and providing statements.

### **Advance Gifts Chairperson and Committee**

The Advance Gifts Chairperson, along with several selected members plus members of the Campaign Steering Committee, will be responsible for contacting a relatively small number of individuals who could provide contributions in the neighborhood of 50% of the Campaign goal. Committee members should be persons of influence and affluence who will feel comfortable asking others of influence and affluence to make those leading gifts that will assure the success of the Campaign.

### **Leadership Solicitation**

All members of the Steering Committee, Clergy, Vestry, and Parish Ministries Council are to be personally visited by Steering Committee members and asked to make their pledge to the Campaign and recruit other parishioners to assist in making these visits. These gifts will be added to the Advance Gifts.

### **Kick-Off Event / Campaign Dinner Committee**

The Chairperson will enlist a committee to help with the following responsibilities. The core committee typically consists of three or four individuals and will typically be augmented with many others to assist with arrangements and the dinner itself. This committee will work closely with the Campaign Chairpersons and the Campaign Director, helping to coordinate the Campaign Dinner. The Campaign Steering Committee will plan the program for the Dinners.

### **Public Gift Committee**

The Chairpersons will enlist other top leaders capable of soliciting gifts from prospects in an appropriate level category of giving in order to meet the needs of the Capital Campaign.

## Summary of Readiness Assessment Data

### All Saints' Episcopal Church Frederick, Maryland

<u>Projects Under Consideration</u>	<u>Cost</u>
Drainage & Foundation	\$150,000
Handicap Access	\$150,000
Steeple	\$30,000
HVAC in the HC	\$300,000
HVAC in Court St. Bldg	\$150,000
Floor in HC	\$8,000
Organ	\$50,000
Court St. Bldg	\$40,000
Christian Formation Fund	\$250,000
Debt Reduction	\$750,000
Outreach	\$188,000
(Increase in estimates,campaign expenses, debt reduction goal)	<u>\$784,000</u>
<b>Total</b>	<b>\$2,850,000</b>

Based on the proposed plan, the Focus Group attendees ranked the following items in priority. Not every survey indicated a priority, but the ones that did showed the following as important.

- Drainage & Foundation = 85% ranked in top 3 / 0% in bottom 3
- Handicap Access = 20% ranked in top 3 / 25% in bottom 3
- Steeple = 32% ranked in top 3 / 11% in bottom 3
- HVAC in the HC = 59% ranked in top 3 / 4% in bottom 3
- HVAC in Court St. Bldg = 15% ranked in top 3 / 14% in bottom 3
- Floor in HC = 8% ranked in top 3 / 28% in bottom 3
- Organ = 29% ranked in top 3 / 6% in bottom 3
- Court St. Bldg = 10% ranked in top 3 / 20% in bottom 3
- Christian Formation Fund = 6% ranked in top 3 / 58% in bottom 3
- Debt Reduction = 25% ranked in top 3 / 34% in bottom 3
- Outreach = 9% ranked in top 3 / 61% in bottom 3

Note: Some attendees felt there was more than one priority based on the proposal.

## **Parishioners Recommended for Campaign Leadership Roles**

Sara Gibson (11)	Hunt Hendrickson (11)	Tom Litras(10)
John Aulls (9)	Mark Gibson (9)	Vestry (7)
Darlene Aulls (6)	Nancy Hennessey (6)	Rich Ramirez (5)
Pat Custer (4)	Dunbar Ashbury (4)	Donna Seniff (4)
Dan Jonson (3)	Dan Lajewski (3)	Alan Meierhoefer (2)
Ian McGreevy (2)	Peg McGreevy (2)	Rixey Hoult (2)
Bill Gibb (2)	Gary Crump(3)	Waymon Wright (2)
Sharon O'Rear	Denise Parker (2)	Parish Council (2)
John George	Ron McCurdy	Ellis Kitchen
Alec Gregg	George Delatush	Cris Rattey
Janet McCurd	Youth Group	Buildg & Grounds
William Lohr	JoAnna Lohr	Sarah Heald
Ted Gregory	Bill Gibb	Wil Rice
Scarlet Gibb	The priests	John D'Amore
Kate Costlow	Harry Lawrence	

**Note:** The number after each name indicates how many times the person (group) was suggested as a leader.

### **Comments Received for leadership:**

It seems as if the leaders are well selected

People who can understand the leadership role and have time and energy for it

I have no idea who is good at what

Some newer members.

I think you have already organized a group of strong leaders

I feel I don't know everyone well enough to make that kind of decision

Sara, Rich, and Tom Litras are doing a great job

Definitely members of Budget and Finance and treasurer; a vestry that takes a realistic stand on finances not just the "touchy, feely" stuff

Focus Group Meeting  
Schedule

<u>Date and Time</u>	<u>Location</u>	<u>Host/Historian</u>	<u>Presenter</u>
Sun. January 16 9:15 am	Parish Hall	Nancy Hennessey	Tom Litras
Sun. January 16 12:00 pm	Great Hall	Rich Ramirez	Sara Gibson
Tues. January 18 7:00 pm	<b>Canc due to weather</b>	Waymon Wright	Tom Litras
Wed. January 19 7:00 pm	Jr/Sr classroom	Alan Meierhoefer	Tom Litras
Thurs. January 20 7:30 pm	Jr/Sr classroom	Sarah Heald	Gary Crump
Sat. January 22 10:15 am	Jr/Sr classroom	Pat Custer	John Aulls
Sat. January 22 6:00 pm	Parish Hall	Sara Gibson	Jonathan Gambill
Sun. January 23 9:00 am	Historic Church	Gary Snyder	Sara Gibson
Sun. January 23 12:00 pm	Great Hall	Waymon Wright	Jonathan Gambill
Sun. January 23 1:15 pm	Great Hall	Waymon Wright	Jonathan Gambill
Mon. January 24 (TBD)	FF Room	Ron McCurdy	Rich Ramirez
Wed. January 26 10:00 am	<b>Canc due to weather***</b>	Pat Custer	Tom Litras
Wed. January 26 7:00 pm	<b>Canc due to weather***</b>	Sarah Heald	Mark Gibson
Sat. January 29 9:00 am	Parish Hall	Ron McCurdy	John Aulls
Sun. January 30 9:15 am	Jr/Sr classroom	Alan Meierhoefer	John George
Sun. January 30 12:00 pm	Great Hall	Gary Snyder	Gary Crump
Tues. February 1 10:00 am	Conf Room	Jeff Cluxton	Pat Custer
Wed. February 2 10:00 am	Jr/Sr classroom	Waymon Wright	Tom Litras
Wed. February 2 7:00 pm	Jr/Sr classroom	Sarah Heald	Mark Gibson
Sun. February 6 9:15 am	FF Room	Linda Procter	John George
Sun. February 6 12:00 pm	Great Hall	Gary Crump	Linda Procter
Mon. February 7 10:30 am	Parish Hall	Darlene Aulls	John Aulls

**Summary of Study Statistical Data**

<b>Focus Groups (19 Total)</b>		
<b>Measurement</b>	<b>Qty</b>	<b>Ratio</b>
Parish's Average Attendance	270	
Total Attendance at all Focus Group Meetings	183	68%
Number of Focus Meetings	19	
Number of Questionnaire Responses	156	85%
Persons Identified as potential Campaign Leaders	44	

Persons Willing to Support Campaign Financially		
Measurement	Qty	Ratio
▪ Yes (Of the 156 responses)	92	59%
▪ No	23	15%
▪ Need more information / Undecided	24	15%
▪ No response	17	11%
Total	156	100%
Persons Willing to Volunteer Time		
Measurement	Qty	Ratio
▪ Yes (Of the 156 responses)	74	47%
▪ No	30	19%
▪ Need more information / Undecided	32	21%
▪ No response	20	13%
Total	156	100%
(Full details of volunteers and how they will volunteer in Complete Report)		

### **Summary of Comments and Responses on Questionnaires**

1. In your opinion, what is the most important benefit to be gained as a result of implementing (fulfilling/ realizing) the proposed plan for All Saints'?

Repair, preserve, maintain church x23  
 Debt Reduction x16  
 Continue worship x5  
 Be good stewards x4  
 HVAC x4  
 Organ x3  
 Continue church mission x3

2. Have we overlooked anything during the planning process? If so, what would you suggest?

No x36  
 Debt x7  
 Focus Groups x6  
 Christian Formation x5  
 Youth x5  
 Outreach x4

Grants x3

3. To be successful, a capital campaign requires both financial and volunteer support. Would you consider supporting a capital campaign:

(See Table with Complete Details)

4. Volunteers with a wide range of skills and interests will be needed. What responsibilities might interest you? (Things such as communication, kick-off banquet, fundraising, campaign steering committee, etc.)

(See Table of Those Who Will Volunteer)

5. Who would you suggest for leadership roles to ensure the success of a capital campaign?

(See Table of Suggested Leaders)

6. My greatest hope for my church is –

Grow/Growth x27

Concern for church x21

Continue x17

Debt x8

Worship x8

Community x7

#### **Comments During Focus Group Meetings (by topic)**

Capital Campaign	31
Miscellaneous	30
Debt Reduction	13
Grants	12
Outreach	12
Christian Formation	10
HVAC	9
Projects	9
Moving Forward	9
Church (general)	9
Handicap Access	6
Expenses	6
Drainage	3
Organ	3
Heavy Timbers Study	3

**(Complete Detail of Comments and Questions Available in Full Report)**