



## PREPARING FOR A DIOCESAN CAPITAL CAMPAIGN

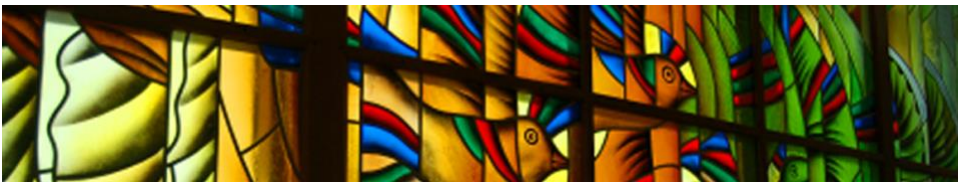
### Introduce Yourself!

In the chat log on the right, type your diocese and position or involvement.

Examples: Diocese of NY, canon to the ordinary

Diocese of Northern CA, trustee

Diocese of Atlanta, no diocesan position, just interested



## PREPARING FOR A DIOCESAN CAPITAL CAMPAIGN

Terri Mathes, Senior Program Director

(717) 599-0627; [tmathes@episcopalfoundation.org](mailto:tmathes@episcopalfoundation.org)

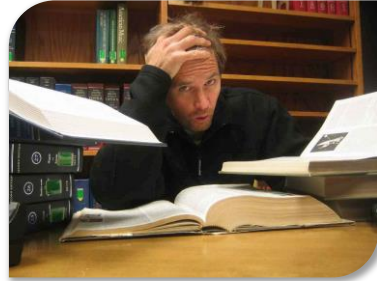
*November 5, 2014*



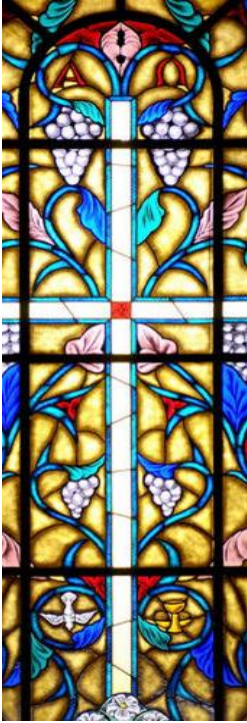


## What We'll Cover

- ECF's mission
- Challenges & advantages of a diocesan campaign
- Bringing people on board
- Staff implications
- Timeline



*Strengthens the leadership and financial capabilities of Episcopal congregations, dioceses and communities of faith to pursue their mission and ministry*



## Funding Your Ministries

- Special Appeals
- Annual Giving
- Capital Giving
- Planned Giving



## Phases of a Capital Campaign

### Discernment

- Visioning
- Prayer
- Involvement
- Planning
- Communication

### Study

- A Formal Feasibility Study
- Communicate the Results

### Ask

- The Solicitation Process
- Thanksgiving
- Implementation

## Diocesan Campaigns Are Different



### Challenges

- Limited understanding of the diocese's role
- Direct access to donors
- Perceived as secondary commitment



## Diocesan Campaigns Are Different

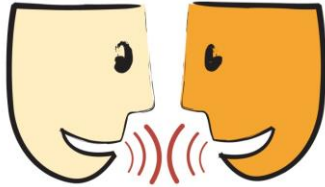


### Advantages

- Major gift opportunities
- Breadth of talent
- Potential for collaboration



## Clarifying Your Goals



### What will you raise money for?

- Propose initial vision
- The importance of feedback
- Creating urgency without anxiety



## Staying in touch

### Communication Basics

- Mailing addresses
- Email addresses
- E-newsletter
- Social media account
- Possibly video





## Bringing People on Board

### Key Constituencies

- Governing bodies
- Clergy
- Major donors
- Volunteers



## Bringing People on Board

### Governing bodies

- Get their input
- Educate them
- Ask to help in their congregation
- Do not confuse with nonprofit board





## Bringing People on Board

### Clergy

- Steward like major donors
- Collaborate with their fundraising
- Include in cultivation events



## Bringing People on Board

### Major donors

- Keep a list
- Prospects v. donors
- Track contacts & interest





## Bringing People on Board

### Volunteers

- Campaign co-chairs
- Parish captains
- Communications



## Implications for staff

### A Word About Staff

- They're already really busy
- Often their first campaign
- Rarely development professionals







## Implications for staff

### The Bishop

- Personifies the diocese
- Key to relationship building
- Make strategic use of existing schedule
- Allocate 20-30% of the calendar



## Implications for staff

### Rectors & Vicars

- Who will speak for the project?
- What support will you give them?
- Remember to think like a rector





## Implications for staff

### Data management

- Establishing database
- Moves management tracking
- Preparing for pledges & gifts



## Implications for staff

### Communications additions

- Paper newsletter
- Targeted e-newsletters
- Social media plans
- Video





## Timeline & Precautions

### Timelines

- Think in terms of years, not months
- Prepare to be flexible



## Timeline & Precautions

### Precautions

- Hazards of early gifts
- Why you need a feasibility study





## Words From the Wise

### What do you wish you'd known?

- More communication! You can't do enough.
- Invest in a good database management program.
- Budget for more direct mail than you think you'll need.
- Plan for more time to get parishes on board.
- Clear the bishop's calendar.
- Offer many naming opportunities to stimulate giving.
- Have a team of volunteers to help stretch staff time.



## Questions?

- Terri Mathes:  
[tmathes@episcopalfoundation.org](mailto:tmathes@episcopalfoundation.org)
- Louise Baietto:  
[lbaietto@episcopalfoundation.org](mailto:lbaietto@episcopalfoundation.org)
- Or call: (800) 697- 2858





## Upcoming Web Conferences

### **Volunteer Ministry**

*Nov. 13<sup>th</sup>, 7:00-8:00 pm EDT*

### **Hybrid Faith Formation**

*Dec. 9<sup>th</sup>, 7:00-8:00pm EDT*

Check EVENTS on our website for more webinars and workshops:

[www.episcopalfoundation.org](http://www.episcopalfoundation.org)