

# **Pre-Capital Campaign Implementation Study Report**

*For*

**St. James Lutheran Church**  
*Verona, Wisconsin*

**June 2015**





June 7, 2015

St. James Lutheran Church  
Pastors Kurt Billings and Peter Narum  
427 South Main Street  
Verona, Wisconsin 53593-1492

Dear Pastors Billings and Narum:

We extend our thanks to all at St. James Lutheran Church for the cooperation, support, and gracious hospitality extended to us throughout the Implementation Study. During the interview process, we experienced friendly and open communication regarding the proposed capital campaign and project plans.

Our thanks to the members of the project committee for coordinating the personal interviews and preparing the project case statement. A special thank you to Office Manager, Michelle Lichty, for her efforts of coordination of the Implementation interviews. Pastors, we appreciate the effort you made in welcoming and assisting us in this effort.

This final report is our distillation of the information, opinions, and ideas gathered through the Implementation Study process. It represents our evaluation and appraisal of major factors related to a potential capital/building campaign.

Now, important decisions must be made to continue the momentum essential to your congregation's vision. *The Harrison Group* welcomes the opportunity to provide continued assistance.

Blessings,

Jim Harrison  
*The Harrison Group*

Gene Orr  
*The Harrison Group*

# Planning and Implementation Study

## Table of Contents

Letter of Introduction and Appreciation.....	2
Table of Contents.....	3
Section One: Implementation Study Methodology.....	4
I. Introduction.....	4
II. Planning and Implementation Study.....	5
III. Elements of a Successful Campaign.....	6
Section Two: Interview Group Responses.....	7
I. Listing of Persons Interviewed.....	7
II. Questionnaire Data and Interpretation.....	8
Section Three Observations, Recommendations and Acknowledgements.....	18
I. Observations.....	18
II. Recommendations.....	19
III. Acknowledgements.....	21
IV. Gift Chart.....	21
V. Case Statement.....	22

# Section One - Feasibility Study Methodology

## INTRODUCTION

St. James Lutheran Church is considering a capital project to raise \$2.1 million or more towards a building expansion project of \$4.1 million.

The Case Statement for this Implementation Study expresses the belief God has called St. James Lutheran Church to be:

- A welcoming community for all to grow in faith and love.
- A congregation grateful for God's gift of salvation for us and for our church's history.
- A people of God reaching out to the community in love and service.
- A congregation dedicated to worship and to living out God's mission for the sake of the world.

The Case Statement declares:

**To meet this challenge, we look ahead with anticipation and excitement to expand and renovate our church, enhancing and promoting our community of faith.**

Therefore, the expansion and renovation plan proposes to:

- I. Provide
  - a. A large, open and inviting gathering space for conversation and strengthening relationships, and for welcoming members, visitors and the community.
  - b. Improved and expanded community service by increasing the Preschool enrollment and participation.
  - c. An expanded space for Sunday morning education and other programs for youth and young adults.
- II. Build
  - a. A flexible, accessible and spacious fellowship hall on the main floor for congregation and community meals, gatherings and events.
  - b. A new commercial kitchen on the main floor for fellowship events.
- III. Expand and Enhance
  - a. Youth activities to foster faith with a new space dedicated to learning and fellowship.
  - b. The monthly Community Meal.
  - c. Music and dedicated space for musicians.
- IV. Practice
  - a. Good stewardship of our building and property through maintenance, safety, accessibility, traffic flow, parking and water drainage.

The question that is now being explored is: *Is this a good time to take the next step and conduct a capital fund campaign to gain financial support to fund this project?* To this end, the Council authorized *The Harrison Group* to conduct an Implementation Study to explore the willingness of the congregation to financially support this building project.

The facts, findings, and recommendations within this report should provide the basis for leadership decisions with regard to conducting a capital fund campaign.

## PLANNING AND ASSESSMENT STUDY

As St. James Lutheran Church considers a capital fund campaign, several important questions need to be addressed:

- What conditions are essential for a successful campaign to be undertaken at St. James Lutheran Church?
- Realistically, how much money can be raised?
- Will the church community support a campaign that fulfills the goals of the proposed plans?
- When should the campaign begin and how long should it last?
- What volunteers are available to lead the capital campaign?

Determining the answers to these and other questions is the major purpose of the Implementation Study. Through the study, *The Harrison Group* has researched, analyzed, and evaluated fundamental factors present, or capable of development, which will influence a capital campaign.

A Case Statement for the Implementation Study was prepared (See page 22 of this report). It was mailed to every member household of St. James Lutheran Church. Members were invited to be personally and confidentially interviewed by *The Harrison Group*. Appointments were made with 78 persons representing 48 households of St. James Lutheran Church.

The criteria for those selected was

1. Members who are regular in attendance and active in at least one activity besides worship.
2. People representing a variety of ages, length of membership and life situations.
3. A strong sampling of people who are significant financial supporters of the church.
4. A strong sampling of former elected leaders of the church.
5. People who are well connected to others in the church.

*The Harrison Group* conducted these interviews May 14 – 17, 2015 at St. James Lutheran Church. A list of those interviewed is recorded on page 8 of this report.

## ELEMENTS OF A SUCCESSFUL CAMPAIGN

Certain elements must exist in connection with every successful fundraising campaign.

1. Recognition and acceptance of the “tentative needs” as expressed and an understanding of the benefits of the proposed plan for the mission of the church.
2. The case for widespread appeal.
3. Availability of strong financial leadership.
4. The capability of existing leadership to recruit additional support.
5. Past and current support levels for other church-wide capital campaigns.
6. The member’s awareness of the proposed plans.
7. The economic optimism of the church community.
8. Overall response to goal attainability.
9. Indicated interest in contributing to financially and projected levels of support for the proposed campaign.
10. Projected timing of the campaign.

These elements were carefully reviewed. The Observations, Recommendations and Acknowledgements Section address these elements of success as we consider the readiness of St. James Lutheran Church to proceed with a major capital fund campaign.

*NOTE: Editing has occurred in the comments to ensure the anonymity of the Implementation Study participants.*

## Section Two - The Interview Group Responses

### LISTING OF PERSONS INTERVIEWED

*Baldock, Jon and Dee*  
*Benson, Phyllis*  
*Bothun, Maynard and Sandy*  
*Bubolz, Susan*  
*Cain, Mark*  
*Canto, Desserie*  
*Ceniti, Rocco and Florence*  
*Conlin, Dave and Anne*  
*DeBaillie, Lee and Jen*  
*Dingle, Stan and Marlene*  
*Doyle, Tim and Sheri*  
*Eckmayer, Andrew and Kim*  
*Farmer, Dave and Julie*  
*Fauble, Phil*  
*Feller, Dave and Kim*  
*Fetherston, Rick and Judy*  
*Fitzgerald, Kari*  
*Freitag, Linda*  
*Geier, Ryan and Lindsay*  
*Gray, Jeff and Gail*  
*Moldenhauer, Mary and Mark Giesfeldt*  
*Hendrickson, Neil and Cindy*  
*Hinner, Mary*  
*Huset, Diann*  
*Jensen, Richard*  
*Kemnitz, Christine*  
*Kindschi, Ed and Rashelle*  
*Mattison, Jay and Mary*  
*Pederson, Dick and Kate*  
*Poast, Joe and Carla*  
*Polet, David*  
*Rash, Joanne*  
*Reed, Vince*  
*Roberts, Bruce and Barb*  
*Roum, Chuck and Marilyn*  
*Rudy, Lori*  
*Savage, Howard and Colleen*  
*Shellpfeffer, Jon and Vickie*  
*Simmet, Ludwig and Rebekah*  
*Smith, Mark and Laura*  
*Sommers, Jill*  
*Wainwright, Mark and Sue*  
*Walker, John and Mary*  
*Wendorff, Jay and Lisa*  
*Wolf, Doug and Karen*  
*Zimmer, Greg and Sue*  
*Zemicke, Jim and Sue Martin*

## QUESTIONNAIRE – ST. JAMES LUTHERAN CHURCH

### 1. HOW LONG HAVE YOU BEEN A MEMBER OF ST. JAMES LUTHERAN CHURCH? WHY DID YOU JOIN?

Membership Length:	
1 year or less	4
1-5 years	9
5-10 years	21
10 – 20 years	12
20+ years	32

#### FINDINGS

Participants in the Interview Group represent a cross section of members who have been involved in the ministry of St. James Lutheran Church for the purposes of this study.

#### REPRESENTATIVE COMMENTS

- *Members consistently talked about this as their faith home.*
- *They affirmed how they have been encouraged to be involved in all aspect of the church's ministry.*
- *The overwhelming number of responders said they felt welcomed and included in the life of the congregation. "I feel very at home here at St. James."*

### 2. WHAT WORSHIP SERVICE DO YOU TYPICALLY ATTEND AND WHY IS THIS SERVICE YOUR PREFERENCE?

Wednesday 7:00 - **5**   Saturday 5:00 - **9**   Sunday 8:30 - **34**   10:45 - **30**

#### FINDINGS

The participants had a variety of reasons for their preference of worship service. Most said that the service they preferred was because of their own personal schedule choice. Some like the 8:30 service because the choir performs at this service. Others preferred the 10:45 service because of a more contemporary feel. Those participating in the Wednesday or Saturday services appreciated the service and the convenience of the schedule.

#### REPRESENTATIVE COMMENTS

- *Sometimes I attend on Wednesday night if I'm busy on the weekend.*
- *I'm a member of the choir – usually sing at the 8:30. Once a month at the 10:45.*
- *Just use to going to the 8:30 service.*
- *In summer I like Wednesday night service.*
- *I go to 8:30 so I can stay and be part of the Communications Group.*
- *I like the traditional service, 8:30.*
- *10:45 service is my preference. It is a habit. Also, it is a quieter atmosphere for worship.*

### 3. DO YOU HAVE CHILDREN OR OTHER FAMILY MEMBERS WHO ARE/HAVE BEEN MEMBERS OF ST. JAMES?

#### FINDINGS

The majority of those interviewed did not have other family members here at St. James. Some had children at home who were active in the children and youth programs. In a few situations, some had adult children in the area who attend St. James Lutheran Church.



#### 4. TELL ME ABOUT YOUR EXPERIENCES SERVING IN THE LIFE OF THIS CONGREGATION AND THE MINISTRY AREAS THAT ARE MOST MEANINGFUL TO YOU AND YOUR FAMILY?

##### FINDINGS

The interview group expressed a high sense of appreciation for the ministry opportunities offered through St. James Lutheran Church. Worship, music, education, women's group, men's activities (golf), youth, pastoral care, pre-school, community meals and other outreach efforts to the community were identified as most important in this ministry. Interviewees are very active and highly involved in many ministries of the congregation. Many expressed how pleased they were with the variety of programs and ministries offered. Appreciation for the church staff in being open to trying new programs was affirmed.

##### REPRESENTATIVE COMMENTS

- *Involved with choir and other Sunday worship activities like counting the offering.*
- *Worship is most meaningful.*
- *Sunday School – teaching.*
- *Sunday conversation group.*
- *Youth group – my 9 year old loves it.*
- *Welcoming community – everyone is so genuine.*
- *Golf league.*
- *Women's groups – Circles.*
- *Love what the church provides for our young children.*
- *I like the small town feel of this congregation – warmth of the services.*
- *Music ministry.*

#### 5. DO YOU SUPPORT THE LEADERSHIP OF ST. JAMES LUTHERAN CHURCH? WHAT ARE THE MINISTRY STRENGTHS? WHAT AREAS COULD BE IMPROVED?

##### FINDINGS

This question highlights a very supportive response for the pastoral/lay leadership of the congregation from the interview group. Most interviewees said, "Yes, we support the leadership of St. James Lutheran Church."

##### REPRESENTATIVE COMMENTS

- *Great leadership from Pastors.*
- *Impressed with the time Council and others give to this ministry.*
- *Pastors are engaged – they are very helpful and accepting.*
- *Sermons relate to every day life.*
- *(Two mentioned) I don't feel like I know the Council.*
- *Yes. But I have some reservations on the process used by the leaders. Sometimes it seems like it is too political and key decisions are not made. We don't get things done.*
- *Ministry teams not strong in my opinion – Council maybe too much a rubber stamp.*
- *Yes. But we need a "Lead" pastor with an "Associate" pastor.*
- *Yes, I support Pastors and Council. We need a clear direct message from them on this project.*
- *Leadership is very loose and Pastors are laid back. We need decisions to be made.*
- *We appreciate the Pastors – pastoral care is a real strength – so is worship leadership.*
- *The strengths of our Pastors – outgoing and well-liked.*

## WHAT ARE THE MINISTRY STRENGTHS OF ST. JAMES LUTHERAN CHURCH?

### FINDINGS

The responses to this question continue to highlight the high level of satisfaction with the overall direction and vision for ministry at St. James Lutheran Church.

### REPRESENTATIVE COMMENTS

- *Music program is strength – excellent choir, director, and organist. Enjoy the Hand Bell Choir, too.*
- *Worship services and sermons.*
- *Outreach programs like the food pantry and community dinner.*
- *Youth ministry is strength – but always needs more effort.*
- *Preschool is a strength but also a potential new growth area.*
- *Offers a wide variety of programs for all ages.*
- *The Sanctuary is our strength – stained glass is so unique to the churches in our area.*
- *Sincere pastors and inspiring sermons.*
- *Circles.*
- *Welcoming community.*
- *Preschool.*

## WHAT MINISTRY AREAS, IF ANY, COULD BE IMPROVED?

### FINDINGS

Responses to this question emphasized reaching out for new members – particularly younger members. Also, the desire was expressed for improvement in the youth programming, especially for Middle School and High School.

### REPRESENTATIVE COMMENTS

- *Do more in youth ministry. This is a growth area.*
- *How can we attract more youth? I give the church high marks for focusing on youth, but I'm not sure how successful we have been.*
- *More programs for men.*
- *Competition with other congregations – how do we differentiate ourselves – find our niche?*
- *We need to get small group ministries going – more Bible Studies and more activities for teens.*
- *I felt not welcome at first. Cliques are sometimes an issue for newcomers.*
- *How can we help our children/youth/adults utilize our programs?*
- *Too many things going on! Want to do them all.*
- *Need to reach out to inactive members and to parents who leave their children off for Sunday School but do not attend themselves.*
- *Spiritual growth activities.*
- *Youth ministry after Confirmation. We need programs like mission trips to keep our youth involved and committed.*
- *Could do more in outreach.*
- *One comment went like this: "This is a good congregation, but not a vibrant congregation. We seem to be playing it safe. Need to seek out young people."*
- *Youth program is inadequate.*
- *Concern about pastoral leadership – who is in charge? With two pastors, no one is taking the lead. This feels dysfunctional.*
- *We need to focus on the broader community. More outreach. The preschool is key.*
- *Would like to see newer hymns used in worship. Also "different" music groups come in at times.*

## 6. HAVE YOU REVIEWED THE CASE STATEMENT THAT HAS BEEN DEVELOPED FOR THIS CAPITAL FUND CAMPAIGN? DO YOU BELIEVE THAT THE PROJECTS

## DESCRIBED IN THE CASE STATEMENT ADEQUATELY ADDRESS THE MOST PRESSING NEEDS AT ST. JAMES LUTHERAN CHURCH?

Reviewed Case:	
Yes	<b>76</b>
No	<b>2</b>
Don't know	<b>0</b>
Total Responses	

Addresses Needs:	
Yes	<b>65</b>
No	<b>6</b>
Don't know	<b>7</b>
Total Responses	

### FINDINGS

There is a consensus that the overall scope of project is good and needed. Some feel that it goes beyond our needs to "wants." Several felt the proposal is "ambitious."

### REPRESENTATIVE COMMENTS

- *Moving kitchen upstairs is great.*
- *The plan is a little zealous! But I certainly hope we can do it.*
- *I don't believe we should have two kitchens – will we be removing the one downstairs?*
- *One comment – Moving kitchen upstairs is not a good idea because of the noise level.*
- *Should not reduce size of the multipurpose room.*
- *(There were a few comments like this one) The school district should be addressing the preschool issue.*
- *Gym was not realistic. The needs of our congregation need to be studied well in order to create the best plan.*
- *How big is the Sunday School? Can we justify the space for it?*
- *One comment – If we go ahead with this, can we sustain the programs after the campaign? We currently borrow from "Dedicated Funds." Example: The \$300,000 estate to the church has been used for various items and repairs. This leads me to believe we cannot afford what we have now.*
- *I like the plans but don't feel we need it all.*
- *I'm supportive, but this is a big stretch. Can we phase in the plan?*
- *We need a facility for the preschool so that we can have an all day program. This is key for young families in our community.*

## 7. ARE THERE ANY ELEMENTS (MINISTRY OR FACILITY) THAT ARE MISSING FROM THE PLAN?

### FINDINGS

Most believed the building plan meets most of the needs. A few mentioned the need for better signage, youth staff space, coatroom, and technology.

### REPRESENTATIVE COMMENTS

- *I wanted to see the gymnasium built – but understand not enough land and too much money.*
- *Senior fellowship is lacking in this church.*

- Continue the theme of being an open church and offering a project that reflects that commitment.
- Gym eliminated – that’s good.
- Need more space for youth staff. I believe we need two staff persons in youth ministry. Kelley’s job description is too broad. One staff person to focus on the children and one on the older youth.
- We need to be sure the new space is multipurpose space.
- One comment: Elevator is okay but slow. Do something with the stairs.
- Need to address technology – screens in Sanctuary – keep up to date.
- Coatroom with in and out entrances.
- Electronic signage – our visibility to the community is poor. Need new signage. Banners out front.
- Air conditioning units on the roof! Who’s going to shovel the snow off!
- Don’t think so. Well organized plan.

**8. THE ESTIMATED OVERALL COST FOR THIS EXPANSION AND RENOVATION PROJECT IS \$4.1 MILLION. THE CHURCH COUNCIL AND CAPITAL CAMPAIGN TEAM ARE CONSIDERING A FINANCIAL GOAL FOR THIS CAPITAL CAMPAIGN OF \$2.1 MILLION. DO YOU AGREE THAT RAISING THIS AMOUNT OVER A THREE-YEAR PERIOD IS A REASONABLE AND REALISTIC GOAL FOR ST. JAMES LUTHERAN? IF SO, WHY? IF NOT, WHAT WOULD BE A CHALLENGING AND REALISTIC THREE-YEAR FINANCIAL GOAL IN YOUR OPINION?**

Yes	<b>33</b>
No	<b>19</b>
Not sure	<b>26</b>
Total Responses	<b>78</b>

**FINDINGS**

A majority either expressed doubt or did not believe the goal of \$2.1 million was attainable. Those who said it to be attainable usually qualified it with the statement “it will be a stretch for us.”

**REPRESENTATIVE COMMENTS**

- It is ambitious but possible if we get major and leadership gifts.
- It is a stretch but we can do it.
- This is a lot. We haven’t had information sessions. We need more time to discuss this plan.
- The driving force of the project is the preschool - plenty of secular places doing preschool.
- We will need two gifts totaling one million dollars if we have a chance on reaching this goal.
- In the plan, separate the needs from the wants.
- Past giving does not indicate we can do this.

**9. TYPICALLY, CHURCHES SUPPORT LARGE CAPITAL PROJECTS SUCH AS THIS ONE WITH A COMBINATION OF THREE-YEAR PLEDGES AND A CONSTRUCTION LOAN AND OR MORTGAGE. HOW DO YOU FEEL ABOUT BORROWING TO HELP FUND THE EXPANSION AND RENOVATION PROJECT AND SUBSEQUENT CAPITAL CAMPAIGNS TO MANAGE AND PAY DOWN THE MORTGAGE?**

**FINDINGS**

Most recognized that this is a reasonable way to go forth with such a project. Good understanding was shown by those interviewed that a series of 3-year capital (mortgage) campaigns would be needed to service and retire the mortgage on this project.

## REPRESENTATIVE COMMENTS

- *It is ambitious but logical way of proceeding with this project.*
- *What's happening to the present mortgage on the church? Should we not finish that responsibility before proceeding with this campaign?*
- *The goal is too ambitious. It represents 4 times annual giving by the members. The average member is not going to increase his/her giving by that amount.*
- *This is a typical approach – don't know if there is any other way – maybe someone donating the whole amount!*

## 10. WHAT DO YOU THINK ARE THE MOST IMPORTANT ACTIONS THE LEADERSHIP CAN TAKE TO ENCOURAGE AND MOTIVATE A BROAD BASE OF ST. JAMES LUTHERAN CHURCH MEMBERS TO COMMIT THEIR TIME, TALENT, AND FINANCIAL RESOURCES TO SUPPORT THIS PROJECT?

## FINDINGS

Responses to this question provide helpful input and direction for the leadership in making decisions on how to move forward. The general feeling was that the leadership was doing the right things but that the congregation needs more information and more of a sense that they are involved with the process. Communication is key. The interviewees want clear, concise, enthusiastic sharing of the plans. Several commented that they want the Pastors sharing their commitment to this and all the leadership demonstrating their commitment to going forward.

## REPRESENTATIVE COMMENTS

- *Bring people together and work for a good consensus – invite questions and help people understand why this project is important.*
- *Communicate the long-term vision and the benefits for community, future generations, and for us.*
- *Be upfront about everything – tell us what we need – have clear objectives.*
- *They have done everything right. Continue doing what they are doing. Surprised and pleased with the positive congregational vote.*
- *Spread the word among preschool parents.*
- *Communicate plans at the community meals.*
- *Show how the youth will benefit from this project.*
- *Address me by my first name – mailings only list the household name. Make me feel like I'm a part of the process.*
- *Show benefits of the project in terms of lives touched and changed.*
- *We've got to be talking about this all the time. Key people need to come forward and say with passion why they support this project.*
- *Get people involved in the campaign – payoff benefits.*
- *How have other congregations benefited from similar remodeling/expansion projects?*
- *Pastors need to take the lead.*
- *Pastors and key leaders will need to do home visits on those who have major gift potential.*
- *Keep us informed – no surprises.*
- *Celebrate the gifts of all.*
- *Get out there and talk to people.*
- *Recognize the time and talents offerings, too.*
- *Surprised the congregational surveys didn't give the committee a clearer picture of what is needed. Need to reflect the congregation's preferences. (This comment was reflective of one person).*

- *Keep us informed on the happenings and status of the plans and explain why certain steps and actions are happening during this process.*
- *The leaders need to communicate their enthusiasm for this project.*
- *We need a clear, simple message. And everyone aligned with that message.*
- *We need to tell stories of what happens here and how lives are changed.*
- *We need solid communication with a big picture vision.*
- *The Implementation Study is a good first step.*

**11. HOW READY ARE YOU TO PARTICIPATE IN RAISING THE NECESSARY FUNDS TO SUPPORT THE PROPOSED PROJECT WITH A CAPITAL FUND CAMPAIGN?**

<b>Self:</b>	
Ready	<b>68</b>
Not Ready	<b>6</b>
Not sure	<b>4</b>
<b>Total Respondents</b>	<b>78</b>

**12. DO YOU THINK THE CONGREGATION IS READY? WHY OR WHY NOT?**

<b>Congregation:</b>	
Ready	<b>43</b>
Not Ready	<b>3</b>
Not sure	<b>32</b>
<b>Total Respondents</b>	<b>78</b>

**FINDINGS**

87% are ready to proceed with a Capital Fund Campaign. Some of those who said they were not ready centered on personal concerns and not the project (i.e. not certain if they could make a financial commitment).

Concerning the perception of whether the congregation as a whole is ready, almost half of those interviewed felt they don't know the readiness of the congregation concerning moving forward with a campaign. Additional communication and forums may help increase the perception that the congregation is ready to conduct a Capital Fund Campaign. It is noteworthy to point out that 95% of those interviewed believed the congregation should proceed with the Capital Campaign as soon as possible (fall of 2015). See Question 19.

**REPRESENTATIVE COMMENTS**

- *Ready – this needs to be done.*
- *I'm ready – don't know if congregation as a whole is ready.*
- *Some are in a state of shock on the cost. Show how this can be achieved.*
- *I believe the congregation is enthusiastic about the project.*
- *I'm ready – cautious optimism that the congregation is ready.*
- *I will not be ready until I get more information on the plan (one response like this)*
- *I'm ready with some reservation about the scope of the project.*
- *We will not give until we have a "Lead" Pastor (one response like this).*

**13. FROM YOUR PERSPECTIVE, IS IT FEASIBLE THAT WE MIGHT RECEIVE MAJOR GIFTS IN THE RANGE OF \$50,000 OR MORE, OVER A THREE-YEAR PERIOD? CAN YOU SUGGEST INDIVIDUALS OR FAMILIES WHO MIGHT CONSIDER A LEADERSHIP GIFT OF \$50,000 OR MORE?**

Yes	<b>46</b>
No	
Not sure	<b>32</b>
<b>Total Respondents</b>	<b>78</b>

#### FINDINGS

Majority of those interviewed felt major gifts would be possible. Only a few suggested names of those who might consider such a gift. *The Harrison Group* will provide those names confidentially to the appropriate persons.

#### REPRESENTATIVE COMMENTS

- *Several shared the story of one donor giving \$100,000 for a new organ.*
- *Yes, we have a few who could give at this level. I would rather not say their names.*

**14. ALTHOUGH YOU ARE NOT MAKING A COMMITMENT AT THIS TIME, WILL YOU PRAYERFULLY CONSIDER WHETHER YOU ARE WILLING TO SUPPORT THE EXPANSION AND RENOVATION PROJECT WITH A FINANCIAL GIFT? (Below scoring represents households)**

Yes	<b>44</b>
No	<b>4</b>
Not sure	
<b>Total Households</b>	<b>48</b>

**15. IF SO, WOULD YOU CONSIDER A LEADERSHIP GIFT (\$10,000 OR MORE)? (Below scoring represents households)**

Yes	<b>20</b>
No	<b>28</b>
Not sure	<b>0</b>
<b>Total Households</b>	<b>48</b>

#### FINDINGS

92% of the households are ready to support the Capital Campaign with a gift/pledge. 42% of those households would consider a leadership gift of \$10,000 or more.

**16. IF SO, WHAT RANGE OF LEADERSHIP GIFT WOULD YOU CONSIDER? (The number in the column below represents households)**

Leadership gifts	
<b>\$100,000 or more</b>	<b>1</b>
<b>\$50,000 to \$100,000</b>	<b>1</b>
<b>\$25,000 to \$50,000</b>	<b>4</b>
<b>\$10,000 to \$25,000</b>	<b>14</b>

#### FINDINGS

The households numbered above would consider these gift levels. These are not pledged gifts. Such a decision will be made during the Capital Campaign.

**17. CAN YOU SUGGEST NAMES OF PEOPLE WHO YOU THINK WOULD DO A GOOD JOB LEADING THIS CAPITAL FUND CAMPAIGN – PEOPLE WHO ARE HIGHLY RESPECTED, HAVE EXCELLENT LEADERSHIP QUALITIES AND WHO “GET THINGS DONE”?**

**FINDINGS**

Many names were recommended as leaders for a building campaign. Most of those mentioned, however, are already involved with the leadership of the project. Interviewees were supportive of them and feel they were doing excellent work. Those names suggested that are not presently involved in the leadership will be supplied.

**18. WHAT IS YOUR WILLINGNESS TO CONSIDER A LEADERSHIP ROLE OR TO WORK IN SOME CAPACITY ON THE CAPITAL FUND APPEAL?**

Willing	<b>44</b>
Unwilling	<b>34</b>
Not sure	
<b>Total Respondents</b>	

**FINDINGS**

Significantly, a majority of those interviewed would be willing to assist in the Capital Campaign and a few of them would consider serving as leaders in the campaign.

There is strong support for this project among the interview group. When interviewees were asked specifically about their willingness to consider leading or being in a supportive role in the campaign, a majority said they would. Those that said they could not help in the actual campaign mostly gave reasons other than opposition to the effort. Again, continued interpretation on this project, a willingness by the leaders to listen to members' comments and concerns, and a desire by all to work for a growing consensus on the components of the project will bode well for a successful capital campaign.

The list of names of those willing to consider leading or helping in an upcoming capital campaign will be provided to the appropriate group.

**19. IS THE FALL OF 2015 A GOOD TIME IN THE LIFE OF ST. JAMES LUTHERAN CHURCH TO CONDUCT A CAPITAL FUND APPEAL? (PLANNING ACTIVITIES IN JULY-AUGUST - MAJOR AND LEADERSHIP GIFT PHASE IN SEPTEMBER - STEWARDSHIP AND 3-YEAR CAPITAL FUND CAMPAIGN IN OCTOBER-DECEMBER).**

Yes	<b>74</b>
No	<b>4</b>
Uncertain	
<b>Total Respondents</b>	<b>78</b>

**FINDINGS**

Respondents overall feel that this time period is a good time frame for a capital appeal.

**REPRESENTATIVE COMMENTS**

- Yes, as good as any.



- The sooner the better. Get people worked up for it!
- Don't slow down and lose momentum.
- Do it!
- We will lose credibility if we delay.

## **20. DO YOU HAVE ANY FURTHER COMMENTS THAT YOU WOULD LIKE TO MAKE AT THIS TIME PERTAINING TO THE CASE STATEMENT OR A CAPITAL FUND CAMPAIGN?**

### **FINDINGS**

The responses to this question continue to affirm the strong support for the overall project with many suggestions on the components of building plan. Concern exists about the affordability of this project.

### **REPRESENTATIVE COMMENTS**

- *I appreciate all the efforts to get this plan finalized.*
- *Look hard at the education center for the young children. Does this make sense for St. James? The school system has reserved \$10 million for further construction in the preschool area.*
- *Have you carefully analyzed the impact the new facility will have on the General Budget of the church?*
- *I hope we can do it.*
- *What do we do if we are not successful?*
- *Gone to Florida November – March. Who will invite me to give?*
- *Very supportive – this is very much needed.*
- *Concern about impact on church budget – pastors' salaries comes first.*
- *A very good Council – very capable leaders.*
- *Growth potential for Verona – 20,000 by 2020. We need to prepare for it – we need this project.*
- *Love to come here – love that my children love to come here.*
- *The Council went through an exercise on the strengths, weaknesses, opportunities, and threats that are before our congregation. We need to share our thoughts and listen for feedback from our members.*
- *I would help on the Campaign – communication and marketing are my fields.*
- *One comment like this: I think you should take another year before proceeding. We need to start over on the plan and bring the cost down.*
- *One comment went like this: The committee and council made a good start on this. But they haven't followed through with the congregation. They haven't brought us into the planning process.*
- *We are pleased the Council took the time to conduct the Implementation Study.*
- *One person made this observation: The pastors are about the same age. I worry they will retire at approximately the same time and we will be looking for two new pastors. Would it be better to have a pastor and an associate pastor?*
- *We have had a lack of communication and explanations for actions and decisions.*
- *Do we have a story and vision to draw in new members?*
- *Build into budget scholarships for the preschool.*

## Section Three - Observations, Recommendations and Acknowledgements

### OBSERVATIONS

The evaluation of study responses is a combination of statistical analysis, listening insight, and broad experience in preparing for and conducting church capital projects. Although such evaluations are not exact science, an experienced group outside the congregation, like *The Harrison Group*, is able to make an objective analysis that helps identify unique characteristics, strengths, barriers, and potential. *The Harrison Group* offers the following observations that, if addressed, may enhance the probability of success in a building appeal.

- MEMBERS BELIEVE ST. JAMES LUTHERAN CHURCH IS A HEALTHY AND GROWING CONGREGATION, AND THEY DESIRE TO FACILITATE ITS MINISTRY FOR YEARS TO COME. People enjoy being a part of this congregation and are highly confident in the church's pastoral and lay leadership. They take great pride in the congregation's ministry and want the church to continue its commitment to be a welcoming and serving community for the membership and the broader community. They do feel that the congregation is a very meaningful part of their lives.
- THERE IS STRONG SUPPORT FOR THE BUILDING PROJECT AND FOR PROCEEDING WITH A CAPITAL CAMPAIGN. HOWEVER, ADDITIONAL INFORMATION SESSIONS AND WORK ON PROVIDING A RATIONALE FOR THIS PROJECT WILL HELP TO SECURE A GROWING CONSENSUS FOR IT. Those expressing reservations on the project center on cost. There is significant doubt the congregation can raise \$2.1 million in one three-year campaign. However, most want to proceed with a capital campaign. The Harrison Group recommends a 3-year goal of \$1.5 million. The period of time between now and when the campaign takes place should be devoted to continued discussion, interpretation, and refinement of the project.
- A CLEAR, CONSISTENT, AND COMPELLING MESSAGE NEEDS TO BE COMMUNICATED ABOUT THE CAPITAL PROJECT TO SET THE STAGE FOR A CAPITAL CAMPAIGN IN THE FALL 2015. Excitement needs to build around the Building Plan Concept. Strong communication, involvement and an education phase will garnish additional support.
- THE PROPOSED CAPITAL CAMPAIGN IS LIKELY TO RAISE \$1.5 MILLION OVER A THREE-YEAR PERIOD. SIGNIFICANT MAJOR GIFTS ARE NEEDED TO REACH THIS GOAL. The present size of the congregation with the annual support that is given suggests a goal of \$1 million to \$1.5 million over three years to be reachable. The gift chart in the appendix of this report suggests the number of major and leadership gifts needed in order to secure a goal of \$1.5 million or more. The interviews revealed 20 households willing to consider leadership gifts ranging from

\$10,000 to \$50,000 or more over a three-year period. If such a goal is to be reached, many more gifts in this range will be needed.

- PASTORS, COUNCIL MEMBERS, AND OTHER KEY LEADERS VISION AND SUPPORT ARE KEY TO THIS CAMPAIGN. The leadership of this church has strong support according to this assessment. Their unqualified support and envisioning leadership will be key factors for success.
- THE NUMBER OF MEMBERS INITIALLY WILLING TO SUPPORT THIS CAMPAIGN WITH THEIR TIME, TALENTS, AND TREASURE IS STRIKINGLY HIGH. Even amidst questions, apprehensions, and unknowns, most respondents are ready and willing to support the campaign with a gift/pledge. A majority of those interviewed are also willing to assist in working on the capital campaign and maybe even in a leadership role.

## RECOMMENDATIONS

**CONTINUE TO HOLD INFORMATION SESSIONS ON THE BUILDING CONCEPT PLAN.** Consider addressing specific questions/concerns and encourage members to give their thoughtful suggestions. Emphasis should be on the fact that this is a building concept. Final plans approved by the congregation will occur only after the Building Expansion Fund Campaign.

**HELP MEMBERS TO REALIZE THAT WE DON'T HAVE TO AGREE WITH EVERY DETAIL OF THIS PLAN IN ORDER TO PROCEED WITH A CAPITAL CAMPAIGN.** The next key decision for St. James Lutheran Church is to decide that it is time to see how much can be raised in a three-year campaign. Only after such a campaign will the Council and congregation decide on the final plans of the project and its timetable.

**STRENGTHEN THE COMMUNICATION STRATEGY FOR KEEPING THE BUILDING PLAN CURRENT, COMPELLING AND URGENT WHILE THE CONGREGATION PREPARES FOR A CAPITAL CAMPAIGN.** With clearly defined objectives and good communications, St. James Lutheran Church should be ready to make the "Next Step" by proceeding with a capital campaign in the fall of 2015. The timeline for such an effort is as follows:

- ✓ June, July, and August – Planning, Preparation, and Leadership Recruitment.
- ✓ Late August – September – Major Gift Home Visits
- ✓ October – November – Conduct Stewardship and Building Towards God's Tomorrow Capital Campaign.

**COMMUNICATE IMPLEMENTATION STUDY AND PROCEED TO FINAL APPROVAL OF THE BUILDING EXPANSION FUND CAMPAIGN.** This needs to be done in June in order to proceed with the above timetable.

**FOSTERING LEADERSHIP AND MAJOR GIFTS FOR THE CAPITAL CAMPAIGN WILL BE KEY TO ITS SUCCESS.** *The Harrison Group* will work with the Campaign Leadership Team to interpret the need for all to prayerfully consider their gifts and pledges for this campaign. Key individuals, who have financial means, will need to

take the lead and prayerfully consider gift ranges of \$10,000 or more over a three-year period. All leaders at St. James Lutheran will be challenged to stretch in their giving so that others will be inspired to give joyfully and sacrificially.

**PROCEED WITH A CAPITAL CAMPAIGN IN AUGUST – NOVEMBER 2015 WITH A GOAL OF \$1,500,000 OR MORE OVER A THREE-YEAR PERIOD.** This will be a challenging goal. But it can be attained if all remain open to God’s Spirit and Will in this effort. A capital campaign does not expect “equal gifts” from the members. But it will call upon all to prayerfully consider “equal sacrifice.” In other words, if each of us can be spiritually open to God’s Spirit in this effort, we will be led to give liberally for this needed building project based on the means God has provided.

## ACKNOWLEDGEMENTS

*The Harrison Group* is pleased to present this study report and wishes to express, once again, appreciation to all who have responded so graciously, giving their time and effort to this study.

*The Harrison Group* presents these findings and recommendations as a vital first step in assisting St. James Lutheran Church to prepare for its future with optimal results.

Respectfully submitted,

Jim Harrison and Eugene Orr  
*The Harrison Group*

## Gift Chart for St. James Lutheran Church

The goal to raise \$1,500,000 or more for Capital Campaign is predicated on securing major and leadership gifts that will reach one-half to two-thirds of the campaign goal. All members and friends of St. James Lutheran will be asked to prayerfully consider what God is leading each to do for this building project.

### MAJOR GIFTS

1 Pledge of .....	\$150,000 or more
2 Pledges of.....	\$100,000 to \$149,999
3 Pledges of.....	\$75,000 to \$99,999
4 Pledges of.....	\$50,000 to 74,999
8 Pledges of .....	\$25,000 to 49,999
10 Pledges of .....	\$15,000 to 24,999
<b>Total Major Gifts</b>	<b>\$1,125,000 or more</b>

### LEADERSHIP GIFTS

15 Pledges of.....	\$10,000 to \$14,999
<b>Total Leadership Gifts</b>	<b>\$150,000 or more</b>

### WEEKLY GIFTS/PLEDGES

8 Pledges of \$60 a week	\$9360 per pledge	\$ 74,880
8 Pledges of \$50 a week	\$7800 per pledge	\$ 62,400
8 Pledges of \$40 a week	\$6240 per pledge	\$ 49,920
12 Pledges of \$30 a week	\$4680 per pledge	\$ 56,160
16 Pledges of \$20 a week	\$3120 per pledge	\$ 49,920
<b>Total Weekly Gifts</b>		<b>\$293,280 or more</b>

### OTHER GIFTS

Other Pledges and gifts.....	\$125,000 or more
------------------------------	-------------------

With the above Capital Campaign pledges/gifts, you would exceed the goal of \$1,500,000 for the three-year Capital Campaign!