

Strategic Planning Study – Executive Summary
June 2019

FINDINGS

Purpose and Process

- To test the feasibility of a proposed fundraising campaign, and to develop a preliminary plan, timetable, and the required tactics to achieve maximum philanthropic support.
- Discussions were conducted with 51 households across varying constituencies in the congregation.
- Study findings were compiled and analyzed based on CCS' 70+ years of fundraising experience, and recommendations were developed for St. Alban's leaders to determine the best course of action.

Perceptions of St. Alban's

- The vast majority of participants (86%) had a "very positive" or "positive" perception of St. Alban's.
- Top strengths cited: Community outreach (26), Leadership by clergy (26), Sense of community (22), and a Welcoming atmosphere (22).
- Cited challenges: Declining membership/attendance (22), Congregation trends older (14), Less young families joining (10), and Facilities need an upgrade (8).

Reactions to the Preliminary Background Statement

- Most of the personal discussion participants (74%) had a "very positive" or "positive" reaction to the Preliminary Background Statement with eighteen percent (18%) having a "mixed" reaction. Only two participants had a "negative" reaction, with another two having an "unsure" reaction.
- Those individuals who responded "negative" or "mixed" mostly sought additional details regarding the proposed project's timeline and costs. Those "unsure" cited lack of familiarity.

Feasibility, Timing, and Obstacles of the Proposed Campaign

- One-third (33%) of the participants said \$1,500,000 was a realistic fundraising goal, while a small number (6%) did not think the amount was realistic. More than half (61%) were "unsure" about the proposed goal.
- Nearly nine in ten (88%) participants said now is the right time to move forward with the campaign.
- The three (3) most often cited obstacles to campaign success included: Lack of plan details, Need for transparent communication, and the Impact to stewardship.

Suggested Leadership Candidates | Willingness to Participate

- Fifty-one (51) individuals were suggested for campaign leadership positions.
- 41% of the participants would consider serving as a volunteer leader.
- Just over half (51%) of the participants would consider serving on a campaign committee.
- Less than one-third (31%) of the participants would consider requesting gifts from others.
- Almost all (98%) of respondents said they would consider making a campaign gift.

Note: The data shown above reflects responses from the 51 personal strategic discussions

E-Survey Findings

- 76% of respondents had a “*very positive*” or “*positive*” reaction to the Background Statement.
- More than half (54%) of respondents believe now is the right time to conduct the campaign; 43% were “*unsure.*”
- Less than half (41%) of respondents indicated they would be willing to serve on a volunteer committee, and nearly all (88%) indicated they would financially support the campaign.

INITIAL RECOMMENDATIONS

1. Develop an impactful Case for Support.

- Convey information that describes the impact of a campaign on the church, the parishioners, and the community. The Case will need to explain in detail each project element, as well as its positive influence on the church's mission, programs, and ministries.
- Provide specifics (e.g. timeline, cost) supporting how and what the renovated facilities will accomplish.
- Articulate what could be accomplished with this infusion of philanthropic support.

2. Secure strong volunteer leaders to assist in campaign preparation and execution.

- Committed volunteers are essential to help engage, cultivate, and request support of potential donors.
- Recruit a Campaign Executive Committee to design/implement The CAMPAIGN FOR ST. ALBAN’S.

3. Determine the Campaign Goal and Benchmarks for success.

- Begin with a **preliminary**, working goal of \$1,100,000.
- The final goal will be informed by the number and amounts of highest-level gifts.
- Cultivate, request, and secure early gifts first to build momentum and credibility.
 - Utilize interim markers to drive momentum, raise sights, and ensure ultimate success;
 - As appropriate, request planned gifts, citing the opportunity to make long-term impact.

4. Develop a coordinated Campaign Plan to reach the final goal.

- Implement a coordinated campaign, to include the following:
 - Strong organization, implementation, and detailed plans for all case components;
 - A sequential approach – visiting the most engaged families first;
 - A specific campaign plan with interim leadership and financial markers;
 - Fully-oriented, empowered volunteer leaders; and
 - Professional planning and direction for the campaign through CCS Fundraising.

5. Allocate necessary resources to staff and manage the campaign.

- St. Alban’s clergy, staff, and volunteer leaders should devote significant time to the effort.
- The campaign should be professionally planned, staffed, and managed by experienced fundraising consultants.
- A campaign budget should assure donors’ gifts are stewarded and costs are below industry standards.