

## END OF SERVICE REPORT

*Prepared For*

**St. Paul's Church in the City of Albany**

## **Rebuild, Restore, Renew** **2019 Capital Campaign**



475 Riverside Drive, Suite 750, New York, NY 10115



September 9, 2019

The Rev. Nixon McMillan, Rector  
Mark Lowery, Chair  
St. Paul's Episcopal Church in the City of Albany

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Dear Friends:

It is a pleasure to present to you the *End of Service Report* of the **Rebuild, Restore, Renew** capital campaign for St. Paul's Episcopal Church in the City of Albany. The report marks the end of the solicitation phase of the capital campaign and the transition to ongoing services at the Episcopal Church Foundation.

The success of the **Rebuild, Restore Renew** campaign to date is a tribute to the outstanding dedication and prayerful support of many volunteers, friends, and parishioners. We especially commend to you some individuals whose work on the campaign was exemplary:

The Rev. McMillan, who shared *his* vision and gift of leadership in rallying the congregation and friends to support the campaign;

Mark Lowery, Campaign Chair, whose far-reaching concern for the church enabled him to devote many, many hours to this effort and who tirelessly shared his considerable leadership gifts through every phase of the campaign, and agreed to lead the Planned Giving effort;

Katherine Onufer, who brought together the material for the campaign brochure and shepherded it to a successful conclusion;

Sandra Feck, Gift Worker Coordinator, who recruited volunteers and oversaw a successful Advance Gift phase and led an enthusiastic Congregational Gift phase;

Judith Malionek, Spiritual Emphasis Chair, who continually reminded us all that we were about the Lord's work through the beautifully written campaign prayer;

Shelia Smith, Kick-Off Event Chair, who with a team of volunteers, enabled the congregation to celebrate the campaign in a meaningful and beautiful way;

Kelly Dalton, who kept the campaign database up to date;

Lisa Walker, who assisted with the outstanding and creative communications effort during the campaign;

The numerous volunteers who were involved in supporting the vital goals of the **Rebuild, Restore, Renew**; their mission and ministry has enhanced the church for generations to come because of their devotion and generosity;

Sandra Lowery, Campaign Coordinator, who provided outstanding administrative support;

and last, but by no means least, the church staff for all their assistance in making the campaign run smoothly.

A base goal of **\$197,000** with the challenge goal of an additional \$86,000 was set for the **Rebuild, Restore, Renew** campaign; as of the end of August the campaign has successfully raised **\$267,625** from **fifty-four** (54) gifts and pledges.

This report includes nine recommendations for actions to help ensure that pledge payments are made, the base of giving grows, the spirituality of the campaign lives on, and that the leadership of St. Paul's is aware of resources to assist in strategic decision-making into the future, particularly by utilizing **ECF What's Next. What's Next** is an assessment tool that provides some questions for conversations at a Vestry retreat, or any commission's planning meetings. It accompanies this report.

ECF will follow up in the months ahead to receive feedback on the campaign process and your progress.

Should any questions arise in the coming weeks or months, or if you need post-campaign service, we will be delighted to continue to provide whatever assistance is needed. It is an honor to walk along this journey with St. John's.

In Christ,

Jerry Keucher  
Consultant  
Episcopal Church Foundation

## ***Episcopal Church Foundation Recommendations for Post-Campaign Success***

### **1. ESTABLISH A POST-CAMPAIGN REVIEW COMMITTEE**

The committee should meet monthly or at least quarterly to review pledge management and payments received. As the campaign progresses, these meetings may be held less frequently over the three-year pledge pay-out period.

Members of this committee typically include the rector, the campaign chair, church treasurer, and two or three members of the current campaign leadership, as well as the staff bookkeeper (or another designee).

The bookkeeper (or designee) is tasked with managing pledge follow-up utilizing the Confidential Pledge Tracking Spreadsheet (Excel) provided at the beginning of the campaign. This Spreadsheet could be used separately as a tracking tool, or its data can be inserted into St. Paul's existing gift-tracking software. The following data is to be saved for future review by members of the Post-Campaign Review Committee:

- ✓ The capital campaign gift or pledge amount made by each donor to the campaign (including new donors added in the months/years ahead)
- ✓ Whether the pledge amount is to be paid at one time or over one, two or three years. This provides an ongoing cash flow report for all pledges received to date, payments received to date, and anticipated payments (how much will be paid each year into the future). This information will be necessary for planning by the Vestry. It is particularly helpful when seeking short-term construction financing or other debt service.
- ✓ The status of pledge payments

At its meetings, the Post-Campaign Review Committee will review:

- financial reports of pledge income and outstanding balances,
- "past due" balances,
- any new pledges received.

This important work to regularly review information is critical and provides:

- Ongoing accountability for the Capital Campaign;
- The ability to identify problems at an early stage, and to take action to minimize attrition;
- Information the Post-Campaign Review Committee needs to determine the types of reminder communications needed for the congregation and/or individual pledgers;
- An important record of your success that can help inform planning for possible future capital campaigns as well as ongoing annual stewardship ministry.

Regarding pledge management: The Post-Campaign Review Committee should ensure that notices and reminders are sent in a regular and timely manner. A procedure for follow-up of individuals who fall behind in their pledge payments should be discussed and implemented. Regular reminders will reduce the number of late payments and pledge attrition. Pledge management must also include giving careful attention to special instructions accompanying some gifts and pledges.

As always, appropriate acknowledgment and thanks should be sent back as soon as possible. ECF recommends sending acknowledgments within three days.

All original pledge cards and copies of acknowledgments should be maintained in a confidential file. These are original documents that confirm the pledges. As additional pledges are received during the follow-up phase, those pledge cards and copies of acknowledgment letters should be placed in the file. This file should also contain signed letters of intent concerning stock, gifts of property, and planned gifts. If contributions are received without an accompanying pledge card, the donor should be contacted to verify whether this is payment on a new pledge or a one-time gift.

## **2. REMINDERS: MAKE IT EASY TO PLEDGE**

Almost all your pledgers will elect to make their pledge payments either monthly, quarterly or annually. If there are exceptions, make sure to set them aside to track separately.

### ***Monthly pledges***

It is wise to ask if monthly pledgers would like giving envelopes to help keep them on track, or better yet to set up automatic payment from their bank account. If envelopes are wanted:

- Keep it simple; if the church has small return giving envelopes, use those.
- If not, use some generic small envelopes
- Affix a label with the church's address
- Label the envelopes 1-36
- Put a rubber band around these envelopes and put them in a larger envelope along with a letter that:
  - Thanks them for their commitment
  - Gives the amount of their pledge
  - States the amount of each monthly payment

### ***Quarterly and Annual Pledges***

A reminder should be sent to these folks two weeks before the anticipated "due date." The letter should:

- Thank them for their commitment
- Give the amount of their pledge
- State the amount of each quarterly/annual payment.
- Include a giving envelope addressed to the church

### **3. REPORTS**

#### ***To Pledgers/Donors:***

Reports on giving to the campaign can be incorporated into the regular reminders that congregants receive regarding their annual giving and/or special giving to the church, as long as this practice is at least quarterly.

Campaign giving needs to be clearly distinguished from annual/other giving. It can almost be guaranteed that over the course of the campaign someone will become confused as to whether a particular gift was a pledge payment, or something else. If/when this confusion arises, it should be dealt with directly by phone and/or in person.

#### ***To the Vestry:***

The vestry needs a monthly report that shows:

- The total amount given in the campaign;
- The total amount of pledges yet to be paid;
- The amount of pledges currently in arrears;
- The amount of campaign funds that have been spent on campaign projects;
- The amount of campaign funds remaining on deposit and available for use to complete campaign projects.

#### ***To the Congregation:***

At least quarterly, the congregation should be informed in an appropriate way (bulletin, newsletter, announcements, etc.) as to the amount of campaign funds collected and what progress is being made to complete the capital projects detailed in the final case statement for the campaign.

### **4. CONTINUE CAMPAIGN COMMUNICATION ACTIVITIES**

Regular communications regarding campaign progress and activities must be instituted and carried out aggressively and creatively. Reports of progress towards completing campaign objectives will enhance pledge collection efforts. Also, this publicity will help attract new donors.

Everyone likes to be appreciated. Consider publishing an annual Sunday insert, naming and thanking all those who gave to both the capital and annual campaigns in that year, (NOT amounts, just names). Many organizations publicly thank their donors.

Be sure to provide specific progress reports on how campaign funds are being used. Contributors appreciate being informed on a regular basis about how their gifts are being used.

A campaign committee member may wish to make a monthly, one-minute report during the Sunday services. These reports will serve the purpose of informing the congregation about the progress of the campaign objectives, reassuring them the project is firmly in hand, and helping them identify the person to whom they can direct their questions and concerns.

The fun and creative ways to celebrate progress have value beyond reminding people to pay their pledges. These kinds of activities build community and inspire positive attitudes – both of which will benefit future annual giving as well as capital and planned giving.

## 5. CONTINUE PLANNED GIVING EFFORTS

Individuals who indicated in the feasibility study that they would like information on planned giving have received such.

A Planned Giving Shepherd, Mark Lowery, has been identified. Your parish has received “Planned Giving on Demand” which contains all resources necessary for developing a robust Planned Giving ministry. A committee should be charged with the responsibility to provide regular programs and to serve as a resource and referral for interested parties.

Ongoing awareness of planned giving possibilities can continue to be promoted with other seminars, talks in Sunday School or to special groups, bulletin inserts, video presentations, and notices/ads in the church newsletter. *If you have established a planned giving recognition society*, anyone who commits in writing that they have remembered the church in their estate plans or through a planned gift, such as a pooled income fund or a trust, should be recognized in an appropriate fashion.

## 6. ENCOURAGE NEW MEMBER PARTICIPATION

Establish a process by which new members are given the opportunity to give to the **Rebuild, Restore, Renew** capital campaign at the same time they are considering their stewardship pledge. Include the campaign brochure with other materials in newcomer packets.

## 7. CONTINUE SPIRITUAL EMPHASIS

A spiritual emphasis should continue to be placed on campaign communications and activities. The Vestry and all parishioners should be encouraged to continue to lift up the projects in prayer, to use the campaign prayer, and to contemplate the spiritual lessons gained during the campaign.

Even beyond “campaign activities,” many phrases of St. Paul’s campaign prayer offer inspiration for the Vestry’s ongoing work and decisions.

### St. Paul’s Campaign Prayer

O God, you have been our cornerstone, chosen and precious, from the beginning. You led our pilgrim community to build this our fourth church, a place of worship, beauty, and community, where the children of the poor are given an advantage, and where other churches have found a home. Jesus, Living Stone, grant us a spirit of generosity and sacrifice for our capital campaign, so that our church will be renewed for ministry, and we may be built into a spiritual house of living stones, through the power of the Holy Spirit. Amen.

## **8. BENEFIT FROM TRAINING OF VOLUNTEERS IN PERSONAL INVITATIONS**

Continue using personal invitations in future stewardship activities. Capitalize on the inroads made this year by volunteers calling upon all members of the parish.

Vestry might consider other ways to use its leadership platform to encourage others to volunteer to help with stewardship/giving/capital campaign activities year 'round. Perhaps some of those who volunteered in the capital campaign might be "converted" to become annual stewardship volunteers.

To continue to build upon the improvements in annual stewardship practices, consider following the *Project Resource* model. Sample materials, including sample solicitation letters, calendars, and ideas for thanking, can be found at [www.project-resource.org/annual-giving/](http://www.project-resource.org/annual-giving/).

## **9. UTILIZE "ECF WHAT'S NEXT?"**

The completion of a capital campaign is cause for celebration. With the completion, the parish is empowered for its next phase in ministerial life. When ready for the next challenge, church leadership is invited to:

- Identify challenges and growth opportunities
- Articulate and prioritize needs
- Access other resource areas at the Episcopal Church Foundation.
- Provide participants with links to online resources for congregational leaders.

While this phase of your capital campaign is completed, the Episcopal Church Foundation seeks to continue providing your parish with the support it needs to live fully into its mission.

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

[www.ecfvp.org](http://www.ecfvp.org) (Vital Practices web site)