

**CAPITAL CAMPAIGN PLANNING STUDY**

**FOR**

**ST. ATHANASIUS ORTHODOX CHURCH**

**JANUARY, 2022**

**Prepared by**

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## **PURPOSE AND METHOD OF THE CAPITAL CAMPAIGN PLANNING STUDY**

This study was conducted by Warren Caterson to assess the dynamics concerning a proposed \$700,000 campaign for the retirement (or reduction) of the existing mortgage on behalf of St. Athanasius Orthodox Church, located in Nicholasville, Kentucky. Results from a campaign study would help determine if such a campaign is feasible at the moment, and if so, formulate a Case for Support (or Case Statement) that would explain the reason for the campaign in a compelling way, and would also help determine a campaign's financial goal, structure, and timeline. The report will also present other potential opportunities and goals that may compliment or augment the Campaign.

To implement the study, Warren Caterson (Counsel) conducted 28\* confidential interviews from October 2 – October 21, 2021. Study participants were selected by church leadership from among church members and the catechumenate whose participation would be critical to the success of the proposed campaign. In preparation for the interviews, the selected participants received a brief e-mail letter of introduction regarding the church's possible initiation of a capital campaign.

The personal interview format was designed to elicit advice, impressions, information and opinions relating to St. Athanasius Orthodox Church, the urgency and desirability of the proposed project, the viability of a major capital campaign, the availability of leaders and volunteers, and the availability of potential gifts. To ensure confidentiality, the notes taken by Counsel are not included in this report, but remain in his personal files.

The persons interviewed were asked a number of questions relating to their involvement and commitment to St. Athanasius and what they felt were the greatest strengths and concerns of the parish. They were also asked to respond to a Gift Chart, which reflects the approximate size and number of gifts required to raise \$700,000. In addition, study participants were asked to suggest other possible sources for the gifts listed on the Gift Chart, focusing, in particular, on leadership-level gifts.

Before conducting each interview, Counsel thanked each participant for their willingness to engage in the study. He also reminded them that any campaign that is conducted should continue to be an organic extension of who the parish is in Christ and must embody those things that the Lord is already doing in their midst. This may not be limited to a capital campaign to retire or reduce the mortgage debt, but may also address the Berea Mission as well as other dynamics at play in the Parish. In this way, a fundraising campaign is liturgical – the work of the people. This was reflected in the success of the last campaign that resulted in the construction of the existing temple. This is the reason the interview process included questions such as “What attracted you to St. Athanasius?”, “What is most important to you about St. Athanasius?” “What are St. Athanasius’ greatest strengths and challenges?” The answers to these and similar questions, set the tone for the remainder of the interview and helps remind the parish of who they are in Christ, putting the process of the fundraising campaign in proper perspective.

Following completion of the interviews, Counsel evaluated the data gathered and completed this report. While the planning study did not reveal that raising \$700,000 prior to 25<sup>th</sup> anniversary was likely, it did uncover other goals and concerns that will form the basis for continued discussions among the priest, parish council and the larger parish regarding the vision for the church over the next five years. Thoughtful consideration should be given to the feedback, advice and opinions of those who were interviewed. The findings and their interpretations, as well as the recommendations in this report, are presented to St. Athanasius Orthodox Church in the belief that alternate, or even parallel goals should be discussed prior to the 20<sup>th</sup> Anniversary Celebration in January.

\*This number reflects individuals and couples. Couples were generally interviewed as one entity but statistical variances in the subsequent charts will reflect any significant variance among couples. In addition, percentages may exceed 100% because participants offered several answers to the questions.

## **CRITERIA FOR A SUCCESSFUL CAMPAIGN**

The study undertaken on behalf of St. Athanasius Orthodox Church was designed to test several fundamental elements that are necessary for a successful capital campaign. The following elements reflect more than 20 years of experience in not-for-profit work:

***Favorable Image for the Project*** – The members of the church must believe that the project is required to meet the needs of the parish as well as the larger community.

***Adequate Source of Contributable Dollars*** – There must be adequate financial resources within the church to support the proposed campaign. In addition, the core group from which financial support will be solicited must be receptive to the proposed project.

***Strong and Enthusiastic Leadership*** – The nucleus of any campaign organization is the group that plans and authorizes the program. Therefore, the priest and parish council must be dedicated

to the cause and willing to support it generously with their time and financial support, presenting a unified commitment to the parish.

***Influential Campaign Leadership*** – The church must have access to outstanding volunteer leaders who can influence those with the capacity to make substantial commitments. Leadership generally flows outward from the parish council and the committees conducting the campaign and is an essential element in successful fundraising.

***Sense of Urgency*** – There must be a pervasive belief that the project is vitally important to the parish and it must be completed in expeditiously.

***Compelling Case Statement*** – The case must be compelling and present a logical plan to meet tangible needs. The case statement must also reflect acceptable fiscal parameters.

***Campaign Timing*** – The environment should be favorable to conducting a campaign. While this is generally more a reflection of commitment to the church and its programs rather than external factors such as the economy, one must take into consideration current and future COVID-19 protocols as they affect not only the economy, but church life as well.

## **PRE-STUDY RESEARCH**

### **CURRENT ECONOMIC REALITIES**

In 2021, IHS Global Insight released several summaries regarding its economic projections. Data from IHS Global Insight, has provided comprehensive economic, financial, and political coverage of countries, regions, and industries for over 50 years. Compared to other national forecasts, IHS Global Insight has a generally mainstream analysis which is why Counsel has often referred to them over the past 20 years.

#### **Highlights from the Summary:**

- In 2020 the economy endured its deepest recession in 74 years as COVID-19 disrupted lives and livelihoods.
- While the virus will be with us into 2022, effective and improved vaccines as well as viral and antibody treatments will be widely available to large segments of populations, facilitating a transition to the post-pandemic economy.
- Lingering consumer and business caution, diminishing fiscal support, and the strains of rising public and private debt have impacted our nation. Yet, the reopening of economies and the availability of vaccines will gradually unleash a new wave of spending on travel and services. With more spending opportunities, household saving rates will retreat from the unusually high levels of 2020.

- The COVID-19 pandemic, the energy transition from hydrocarbons to renewables, and related government interventions are continuing to disrupt markets around the world.
- COVID-19 concerns and worsening supply shortages will delay some US growth beyond 2022.
- US labor supply is an emerging constraint on economic growth. Despite rising wages and record job openings, the labor participation rate in September stood at 61.6%, well below its pre-pandemic level of 63.3%. Workers have been slow to return for a variety of reasons,
- Major shifts in household spending patterns, working from home, fiscal and monetary stimuli, and industry consolidation are contributing to market imbalances. With demand persistently outpacing disrupted supply, prices are rising to rebalance markets. The global forecast is characterized by lower near-term output growth, higher price inflation, and earlier interest rate increases compared with the earlier forecast.

### **THE ECONOMY AND CHARITABLE GIVING**

While the above predictions may in some ways be discouraging, it must be noted that recessions occur every five to ten years, with economic slowdowns scattered in between. The Giving USA Foundation conducts annual analyses of giving patterns describing challenges and opportunities for non-profits to successfully fundraise and they have found that overall giving saw an increase of 5% over the past year. These are some other observations from their latest report:

- Unprecedented developments (i.e., pandemic, economic crises, efforts to advance racial justice) in 2020 created intense, widespread need and significantly increased the demand upon nonprofit organizations. Remarkably, generous giving, coupled with the stock market turnaround in the final months of the year, boosted contributions. As a result, 2020 was the highest year of charitable giving on record.
- However, the nation’s overall economic picture remained mixed. It is important to recognize that the picture for individual households and organizations may have looked quite different, with many facing hardship even though total giving posted strong growth.”
- Many wealthier households were more insulated from the effects of COVID-19 and the ensuing economic shock, and they may have had greater capacity to give charitably than households and communities that were disproportionately affected and struggled financially

- Giving to religion grew slightly by 1.0% between 2019 and 2020, with an estimated \$131.08 billion in contributions. Adjusted for inflation, giving to religion was flat, reflecting a slight decline of 0.2% in 2020.

(*Giving USA Annual Report* as cited by the Lilly Family School of Philanthropy, 2021, Indianapolis, IN)

To recap: While overall giving increased in spite of the pandemic, that increase was drawn from those individuals and foundations who were least affected by the effects of the pandemic. Individuals and households whose lives were disrupted by the pandemic along with news reports highlighting bad news, shows that charitable giving has slowed, but it is still growing overall. In general, as income and wealth increase, so do the amounts that households give to charity.

### **TODAY'S ECONOMY AND YOUR CAPITAL CAMPAIGN**

Some sectors of the economy are recovering faster than others with many individuals and households still being affected by the pandemic, be it health concerns, savings or their ability to find and keep adequate employment.

The latest (2020) census shows that the median earnings per worker in Jessamine County shows \$44,930, which is the second most of all the counties in the greater region (Fayette County is higher). Income from all members in the household and it has a median of \$58,245 which is the second most of all the counties in the greater region. (Woodford County has a median household income of \$63,820). Comparing median household income to the U.S. average of \$62,843, Jessamine County is about 7.9% smaller. But, measured against the state of Kentucky, whose median household income is \$50,589, Jessamine County is 15.1% larger. Therefore, the economic state of Jessamine County is in a good place in regard to surrounding areas and even the national county.

In Jessamine County, 11.4% of those in the workforce are self-employed which is less than most other counties in the greater region. The county with the highest percentage of people self-employed in the area, Woodford County, shows a percentage self-employed at 15.2% (or 32.8% larger). This is important, because successful business owners and entrepreneurs often have the capacity and freedom to donate large gifts to a capital campaign, particularly church-related campaigns, which traditionally don't attract gifts from corporations and foundations.

And while St. Athanasius is located in Jessamine County, a number of parishioners reside in other counties. This, however, will not offer meaningful variances in statistical analyses due to the proximity the adjacent counties.

## CHRISTIAN GIVING DYNAMICS

According to the above-mentioned Giving USA 2021 report, giving to congregations, denominations, and missions grew 1% over the past year, but when compared to the overall 5% growth across the charitable sector, religious giving continues to lose market share. While religion is still the largest subsector (at 28% of total giving), the overall percentage has continued to decline rather drastically over the past few decades.

Yet, considering how COVID 19 affected both the economy and the shuttering of churches over the past year, the fact that giving remained essentially flat, should be considered good news. Many churches explored new ways to enhance giving opportunities in lieu of passing the basket, the most impactful was the implementation or enhancement of a robust on-line giving option.

At the same time, the challenges of the pandemic revealed an openness of churches to *respond* to change. When faced with disruption to traditional practices, some churches (like St. Athanasius) met the challenge, developing new capacities for live worship, coffee hour, and the use of outdoor events and gatherings.

In addition to the challenges forced on them by COVID 19, churches also faced increasingly declining trend in religious affiliation (i.e., ‘The None’s’), regular church membership, and church attendance that was in effect prior to the pandemic. This dynamic also affected church volunteerism and giving.

Unlike many churches, St. Athanasius actually saw an increase in membership, participation and giving during the pandemic due to the parish’s willingness and ability to think out of the box.

The Lilly Family School of Philanthropy (cited above) conducted a survey to look ahead to the key challenges for the rest of 2021 and into 2022. They found that many religious organizations are embracing an openness to prioritizing future-oriented goals. At the beginning of the pandemic, the initial response was adjusting and pivoting for survival. Now the emphasis is turning to strategic thinking and planning that’s grounded in the mission of the church as it serves the needs of the congregation and the larger community.

To that end, churches and other religious organizations are focusing on repurposing existing resources to produce a more streamlined and sustainable future. St. Athanasius is obviously serious about this by commissioning this study.

### **Summation**

As the above shows, Christians continued to give during the pandemic, especially if there were creative and easily managed ways to do so. St. Athanasius Orthodox Church has provided a needed service for both its members and the larger community and has exhibited good stewardship since its founding. In addition, while it is important to understand current economic realities, it must be noted that parishioners who were committed to the church, often continue to stretch and give during times of economic uncertainty.



**ST. ATHANASIUS INTERVIEWS  
FINDINGS AND ANALYSES**

The following findings are presented in statistical and narrative form. Specific and pertinent responses are quoted in order to present the spectrum of opinions that were offered. In order to preserve the confidentiality of the interview process, the sources of the representative comments are not identified.

**HOW LONG HAVE YOU BEEN A MEMBER OF ST. ATHANASIUS ORTHODOX  
CHURCH?**

Discovering the length of involvement with a parish or organization may usually (but not always) help project a person's potential dedication to a campaign. Of course, one must recognize that there are those new to a parish or organization that may bring with them a zeal and commitment to giving that outshines long-time members. But it is generally understood that those who have the longest association with the parish or organization may also have the strongest inclination to give.

**Findings:**

Of those interviewed, 21 have been members for less than six years, while those who have been members for seven or more years also total 21. (The numbers exceed 28 due to variances reflected in spouse membership).

| <u>1 – 3 Yrs.</u> | <u>4 – 6 Yrs</u> | <u>7 – 10 Yrs</u> | <u>More than 10</u> | <u>Catechumen</u> |
|-------------------|------------------|-------------------|---------------------|-------------------|
| 17                | 4                | 3                 | 18                  | 0                 |

**Analysis:**

These numbers reflect the relative newness of the participants as well as long-term members to St. Athanasius. While these numbers point to the vitality of the parish and its vision for outreach, the number of longer-term members is encouraging because Counsel has witnessed larger gifts coming from those who have the longest history with many non-profits. However, Counsel has also witnessed the giving of large gifts by those who are new and very excited about the church or organization.

## HOW DID YOU FIRST BECOME INVOLVED WITH ST. ATHANASIUS?

Discovering how each participant became involved with St. Athanasius is important because as a campaign launches and becomes a part of parish life, everyone needs to be reminded about why they first became involved in the church. This is also important when creating a case for support; the parish must ensure that the characteristics or methods that successfully engage people are an integral part of case statement.

### Findings:

| <u>Invited</u> | <u>Closest OCA Parish</u> | <u>Ministries/Clergy</u> | <u>Found It</u> |
|----------------|---------------------------|--------------------------|-----------------|
| 23             | 4                         | 0                        | 1               |

Not surprisingly, an overwhelming majority (82%) began attending St. Athanasius because someone who was already attending invited them. The balance of the participants cited the fact that St. Athanasius was the closest Orthodox Church (14%), or that they found St. Athanasius via advertising or on the internet (3.5%).

### Analysis:

Studies within the last decade\* show that personal invitations are the main reason people visit a particular church. This is no different with St. Athanasius. While location, facilities, and clergy may play a part in recent studies (21%), most people visit and join a religious congregation because someone they knew and trusted invited them (79%). As the members of St. Athanasius contemplate a fundraising campaign to retire the mortgage and eventually build a new temple, they must always remember the primary reason that they themselves were compelled to visit was because someone invited them. Any plan for debt retirement and new facilities must reflect and enhance this paradigm for effective outreach.

\*(The Institute for American Church Growth surveyed 10,000 church members and found that 75% first attended church because a friend or relative invited them. *Church Growth: America*. Published by the Institute for American Church Growth, Pasadena CA 91101).

## WHAT ATTRACTED YOU TO ST. ATHANASIUS?

As in the previous question, it is important to identify those characteristics that drew people into the parish because these characteristics must also play a crucial part in the case for support. The responses include multiple reasons by a number of people

### Findings:

| <u>Worship/Liturgy</u> | <u>Community/Hospitality</u> | <u>Fr. Justin</u>     | <u>History/Doctrine</u> |
|------------------------|------------------------------|-----------------------|-------------------------|
| 15                     | 14                           | 7                     | 7                       |
|                        | <u>Parents/Friends</u>       | <u>OCA affiliated</u> |                         |
|                        | 5                            | 2                     |                         |

The two specifically identified characteristics of St. Athanasius that had the most impact on a person's desire to attend and involved were worship/liturgy (30%) and the sense of community, including hospitality (28%). This was followed by Fr. Justin as the priest (14%), history/doctrine (14%), parents/friends (10%), and because it is OCA (4%). Participants who cited worship/liturgy spoke of the beauty of the services, the choir, congregational singing, the sense of prayerful worship and the beauty of our physical space in regard to that worship. Community/hospitality cited the common meal, engagement in diverse ages, and a willingness to help others in need.

### Analysis:

After people have visited St. Athanasius, they continue to return based on the beauty and meaning of the liturgy as well as the sense of community and hospitality they experience in the parish. The time spent rehearsing the music of the liturgy and the congregational participation in the liturgy has also had a significant impact on many participants. The hospitality and sense of community, particularly during the common meal, is also important in attracting and keeping visitors (although with the continued growth of the parish, some strain is evident regarding the common meal and other growing pains).

### Representative Responses:

*"What do I like about St. Athanasius? Everything!"*

*"I love that there are so many kids and other age groups."*

*“I don’t know what I’d do, knowing my situation, if it wasn’t for Fr. Justin.”*

*“I believe that building the church and providing a community hall has really helped us growth-wise. Both physically and spiritually.”*

*“I love the history and doctrine. It is very Chestertonian, lol.”*

*“It wasn’t much of a choice. My parents took me here when I was young. But I wouldn’t go to anywhere else!”*

## **WHAT DO YOU BELIEVE ARE ST. ATHANASIUS’ GREATEST STRENGTHS?**

It is always important to discover a parish’s greatest strengths because it is these characteristics that will keep the parish motivated and on the same page as we explore a potential campaign to reduce/retire our debt and eventually build another temple. Understanding these characteristics also helps remind the parish that any campaign statement should be included these strengths.

### **Findings:**

When asked to reflect on the parish’s strengths, participants were enthusiastic in their responses. Counsel has taken the wide variety of those responses offered and narrowed them down to six broad characteristics.

|                                    |     |
|------------------------------------|-----|
| Worship/liturgy (including beauty) | 89% |
| Community/Hospitality              | 71% |
| Fr. Justin                         | 61% |
| Education/Discipleship             | 32% |
| Youth and Families                 | 29% |
| Outreach/Converts                  | 21% |

### **Analysis:**

Counsel notes that the variety of the answers shows the marks of a growing and healthy parish. Not surprisingly, Worship (89%) and Community (71%) were listed again at the top the list of our parish strengths. People felt that the continued growth of the choir along with the sacred space of our own building has truly made a difference, both as a community and as individuals.

Worship and Community were closely followed by Fr. Justin and the leadership, counsel, and love for the parish that he offers to the community (61%). Education and Discipleship (32%) cited participants for those in a leadership, both as clergy and lay volunteers.

The Youth and Families of the parish were also seen as a sustaining strength; the fact that the parish is seeing more and more families grow up to be part of the church is not only an inspiration for the parents of those young people, but by older members and those who have come to St. Athanasius from other Orthodox communities. Counsel was encouraged to note that several parish families have seen their children grow into faithful young adults.

Counsel continued to be encouraged by the strengths of those responded who see Outreach/Converts remain such a vital part of the parish.

All of the strengths above shows that the community is still very much a synergy between our relationship with God and with the people that He has entrusted to them as a parish. On a side note, nearly all of the participants (who were part of the building project several years ago) felt that remaining in Nicholasville was absolutely the right thing to do. They felt that being part of the city and all the opportunities (from participation in liturgy, other parish opportunities, and outreach to our community) would have been diminished if the church chose to move elsewhere.

However, several of the strengths listed by the participants felt those elements may also be some of our challenges. Counsel will review those the next section.

### **Representative Responses:**

*"I love the liturgy and seeing so many of my church friends. I missed it so much when COVID curtailed things a bit."*

*"It makes me so happy to see so many children and young adults active in our church."*

*"I can sit with anybody in the church and feel like I can talk to them."*

*"Fr. Justin is a priest for everyone. Young or old."*

*"The choir keeps getting better and better. We are blessed!"*

*"There was a lot of pain over the past year due to COVID and also from several family issues. But our parish stepped up."*

*"A lot of enthusiasm. I've never seen it in any other Orthodox church I've attended. The converts bring a lot of that."*

*"I like our balance of outreach and pastoral care. Fr. Justin is great at that."*

*"I feel, and I think many do, that St. Athanasius helps me keep rooted and anchored."*

*"The Common Meal is one of our favorite times outside of the liturgy itself."*

## WHAT ARE THE GREATEST CHALLENGES?

While the strengths listed above are overwhelmingly positive, there are a number of challenges that need to be addressed in order to launch another campaign. This is important because as the parish continues to grow, there will be issues that will have an impact on the direction a campaign may or may not take.

### Findings:

Once again, there were a wide variety of responses so Counsel narrowed these down so several related categories.

|                                      |     |
|--------------------------------------|-----|
| Coordination/Administrative concerns | 65% |
| Fr. Justin and Burnout               | 46% |
| Money/Income                         | 25% |
| Growth (in feeling left-out)         | 18% |
| Growth (in space)                    | 18% |
| Distance                             | 14% |
| Youth/Maturity                       | 11% |

### Analysis:

As is the case with many church dynamics, many of St. Athanasius' strengths may also be some of its challenges. While many of the challenges directly affect another capital campaign (i.e., Money, Youth/Maturity) some of the challenges were affected it in-directly. The relative youth of the parish continues to be a challenge (as it was for the first campaign) and while many have grown into adulthood, most are still in their formative stages: raising young families and building careers. They have not yet been able to offer the financial assistance to a campaign that others who might be more established. Alternately, as an aside, several who were at the 'distribution' phase in their careers (established careers with children grown) have moved on to their retirement, thus affecting the ability to give due to fixed or limited income. However, these empty-nesters are in a position to start thinking about estate planning for the parish (stock gifts, legacy gifts, wills and other large gift instruments). Counsel agrees that continuing to broaden

the church's demographic to include older and more mature members would not only be beneficial for the day-to-day finances of the church, but would also have a positive effect on a future capital campaign. This process may be propelled forward by ensuring that programs for older parishioners receive the same encouragement as young people and families.

However, the primary concern for a majority of the respondents was the need to address administrative concerns and burnout for Fr. Justin. Most respondents who suggested those challenges felt that, with limited parish income, the need to spend those dollars to invest in administrative concerns and pastoral burnout supersedes the need to pay off the mortgage or build another temple.

This is what Counsel means when stating that our Strengths may also be our Challenges. The number of services, hospitality, education, and Fr. Justin himself will be diminished if these assets are affected due to burnout.

### **Representative Responses:**

*"We love that we're growing. And I love Fr. Justin. Everybody does! But we need pastoral help."*

*"I know people are very, very generous to the parish. But we don't have the heavy-hitters that we see at the really big churches, so we have to be more strategic about how we use our money."*

*"We already have a lot of programs. And we're always looking at more. That's a good thing. Now we need mature leaders to help lead them. It can't be all on Father or a few others."*

*"I love the common meal, it's one of our favorite parts. But the cost is rising and the time for the few people who help is becoming overwhelming."*

*"Too few people seem to do all the work. But I don't know how to fix that except with more leaders."*

*"With limited resources, we need to decide as a parish where needs to be met before we look to a campaign. I don't want to lose what we already have because we got swamped."*

*"Balance, growth and stability is a tension in every good parish. We need to address it on a regular basis."*

*"Fr. Justin is burning the candle at both ends. That's not good."*

### **HOW INVOLVED DO YOU CONSIDER YOURSELF TO BE IN THE CHURCH?**

Counsel asked participants to indicate how involved they were in the life of the church. This is important because the level of one's commitment to a parish or organization often has a direct correlation on one's desire to participate financially in a campaign - the deeper that people are involved, the deeper the commitment to the success of any given campaign.

**Findings:**

Here are their responses:

| <u>Very Involved</u> | <u>Involved</u> | <u>Somewhat Involved</u> | <u>Not Involved</u> | <u>Want to Be Involved</u> |
|----------------------|-----------------|--------------------------|---------------------|----------------------------|
| 19                   | 7               | 4                        | 0                   | 0                          |

**Analysis:**

Counsel was very encouraged that most participants feel that they are either very involved or involved (87%). Those that responded 'somewhat involved' did so due to circumstances such as family, illness or distance. These numbers show that even during the COVID restrictions and protocols, people were involved in the life of the church as they were able. Counsel saw that this overwhelming involvement of the parish also played a big part in the first capital campaign.

**HOW HAS YOUR RELATIONSHIP WITH ST. ATHANASIUS AFFECTED YOU PERSONALLY?**

**Findings:**

Counsel had the opportunity to allow participants to comment on how their participation in the life of the church has affected them on a personal level. While the responses were as varied as the list of individual participants, Counsel was encouraged and inspired to hear so many very personal stories about the impact that Orthodoxy and St. Athanasius has had on so many lives. The personal responses and stories reflected the overall strengths of the parish listed earlier.

*"The church has so many role models; from kids to college kids."*

*"I've met so many people who have folks like me – sharing the same struggles and victories."*

*"This is my tribe. All of my roommates and other several other friends attend St. Athanasius"*

*"One of the best things are the support: physically, emotionally, and spiritually."*

*"I find something that is bigger than myself."*



*“The liturgy grows both spiritually and healing.”*

*“My identity is wrapped up in the total life of the parish.”*

### **WHAT ABOUT ST. ATHANASIUS IS MOST IMPORTANT TO YOU?**

In asking this question, Counsel was seeking to find out what each participant saw as a non-negotiable. In other words, what they would not want to sacrifice as the church moved forward with its plans for eliminating the debt. Of course, several non-negotiables are understood: Orthodoxy and worship, for instance. Instead, this question seeks to reveal those characteristics that make up St. Athanasius as a particular and distinct community – characteristics that people would not want to lose during growth and expansion. These numbers, like some other findings, are higher due to the very personal nature of the question; spouses may have chosen different answers from one another.

#### **Findings:**

|                               |    |
|-------------------------------|----|
| Community/Hospitality         | 11 |
| Counsel/Discipleship          | 10 |
| Feeling of Personal Belonging | 10 |

#### **Analysis:**

Surprisingly, the participants were pretty divided between just three responses. However, the responses show how they all revolved personal relationships. Not a single participant mentioned a building, particular program, or personality. This shows that St. Athanasius is truly a family and community, not something that one simply attends or subscribes to.

### **WHAT THREE WORDS DESCRIBE ST. ATHANASIUS?**

Participants were asked to think of three distinct words to describe St. Athanasius. Consider these ‘buzz words’. Counsel asked participants not to think too much about the answers; these were to be immediate and from the heart. This helped identify any consensus as to what people believe about the parish, or indeed, about themselves. This is important, because while exploring a campaign, it’s imperative that the parish not lose sight of who they truly ‘are’. Once again, participants gave very diverse responses due to the personal nature of the question.

**Findings:**

|           |     |              |     |
|-----------|-----|--------------|-----|
| Worship   | 40% | Joyful       | 16% |
| Community | 33% | Friendly     | 16% |
| Welcoming | 33% | Discipleship | 13% |
| Growth    | 17% | Authentic    | 16% |
| Home      | 16% | Beauty       | 3%  |

Also cited by some of the participants:

|             |           |
|-------------|-----------|
| Encouraging | Rich      |
| Traditional | Dynamic   |
| Wholeness   | Deep      |
| Fulness     | Sane      |
| Vibrant     | Faith     |
| Safe        | Active    |
| Chaotic     | Loving    |
| Diverse     | Committed |
| Mystical    | Dynamic   |

**WHAT LEVEL OF KNOWLEDGE DO YOU HAVE TO LAUNCH A CAMPAIGN FIVE YEARS FROM NOW TO BUILD A NEW TEMPLE?**

It is important to understand what levels of knowledge participants have about the campaign. It is important that moving forward, parishioners (in particular those who have been members for a number of years or in leadership) have a sense of what and why the campaign is being considered.

**Findings:**

| <u>A Great Deal</u> | <u>Some</u> | <u>Little</u> | <u>Very Little</u> | <u>None</u> |
|---------------------|-------------|---------------|--------------------|-------------|
| 7                   | 10          | 4             | 9                  |             |

**Analysis:**

Interestingly, only 17 out of 30 participants had ‘A Great Deal’ of ‘Some Knowledge’ of the project. Those who had ‘Some Knowledge’ were confused about the nature of the campaign: Was it retiring debt or building a temple, or is it both? More interesting was the fact that 13 had ‘Little’ or ‘Very Little’ knowledge of the campaign. The fact that only 1/4 of the participants had ‘A Great Deal’ of knowledge tells us that more people need to be informed about the campaign prior to launching.

**BEFORE BEGINNING A CAMPAIGN TO RAISE THE MONEY TO BUILD A NEW TEMPLE, A PROPOSAL HAS BEEN MADE LAUNCH A CAMPAIGN ON THE 20<sup>TH</sup> ANNIVERSARY TO PAY OFF THE EXISTING MORTGAGE FIRST. DO YOU THINK THAT IS A GOOD PLAN?**

After explaining the idea of launching a Campaign to reduce or retire our existing mortgage, participants were asked if that a good plan of action.

**Findings:**

| <u>Yes</u> | <u>No</u> | <u>Don't know</u> |
|------------|-----------|-------------------|
| 27         | 0         | 3                 |

**Analysis:**

An overwhelming majority of those interviewed believed that paying off the debt over the next three – five years was a good idea. The three participants who answered ‘Don’t Know’ felt that they needed more financial information to offer an educated response.

*“It’s always better to pay off existing debt before adding more in my book”.*

*“We have generous people and have a lot of faith and vision, but we’re not a wealthy parish. We need to be wise about our resources.”*

*“I think it would impact ministries and other missions if we over-burden loans”*

*“This is how my own household tries to operate. Pay debt before taking on more.”*

*“I’d like to find out more information. Particularly what our current terms are. If our percentage is very low it might be better to keep the loan. It could be like ‘free money’.”*

*“I’m willing to discuss this with myself and other finance people before saying yes or know to a campaign.”*

### **WHAT IS MOST COMPELLING ABOUT THE PROJECT?**

Participants were then asked what was most compelling to them about paying off debt before building a new temple.

#### **Findings:**

|                                          |     |
|------------------------------------------|-----|
| Debt-free is ideal before taking on more | 90% |
| Grow and add more ministries             | 60% |
| Will help with local missions            | 27% |
| It could be a good idea, not sure        | 10% |

#### **Analysis:**

Not surprisingly, there was a nearly unanimous consensus that paying off existing debt prior to expanding the church campus was favorable. However, quite a few listed two other benefits: building our own ministries and creating other missions. This is important because it shows that while many are thinking simply of retiring the debt of one building before building another, others cited several other benefits. This level of agreement is an important component for any fundraising campaign.

### **WHAT IS YOUR GREATEST CONCERN ABOUT THE PROJECT?**

Participants were then asked what their greatest concerns would be should the parish move forward with a campaign to retire the current mortgage (approx. \$700,000).

### **Findings:**

|                                             |      |
|---------------------------------------------|------|
| Not raising that much money in 3 – 5 years  | 100% |
| Need for more information                   | 80%  |
| How it would affect our already short staff | 70%  |
| How it would affect other ministries        | 60%  |
| How it would affect the Berea Mission       | 17%  |

### **Analysis:**

While participants were all nearly unanimous that we should be debt-free before embarking a new building campaign, 100% wondered if it would be feasible to so in three - five years. Reasons cited include the many young adults and a growing retiree population. Many wondered if we have the financial resources to stretch that much in such a short time; particularly since other needs are growing as well. Some also felt that two back-to-back campaigns (one to retire the debt and one to build a new temple) may result in “donor burnout”. These concerns are extremely important and will have to be addressed with the collective participation and wisdom of the parish leadership and the entire parish as well. Bottom line? While there will always be concerns about any campaign, they need to be addressed in such a way that there is a true buy-in before embarking on such a large project.

### **Representative Responses:**

*“I want to be sure that everyone is pretty fully committed before moving forward.”*

*“Me? I think it’ll take more than five years.”*

*“Can we do it without sacrificing our current ministries? I’d hate to see that happen.”*

*“I’m not sure, looking at our parish, where the money would come from so quickly.”*

*“Too many competing priorities right now: programs and ministries, missions, and the fact that we desperately need more staff. Especially Fr. Justin.”*

**A SUGGESTION HAS BEEN MADE THAT A PORTION OF THE CAMPAIGN BE DIRECTED TOWARD THE GROWTH OF THE BEREA MISSION. HOW DO YOU FEEL ABOUT THAT?**

Counsel then asked that if a campaign were to proceed, how would you feel a portion of the monies raised (either via a percentage or firm amount) be used for the growth of the Berea Mission.

## Findings

| <u>I like it</u> | <u>I don't like it</u> | <u>Need more information</u> | <u>No opinion</u> |
|------------------|------------------------|------------------------------|-------------------|
| 5                | 15                     | 7                            | 2                 |

## Analysis

Counsel learned that only five participants liked the idea of adding the funding for missions as part of the campaign (and most were members of the mission). Those who thought it wasn't prudent stated that retiring the debt would already be a huge financial task and will add even more financial stress for our parish. Seven noted that they need more information regarding the cost and two had no opinion on it. Those who didn't like the idea of combining the campaign were not against the Berea Mission, they just felt that it should be either self-supporting, a line-item budget, or a separate fund.

It was also interesting to note that a large number of participants did not fully understand the process of the mission, at least on a financial level. Many understood that we would be totally funding the Berea Mission completely out of our finances (whether for the campaign or line item) in addition to the members who attend there. Very few realized that the funding of the mission has other resources at the mission's disposal: the national church, the diocese, and Orthodox Christians who may live somewhere else yet will support them financially. Essentially, it is a three (or four) legged stool for funding. When broached with that information, those who were initially opposed to the funding of the mission were more open to it knowing that our parish was not the only source of funding. This speaks for the importance for information for financing this, and other, missions.

## Representative Responses:

*"I like the idea of missions. It's been part of our vision since we were starting ourselves."*

*"I think it would work better if there was a line-item budget or a separate fund. A separate fund would allow those who are really into the mission to really get behind it."*

*"I think funding a mission would also help with our current space. As people branch out to Berea (or any other mission) there's more room for our own growth until we have the money to build a new church."*

*"If we start missions, it should be seed money that will be sustainable in the near future. I didn't know about potential funding from the diocese or OCA. I'm glad I know that."*

*“I am all for funding other missions. It’s in our DNA, lol. But I think we’re already stretched financially with the need for staff. I don’t have a solution. I just see it.”*

**DO YOU BELIEVE RAISING \$700,000+ IS A REALISTIC GOAL AT THIS TIME?**

If the parish decided retire the debt with a campaign goal of \$700,000+ (this figure is not firm because we don’t know if the Berea Mission would be part of the process) is it a probable goal for the parish.

**Findings:**

| <u>Yes</u> | <u>No</u> | <u>Maybe</u> | <u>Don’t Know</u> |
|------------|-----------|--------------|-------------------|
| 2          | 4         | 9            | 12                |

**Analysis:**

As can be seen, only two participants felt that a \$700,000 goal would be possible at this time. four felt a definite no, nine maybe but it’d be a stretch, and twelve felt they didn’t have enough information about the capacity of other parishioners to proffer an opinion. This is critical because a campaign’s success is directly influenced by the confidence of the donors who participate. While a vast majority felt that retiring the debt before embarking on a new campaign to build a new temple was imperative, most felt that it is not attainable at this time, primarily because they lacked information about resources of our particular parishioners. If there was a consensus that if the majority of the participants were overwhelmingly enthusiastic about the project, they may be persuaded to bring others to participate and stretch themselves financially.

Since over 92% of the participants are not convinced that the goal is achievable, it would do well for the parish to consider a goal that most members could agree upon.

**Representative Responses:**

*“I don’t know enough about other member’s financial situation to decide if we can do it. I know giving more than my current tithe is already a stretch for me.”*

*“I’ve seen some of the numbers. I don’t think we can do it at this time, especially with COVID and the economy.”*

*“Perhaps it doesn’t have to be all or nothing? Can we do a campaign to reduce the debt if we can’t retire it?”*

*“I know a lot of my friends are starting families right now. I’m not sure if any of us are in a position to give much more than we already give.”*

*“I’d like to hear about more options. What is our current interest rate, what do we owe, how did we do on the last campaign, etc.”?*

**WOULD YOU AGREE WITH A RECOMMENDATION THAT A 3 OR 5 YEAR CAPITAL CAMPAIGN BE CONSIDERED TO RETIRE THE DEBT SHOULD AT LEAST BE CONSIDERED?**

| <u>Strongly Agree</u> | <u>Agree</u> | <u>Somewhat Agree</u> | <u>Don’t Agree</u> | <u>No Opinion</u> |
|-----------------------|--------------|-----------------------|--------------------|-------------------|
| 22                    | 3            | 0                     | 1                  | 1                 |

**Analysis:**

Given the idea that retiring the mortgage before embarking on a new campaign is attractive to almost everyone, it is not surprising that, although such a campaign would be a stretch, it should be at least considered. Counsel agrees knowing that many of those responded in the last few questions felt that they needed more information to render an honest assessment. Counsel therefore suggests that those members of the parish council and those in finance, host some parish-wide meetings to provide more information regarding parish current finances (particularly regarding the current mortgage), details on the first campaign, and issues regarding funding for the Berea Mission.

**Representative Responses:**

*“It’s a great idea. I think it should at least be considered.”*

*“Who’d not want to pay off debt? Lol!”*

*“I think people would be more open to it if we at least considered all the pros and cons”.*

*“There’s no reason that we shouldn’t at least consider it. After all, we might be surprised.”*

*“If we consider and discuss it, maybe other ideas we haven’t thought of might come up.”*

**WOULD YOU BE WILLING TO MAKE A THREE TO FIVE YEAR PLEDGE TO THE CAMPAIGN THAT IS OVER AND ABOVE YOUR GENERAL TITHE/GIVING?**

Participants were then asked if they would personally be interested in making a pledge over a period of years to retire the mortgage debt.



| <b>Yes</b> | <b>No</b> | <b>Maybe</b> |
|------------|-----------|--------------|
| 25         | 1         | 2            |

**Analysis:**

The answers of this question are very much aligned with the preceding ones. And while only two people felt that a \$700,00 goal was a realistic one, a vast majority felt that it should at least be considered. Participants felt that after enough information, planning and consensus, the campaign should choose to advance, 25 of those responded would participate. Those who said either no or maybe did not do so out of vision, but simply due to their personal circumstances. But I'd be remiss to address that although most would participate in a campaign if asked, most also believe that it is not feasible at this time.

**Representative Responses:**

*"I'm willing to give above and beyond. I'm not sure it will add a lot to the campaign, but I'm in."*

*"Unfortunately, I'm retired now and won't be able to give as much as I did the first time around."*

*"I think our parish will rally around. We did when we came up short at the end of the year and we made it work. But it's still a lot of money."*

*"I'm willing, but not sure to what extent because of the current economy."*

**DO YOU BELIEVE THE PROJECT CAN ATTRACT LEADERSHIP GIFTS?  
(DEFINED BY THE CAMPAIGN GOAL)**

In order for a campaign of this magnitude to succeed, constituents must share two beliefs. First, they must believe that the project is worthy of support. Second, they must believe that a campaign is the best method or the only method to fund the proposed objectives. Since over 80% of the funding for many campaigns comes from just 20% of the people, participants were asked if they believe this project can attract leadership gifts consistent with the gift chart. (Leadership gifts at this level would mean those who could give \$50,000 - \$75,000 over 5 years).

**Findings:**

| <b>Yes</b> | <b>No</b> | <b>Maybe</b> | <b>Don't Know</b> |
|------------|-----------|--------------|-------------------|
| 2          | 1         | 0            | 25                |

**Analysis:**

Once again, the difference between those that believed that leadership gifts (those at the top of the gift chart) could be secured (two) and those who said “No” or “Don’t Know” (26) is revealing. This response mirrors the one above where participants were asked if a \$700,000 goal is achievable. This level of uncertainty also affects donor’s confidence in the success of the campaign.

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**HOW WOULD YOU RATE THIS CAMPAIGN AMONG YOUR OWN  
PHILANTHROPIC INTERESTS?**

For a church fundraising endeavor to be successful, both staff and members must first embrace the project and give it the highest priority ranking among other philanthropic interests (i.e., Habitat for Humanity, Nature Conservancy, Food Bank and others), at least during the course of the proposed campaign. To ascertain the degree to which this project would be important to parishioners, each person was asked to prioritize a capital campaign for St. Athanasius among his or her other philanthropic interests and activities.

| <u>High</u> | <u>Medium-High</u> | <u>Medium</u> | <u>Medium-Low</u> | <u>Low</u> |
|-------------|--------------------|---------------|-------------------|------------|
| 22          | 6                  | 0             | 0                 | 0          |

**Analysis:**

Counsel was encouraged that over 100% of the participants rated a campaign as High or Medium-High in relation to their other philanthropic interests. The fact that most participants feel that a goal of \$700,000 was unattainable was not due to a lack of commitment to the cause.

Counsel is assured that a \$700,000 goal would be achievable if the parish had the financial revenue to provide it.

**IF YOU WERE COMMITTED TO SUPPORT THIS CAMPAIGN, WHERE WOULD YOU SEE YOURSELF ON THIS GIFT CHART?**

Counsel created a Campaign Gift Chart based on established models within the fundraising community. While these figures are not hard and fast, they do give an indication as to what the fundraising potential among the participants would be. Counsel emphasized to the participants that their answers should reflect their current situation rather than potential changes in the future (i.e., possible raises, bonuses, inheritances, etc.). This would give a more realistic idea of the funding potential from among the participants and any future ‘windfall’ would thus be icing on the cake. It is better to establish a realistic expectation for the campaign and exceed it, rather than create a more-than-hopeful assessment and fall short.

**Findings:**

Everyone appeared to give thoughtful consideration to his or her answers. The total amount indicated by the participants fell just short of \$300,000. The table on the left would be the gift amount and aggregation (over a five year pledge) of gifts needed to complete a \$700,000+ campaign and the table on right shows the gifts and aggregation (over a five year pledge) of those participating in the study:

|                    |               |    |                  |                  |   |                |
|--------------------|---------------|----|------------------|------------------|---|----------------|
| \$75,000           | Gifts needed: | 1  | \$75,000         | Gifts indicated: | 0 | 0              |
| \$50,000.          | Gifts needed: | 2  | \$100,000        | Gifts indicated: | 0 | 0              |
| \$25,000.          | Gifts needed: | 5  | \$125,000        | Gifts indicated: | 7 | \$175,000      |
| \$15,000.          | Gifts needed: | 8  | \$120,000        | Gifts indicated: | 2 | \$30,000       |
| \$10,000.          | Gifts needed: | 10 | \$100,000        | Gifts indicated: | 5 | \$50,000       |
| \$5,000            | Gifts needed: | 20 | \$100,000        | Gifts indicated: | 7 | \$35,000       |
| Many under \$5,000 |               |    | <u>\$100,000</u> | Gifts indicated: | 6 | <u>\$9,000</u> |
|                    |               |    | \$ 720,000       |                  |   | \$299,000      |

### **Analysis:**

Due to the relative youth, the number of growing families, retirees, and onset of COVID and the economy, it's not surprising that a majority of the responses skewed toward the bottom of the chart. Based on previous responses on how high a campaign would rate among participant's other philanthropic interests, it is clear that these numbers do not reflect a lack desire or commitment, but instead reflect the age of our parishioners, a need for more information, and current economic realities. Also of note is the dearth of lead donors, i.e., those in the \$50,000 - \$75,000 range. Campaign success is predicated by the existence of leadership level donors to help counteract those who commit to lower levels; some of whom may only be able to commit \$500 over five years. Counsel suggests improving our financials and possibly revising the campaign goal to reflect these current realities.

### **WOULD YOU BE INTERESTED IN A MEMORIAL GIFT OR OTHER FINANCIAL INSTRUMENT BE A PART IN THE CAMPAIGN?**

The opportunity for a memorial or naming gift is an important consideration with any building campaign. Some donors express a sincere desire to honor themselves or a loved one with a contribution to a campaign. One needs only look at the buildings, endowments and naming opportunities that dotted the national non-profit landscape to see this is very common. Counsel sought to determine if there was an interest in a memorial gift so that could be communicated with the parish council and building committee so adequate naming opportunities could be created or identified.

**Findings:**

| <u>Yes</u> | <u>No</u> | <u>Don't Know</u> |
|------------|-----------|-------------------|
| 3          | 21        | 3                 |

Counsel's low positive response is due to the demographics of our parish. Most of the members who are retired do not have the financial resources to provide financial instruments like charitable remainder trusts, annuities, and gifts of appreciated stock. However, the fact that St. Athanasius is not only growing numerically, but also spiritually, bodes well for the financial future of the parish as they succeed either in business or enter their golden years.

**ARE THERE ANY SPECIFIC CHANGES, ADDITIONS OR DELETIONS TO THE PLAN THAT WOULD SIGNIFICANTLY CHANGE THE CONTRIBUTION YOU PLAN TO GIVE TO THE CAPITAL FUND CAMPAIGN?**

Changes or additions are often changed with campaigns encompass building projects: i. e. location, architectural specs like front elevations, square footage, landscaping, etc. Because of the simplicity of the campaign (retire the debt) a vast majority don't foresee any significant changes and additions that would affect their participation.

**ARE THERE OTHERS, OUTSIDE OF THE PARISH THAT YOU FEEL WOULD BE INTERESTED IN ST. ATHANASIUS AND SHOULD BE APPROACHED ABOUT THE CAMPAIGN? AND IF SO, WHO?**

**Findings:**

While 18 participants felt that there might be funds available outside the parish for the campaign, no one could confidentially suggest anyone specifically. Possible suggestions included the Diocese of the South, previous donors who no longer live here but have passion, and parents, grandparents, or other relatives of current members. One participant mentioned a potential estate gift from a close parishioner, but there is not enough detail to see this as something worth relying on at this point.

**Analysis:**

While many capital campaigns typically attract funding from beyond the constituency that benefits directly from the programs a non-profit has to offer (i.e., alumni, local and federal

government, foundations, philanthropists) most church fundraising campaigns find a majority of their funding from within the parish. A difference in that model could be seen from former long-time parishioners who have retired to another state. While they may be attending a new parish close to their adopted home, their hearts remain in the parish where they grew up or raised their families. Since St. Athanasius is having more young families, this possibility for funding may be possibly be a resource.

While it would be good to explore outside funding for the campaign, Counsel recommends that the parish not focus on this, but instead focus on the funding that would be contributed by the current members of the parish, previous campaign donors, and perhaps, the Diocese of the South.

Had specific major-donor prospects been revealed through the course of the interviews, Counsel would have approached Fr. Justin to explore the possibility of including these individuals in the study.

**WOULD YOU BE WILLING, WITH THE ASSISTANCE OF THE CHURCH LEADERS AND STAFF, TO HELP SOLICIT YOUR PEERS AND COLLEAGUES FOR THE CAMPAIGN?**

More than any other factor, the success of the proposed campaign is dependent upon the enlistment, dedication, and effort of volunteer leadership that infuses the campaign with the level of confidence and credibility required for success. Effective leadership helps bring a sense of urgency to the project and attracts the attention of other volunteers and donors. While both the Priest and parish council may avail themselves as solicitors in the campaign, there is something very compelling when peers solicit peers for gifts.

**Findings:**

| <u>Yes</u> | <u>No</u> | <u>Maybe</u> |
|------------|-----------|--------------|
| 15         | 10        | 3            |

**Analysis:**

Counsel was encouraged by the number of people who offered to assist with solicitations since this is sometimes the most difficult volunteer position to fill, especially among people who are new to the campaign process. While Counsel recognizes that asking for a gift is not something that many of us want to do, it is inspiring to note that more than half of the participants said they would be willing to do so. Those who cited ‘Maybe’ did so depending on time and more information.

### **WOULD YOU BE WILLING TO SERVE AS A VOLUNTEER ON THE CAMPAIGN?**

Recognizing that many people are not comfortable soliciting gifts for a campaign, Counsel asked if participants would be willing to volunteer in another capacity, such as event planning and execution or administrative work.

#### **Findings:**

| <u>Yes</u> | <u>No</u> | <u>Maybe</u> |
|------------|-----------|--------------|
| 29         | 3         | 2            |

#### **Analysis:**

Counsel was very encouraged that a vast majority of the participants agreed to volunteer for the campaign wherever their talents and time would allow. Those who responded “No” or “Maybe” did so because of overwhelming work or home commitments.

### **ARE THERE ANY OTHER ASPECTS OF THE PROJECT THAT YOU WOULD LIKE ADDITIONAL INFORMATION, OR ANY PART OF THE PROJECT THAT NEEDS FURTHER INFORMATION?**

Nearly all of the participants said ‘Yes’. Primary reasons were how to balance funding for a campaign to retire the debt while growing our pastoral staff and maintain our growing ministries. Many asked if it would be wise or possible to simply to reduce the debt instead of retiring it. Some would like us to spend our time and money recruiting resources to build up and reenergize our parish and ministries, particularly after COVID. These concerns reflect many of the answers in the survey that Counsel unearthed.

### **ADDITIONAL OBSERVATIONS**

Because of the thoughtful responses of participants, this study has identified relatively few number of strengths on which a campaign can be considered as *it stands now*. Participants revealed a number of challenges that must be addressed in order to maximize the results of such an undertaking. The following observations are presented as a result of the campaign planning

study conducted by Counsel and as the basis for the recommendations listed in the following section of this report.

## **OVERVIEW...**

Although the process of “vetting” has often been correlated to the examination and evaluation of the efficacy and character of political candidates, this capital campaign planning study has provided a most thorough and inspiring vetting of a broad range of parishioners from St. Athanasius Orthodox Church. Catechumens, new members, older members, and founding members were included and ranged from college-aged to those who are retired. As with the first campaign, Counsel was struck by the level of commitment to God and His people. As was also evidenced in our first campaign, Counsel is assured that whatever path St. Athanasius chooses to embark on, it will be one that is illuminated through prayer, counsel, and the grace of the Holy Spirit.

As the Parish launches its third decade, it continues to be a blessing to the people of Nicholasville, Wilmore, Lexington, Berea and beyond by providing a spiritual home for those seeking the life of Christ. The zeal for worship, community and outreach continues to set an example of what it means for a parish to be “a shining hill”. Counsel was particularly encouraged to see and speak with members who, when I first met them, were children and teens becoming active and strong members of the parish as young adults.

Once again, members of St. Athanasius Orthodox Church participated in the study, providing a wide variety of people to offer their time, knowledge, and vision to conduct another capital campaign planning study to retire the mortgage before embarking on a new campaign that would create a larger temple and improve our existing living space. Their participation will help discern the goal and feasibility of a capital campaign to ensure that the parish continues to grow and thrive as it enters the church’s third decade.

**The widely accepted criteria for a successful capital campaign are as follows:**

### ***Favorable Image***

Since its founding, St. Athanasius Orthodox Church has maintained a good image and reputation among the parishioners and the larger community. Even through COVID there weren’t any church splits or outright dissension within the parish. While a handful of members were affected by either the looseness or the strictness of the COVID protocols, a vast majority found the parish to be a spiritual haven and a source of salvation for themselves and their families. The exhibition of hospitality and the desire to reach out to other parishioners and the larger community continued during COVID, (although there were fewer opportunities to do so). At a time when many church communities closed their doors and ministries (many permanently so) Counsel was encouraged to see the faith, vision and creativity to weather the COVID storm. These characteristics continued to nurture members and attract visitors; in fact, quite a few visitors and



inquirers were encouraged to attend due to the faith of the St. Athanasius community to address the needs of members and non-members in any way they could. A majority of those who participated in the study were very thankful for Fr. Justin's leadership, faith, and willingness to create solutions over the past year and a half.

The report explains why people are attracted to St. Athanasius and why, once involved, stay involved. Now that (prayerfully!) the effects of COVID are easing, the face to face worship, fellowship and outreach will continue and grow. Counsel strongly recommends that parish leadership continues to nurture the attributes that make the parish a place of joy as St. Athanasius moves on from challenges experienced through the past two years of COVID. Counsel looks forward toward the next decade and the vision of a new temple and enhanced facilities that will include school rooms, a more efficient fellowship hall, and offices. This will certainly require some creative thinking, but the parish has been shown to be not only be creative and full of faith, but has done so in with the wisdom, counsel and prayer of the church leadership, and indeed, the whole parish.

### ***Compelling Case Statement (the case for support of the project)***

When the parish proposed to build a temple in Nicholasville rather than on the far outskirts of town over ten years ago, it was obviously made with the counsel of the parish community and the Holy Spirit. The proof is in the results: growth in the numbers of members and visitors, and growth in the spiritual maturation of the parish community as a whole. There was certainly a need to move on from the rented facility and that was evidenced by the zeal and financial commitment of those at that time. And even though the complete funding was not fulfilled by the first campaign, enough was secured to allow an advantageous mortgage to assume one.

However, during the course of the current study, only a handful expressed the idea that we might be running out of space; that doesn't seem to be a primary concern for the participants at this point. (That is not to say that within the next five years or more, a larger temple may be required, but it is not a primary focal point at this time). However, when the time has come to begin funding a new temple, the majority of participants felt we should retire the existing mortgage before embarking on a new campaign in five years or so.

While retiring or reducing the mortgage may indeed be beneficial on some level, most felt that there are more important challenges that should be addressed at this time. We will discuss those challenges further below.

### ***Adequate Source of Contributable Dollars***

As with the previous campaign, the current study also revealed the funding limitations of the church's demographics. This is important. Participants in the study eagerly showed that any parish campaign would rate high or very high among each participant's other philanthropic interests. This shows that the financials do not reflect a lack desire or commitment, but instead

reflect current economic realities of the participants.

Therefore, knowing that the potential for pledges to a campaign would be around \$300,000 among participants, it is Counsel's opinion that a campaign goal of \$700,000+ not be undertaken at this time. While those who were not interviewed would certainly add to these numbers, it is believed that none of them would be the type of lead donor(s) that could significantly move toward the \$700,000 mark. This is not to say that God could not provide some type of miracle. We have seen God bring forth funds that we didn't anticipate during the last campaign (i.e., the successful land sale of the property outside the city) and I'm sure it will also happen in the future. But it would be disingenuous to rely on it.

Another dynamic that was in play at the time of the first campaign was a realistic contingency in place if the campaign goal of \$1.3 million could not be achieved: taking on a mortgage that would satisfy what was lacking in the pledge totals. Because the current campaign study is being used to retire the debt, getting a mortgage isn't an option.

Therefore, I recommend that the members of St. Athanasius spend time over the next few weeks exploring ways to address the need for retiring/reducing the debt while not diminishing current programs and ministries. Thoughts regarding these will be listed below.

### ***Strong and Enthusiastic Governing Body***

The priest, deacon, sub-deacons and parish council of St. Athanasius Orthodox Church are strong and enthusiastic about investigating the process of a potential campaign. Of particular note are the numbers of participants who would like to use their time, talent and treasures as they explore various possibilities, even those who do not currently serve in formal leadership position. Counsel continues to be encouraged not only by this commitment as servant-leaders, but also by the depth and knowledge of the faith exhibited by so many of the participants. This will help ensure continued success as the parish moves into its third decade.

### ***Influential Campaign Leadership***

Counsel was certainly impressed by the overall level of financial support and willingness to volunteer for the campaign. However, no one revealed the necessary level of influential, financial leadership that would need to ensure success. While the desire to retire the debt is admirable, the timing of the campaign may not be in the best interest of the parish *as the campaign proposal now stands*.

### ***Sense of Urgency***

Unlike the previous campaign to build the first temple, the sense of urgency that imbued the parish at that time is somewhat lacking. Several reasons were cited in the report: lack of adequate

information for the campaign, concern for pastoral care, the impact of other ministries and missions, and options for the existing mortgage.

While a few of the participants felt that creating larger and better facilities were admirable, a vast majority of them (including those who felt that a larger space would be beneficial) felt that with limited resources, the parish should emphasize and discuss these critical issues:

- 65% of the participants felt that coordination/administrative concerns should be addressed. In doing so, people were not suggesting more hours for a secretary; participants were more interested in additional pastoral staff, whether full-time, part-time or volunteer leaders to direct ministries both within the parish and in the community, and help with the fellowship meal. Most of these will require financial assistance and may be a large investment depending on the staffing.

- 46% cited Fr. Justin's workload specifically in regard to coordination/administrative concerns. As in most churches (or businesses!) that are growing, there comes a time when the numerical growth requires new leaders, yet the growth may not be enough to finance those new leaders. This is a common conundrum. But participants feel that these need to be addressed before focusing solely on raising money to retire the mortgage or to raise another temple. As one participant stated, "*What good does it do to be debt free if we lose Fr. Justin or the ministries that helped us create a new building?*"

Therefore, it behooves Counsel to discuss with the parish council and other leaders to address these issues and concerns. This does not require an either/or situation: retiring the debt versus supporting staff, ministries, and mission. With the advice of the staff, leaders, parishioners with counsel from the Holy Spirit, a way forward may be possible while addressing all those concerns. Counsel is available to help this conversation as you deem fit. I will explore this in the next two segments.

### ***Campaign Timing***

While the idea of retiring the debt over the next five years is compelling, especially with the idea that by doing so, another campaign may launch to erect a new temple and upgrade our existing building, Counsel feels that embarking on a campaign as it is currently described is not in the parish's best interest. That is not to say that some form of campaign may move forward, but it should be a part of a larger campaign to fund the challenges mentioned above. Counsel suggests that instead of embarking on a formal capital campaign, i.e., raising funds for a specific building program, project, or endowment, St. Athanasius could explore what is known as a hybrid-campaign. This five year campaign would raise funding to be used for a variety of projects.

## ***Case Statement***

Counsel feels that the next step in the process would be to address the concerns mentioned in the campaign study and how the parish can move forward, especially in light of a hybrid campaign. The study has shown that between \$300,000 - \$400,000 (or more) would be available for such a campaign. That amount would be \$60,000 - \$80,000 a year over and above weekly tithes and offerings that could be directed to specific resources and/or projects. For instance, one portion may be used to reduce the mortgage debt, another portion may be used to fund additional staff, another may be used to help grow the Berea Mission, etc. Other church communities have utilized such hybrid campaigns successfully and have used a variety of names like The Faith Promise Campaign, The Vision Campaign, and others. If a hybrid campaign is commenced, a paper (the Case Statement) citing the need for support would be created then followed up with regular updates, amendments (if needed), and published successes and milestones.

A number of concrete ideas were suggested by participants during the interview process that may form foundations for a case for support:

### **Regarding Pastoral Staff**

- Explore a young Priest or Deacon as a youth coordinator (similar to what St. Justin's did in Jacksonville, FL), ministry coordinator, or outreach pastor.
- Explore a Priest, Deacon or Sub-Deacon who is a part-time "tentmaker" who may take on similar roles above.
- Entice a retired priest to relocate to Nicholasville and serve in the parish in those capacities.

### **Regarding Leaders in Parish Ministries:**

- Encourage potential lay leaders to enroll and subsidize programs that will enhance their faith, i.e., St. Stephen's Course at the Antiochian House of Studies
- Supplement local Orthodox training while students participate in leadership classes at Asbury College or Seminary.
- Enroll retirees to help on specific projects or ministries who have already lived through those experiences.

### **Regarding the Berea Mission:**

The mission in and of itself may become a solution to increased participation in the Berea (or any other) Mission. As people move to new missions, space will be made for people coming into St. Athanasius. Of course, this will require finances until the mission is self-sustaining, that it is

why parishioners should be informed about other sources of funding from the national church and the diocese.

### **Regarding the Parish Meal:**

- Look into streamlining the whole process; instead of each person trying to create a dish for the meal, create a menu of dishes for each week to use throughout the year. One week it may be black bean chili, the next a hearty soup, next a stew, etc. Since everyone on the team creates the same recipe entrée, providing meals for each Sunday will be much easier. Team members who are unable to create an entree (i.e., college students) could be tasked to bring bread and butter, or prepared desserts.

### **Regarding the Mortgage:**

- The pastoral leaders and the parish council should seek advice from parish members who are astute in regard to mortgage and banking to evaluate other potential options. As one participant mentioned, it may not be in our best interest to completely retire the debt at this time.

- A campaign to retire or reduce the debt include must include conversations on how to do so without impacting our pastoral staff, ministries, and missions.

- If a campaign, whether traditional or hybrid, does not move forward at this time, what is the plan to financially address pastoral care, ministries and missions.

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## **FINAL THOUGHTS**

While Counsel does not recommend that St. Athanasius launch a formal campaign to retire the debt in the very near future, Counsel is convinced that this the concerns revealed in the Report be addressed as the church grows and expands. Counsel recommends conducting a series of discussions to address the current future challenges. While the numbers within the study suggested that a \$700,000+ campaign was time not feasible at this time, \$300,000 to \$400,000 might be realized just by the report's participants. That amount would increase as other members of St. Athanasius' and friends of the parish commit to the project. This is wonderful news and speaks to the faith and vision of the community. Counsel believes this to be an opportune time to

create a hybrid campaign. What is required now is to pray and seek wisdom as to how this campaign or other instrument should proceed. Counsel, as always, will be glad to participate, whether live, through zoom, or via email as needed. If a hybrid campaign is chosen, Counsel will help create a Case Statement, pledge cards, and other facets to help assure success.

To sum up, Counsel is persuaded that the Holy Spirit will speak as the parish moves forward. I believe this because over the past decade I've seen the faith, commitment, prayer, joy, community and the love of worship that embodies St. Athanasius, and I have every reason to believe you will continue to do so in the upcoming decades. These are, indeed, exciting times!