

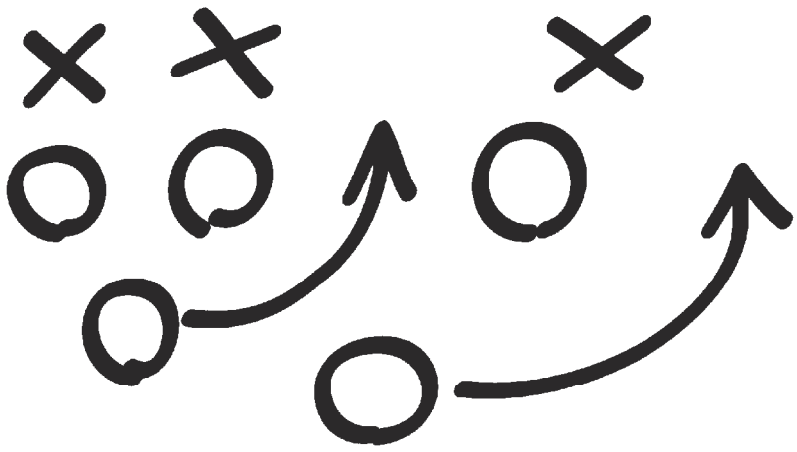
# Capital Campaign Playbook



A Church Consultant's Gameplan

**GREG GIBBS**

Foreword By Will Mancini



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For Rocky Miskelly, who believed in  
God's redeeming plan for me.

For Mom and Dad, Lew and Sheron Gibbs, who taught  
me to love the church and serve it out of gratitude.

For Andrea, who has been my inspiration  
for virtually everything that matters.



*“But me—who am I, and who are these my people, that we should presume to be giving something to you? Everything comes from you; all we’re doing is giving back what we’ve been given from your generous hand. As far as you’re concerned, we’re homeless, shiftless wanderers like our ancestors, our lives mere shadows, hardly anything to us. GOD, our God, all these materials—these piles of stuff for building a house of worship for you, honoring your Holy Name—it all came from you! It was all yours in the first place!”*

1 Chronicles 29:14–16 (MSG)



# Welcome!

This guide is intended to help leadership teams at churches who are considering a capital campaign. My aim is to encourage those new to capital campaigns and experienced leaders as well. I am optimistic that you can design a campaign to be life-giving and powerful! This playbook outlines critical questions to ask and allows for a “workspace” to jot notes and get ready for the exciting times ahead!

This is called a playbook because it contains much of what consultants use to help church leaders through a capital campaign. Combined, my colleagues and I have helped conduct hundreds of campaigns over the years. I have assembled a time-tested series of elements and features that have been successfully used in these campaigns for decades. This is a ship’s log of our collective journey with churches across the theological and geographic landscape.

As a twenty-year consultant who earns a living coaching church leaders, many might ask if I am running the risk of losing opportunities to consult by disclosing my trade secrets in this manual. Perhaps I am. But I believe as leaders use this manual as a diagnostic tool, they will recognize the difference between simple and easy.

While church capital campaigns can seem rather boilerplate on the surface, the particulars of each campaign can vary widely. This



playbook is meant to provide discussion starters, not discussion “enders,” by getting all of the basic stuff on the table right away. It is written as a robust insider’s guide but will not replace the value of a strategic outsider.

What I have written on these pages is a culmination of listening to and learning from friends from hundreds of churches, colleagues from Cargill Associates and Kensington Church, and mostly in collaboration with some of the finest consultants I have known—the team at Auxano.

May God bless you and your church!

Greg Gibbs

Lead Navigator, Auxano

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# Foreword

While there are many kinds of experts, most fit into one of two categories. The first kind of expert is the smart person that you don't really enjoy being around. Their fine-tuned knowledge, however valuable, is overshadowed by either the impersonal way they deliver their intelligence or by their lack of passion for the subject. The second kind of expert is the person who loves to serve with their insight. These kinds of people are joyful, generous, and life-giving. They transcend the transactional to become trustworthy guides who are delightful to follow.

Greg Gibbs is a wonderful model of the latter kind of expert.

As the leader of Auxano's generosity and capital campaign team, Greg is one of the finest consultants I've had the privilege to know. He loves Jesus and serves the church as the bride of Christ. His heart for God is paired with a razor-sharp mind and super-savvy people skills.

With the book you now hold, Greg has done something unprecedented. Ever since the late 1960s, consultants have preyed on the local church's lack of specialized knowledge in the areas of fundraising. At no time has one of these consultants dared to deliver the essence of their expertise in written form. Of course books have

been penned, but not like this one. This book is a carefully curated treasure chest. Each chapter contains twenty-four-karat wisdom and solid gold nuggets to fill your leadership pockets. Greg has been panning for a long time, sifting through all of the silt and dirt and grit in stream after stream for three decades.

The call to lead God's people is not for the faint of heart. There will always be challenges. But when it comes to increasing the generosity of your people, you don't need to be left wondering or wondering. Take hold of the principles and practices from a trustworthy guide. Enjoy the journey. Use this book to lead God's people into a life of generosity that is one of the greatest secrets of our God-likeness. Use this book to rally people to God's dreams that unleash the kingdom on Earth as it is in heaven.

Will Mancini

# Introduction

I can make this introduction short by revealing my attitude right up front:

**I love capital campaigns.**

About twenty years ago, my friend Rev. Rocky Miskelly introduced me to the world of Church Capital Campaigns. Not only had I never been through one, but I found myself unsteady at the helm—a young, recently promoted senior pastor of a ten-year-old church plant building its first building ever.

Rocky was consulting with Cargill Associates, one of the long-standing firms in our country formed in 1976. I would eventually learn about Dr. Robert Cargill and his family and the many churches and universities that the family and company have helped throughout the decades. I would gain a profound respect for them. I remember hearing some dramatic tale (like only Southerners can tell) of how RSI and Cargill started about the same time back in the wonder years. I have forgotten the details and that is not important. But my testimony about this work emanates out of the amazing experience our church in Kalamazoo, Michigan, had as a result of Rocky's work with us.

If you ever hear me talk about it in person, it goes something like this:

*I knew we needed to raise money for the church, and I had heard that consultants were necessary to accomplish this. In my naivety (and arrogance) as a very young pastor, I thought, “**Let’s let this guy come in and do what he must, so I can get back to the real work of ministry.**” But during the course of the months he was with us, our congregation grew spiritually in unexpected ways. At least they were unexpected to me. People’s faith in God grew. Married couples had unprecedented conversations about their lives and the purpose of their resources. Andrea and I made a commitment to the church that was way beyond our own ability to fulfill. And you could have probably guessed that God, through extraordinary circumstances, enabled us to fulfill that pledge. We learned that the most emotional, vulnerable, underdeveloped part of most of many people’s walk as a disciple of Jesus was in regard to their money (well, God’s money). And when we studied how much Jesus was obsessed with talking about it, we realized that doing a good campaign around generosity and “above-and-beyond” giving was the real work of ministry.*

Through a series of circumstances, I later joined the Cargill team full-time and Rocky took me under his wing. Before I knew it, I was consulting on a dozen campaigns each year. Eventually I joined the staff of Kensington Church, my home church just outside of Detroit, where I, along with a team, led two separate campaigns

targeting \$25M each for buildings, church planting, and global missions through Kensington.

During the economic downturn of 2008–2010, Detroit was ground zero for economic stress. It was in that context that my friend Alex Calder and I learned some difficult lessons about how to pastor people through the hard times when it came to the application of faith to financial resources.

I joined the team at Auxano after conducting more than one hundred campaigns while continuing on staff at Kensington for the next ten years. Auxano, a consulting firm founded by author and consulting genius Will Mancini, is a kind of SEAL team of church coaches. In their early days, the team was primarily two guys—Will Mancini and Jim Randall—who worked to perfect the process of helping churches discover organizational clarity.

The genesis of this consulting platform began in Will's creative mind and was eventually chronicled in his book *Church Unique* (published in 2008). As an organization, Auxano deploys consultants called "Navigators" across the country. They work with churches of all shapes and sizes in applying Mancini's insistence on "stunning clarity" to the process of discipleship in mission-minded churches.

The Resourcing Division of Auxano takes the engine of clarity (our company DNA) and applies it to capital fundraising and generosity development for churches. The following chapters are the tools and techniques that I have learned over the years and now practice with my colleagues at Auxano.

I believe that this is a fairly comprehensive manual. The church capital campaign industry has been perfecting a set of practices over the decades with only slight variations in style and substance from one consulting company to the next. I say this with great respect as I personally know many of the stellar men and women who do this work.



I am intending to give the trade secrets away because I believe doing so will help churches get a head start on the creation and execution of a successful capital campaign. And like many other pastors and consultants that I have come to know, this is the way we are serving God on this earth—helping His church be the best it can be by sharing the tools we have developed and refined over the years.

The following areas of importance are each framed in a “set of three”—three questions or three ideas or three concepts. It is meant to be a quick reference guide. Please use these for discussion and deliberation. Time spent with this playbook will help get your team ready for raising capital or “over-and-above” giving.

I firmly believe that great consultants, coaches, and navigators are still needed in the church in America. Perhaps more than ever before. But if the contents of this book accelerate knowledge and expertise in this area—the capital funding of the dreams of the church—then I will be satisfied. All of the flights, rental cars, and airport meals will have been worth it.

Oh, and thanks, Rocky, for believing that God could use me for His church when I wasn't totally convinced of that. Everyone needs a Rocky.

## *Chapter One*

# Three Waves of Process

When people in the church mention a capital campaign, they are almost always thinking about one phase of it—the public phase. People remember or focus on that part because it is the part where church leaders are talking, preaching, praying, meeting, and conversing about the projects with the whole congregation. But there are actually multiple waves and a lot of work before we ever go public with asking for over-and-above financial contributions.

In the pre-campaign waves, we are establishing our readiness as a church to enter a campaign. There is a good chance that if you are reading this, you are in that phase. At a very basic level, the inquiry starts with “How much does our project cost, and will our people give that much?”

Beyond the basic question is the idea that the preparation phase is as important (or more important) than the public phase. From due diligence to establishing appropriate targets to assessing congregational buy-in, this phase is where the greatest victories and mishaps may actually occur.

Then, we realize there is still another level. For churches that want to conduct a discipleship-based campaign, we discover an extraordinary opportunity. The campaign can be a massive greenhouse for growing people's commitment to Christ and their understanding of a life that is "true life" (1 Tim. 6:17–19).

This is why, in part, this book has been assembled. Because when there is thoughtfulness in regard to shaping the campaign, it can be an amazing experience filled with celebration and excitement instead of a dull but necessary endeavor dreaded by church leaders. The challenge is to aim for a best-case scenario: that faith in God and commitment to the church grow in a special and intense way.

To meet this challenge, church leaders should pay attention to the process in three waves:

**Discover**

**Design**

**Disciple**

## Discover

I have the privilege and honor of coaching the senior leadership of churches under the umbrella of Auxano, a company that is the category-leader in regard to Vision Clarity. The coaches (called Auxano Navigators) don't know where else to start but with questions about clarity. Being clear is uber-critical in any organization—especially in the church.

And if things have been fuzzy for a while about a church, its mission, its effectiveness, its future, its focus, or anything else, a capital campaign will expose that lack of clarity. There is nothing that exposes our organizational soft spots like a campaign.

Members of the church will put up with being a bit in the dark regarding church leadership and their intentions most of the time.

We love our church and for good reasons. But when church leaders start to say things like, “Let’s pray about giving the largest gift we’ve ever given” or “Please consider supporting the church with a financial gift beyond your current support,” all of a sudden people care deeply about clarity.

They are asking themselves, “Why would I give even more to my church? What is so important that I should be praying audacious prayers about my increased giving? I’m not even sure I understand what’s going on anyway.”

The discovery process in a campaign starts with clarity. It requires uncovering (or being honest about) how much clarity exists in our congregation. Do people know the answers to the five irreducible questions of clarity: What? Why? How? When? and Where? In other words, before we start measuring for curtains in the new fellowship hall, we need to find out if people know where we are headed. Some churches need a bit of a clarity “time-out.”

### Five Irreducible Questions of Leadership






Frame Component	Icon	Irreducible Question of Leadership	Missional Reorientation
Mission		What are we doing?	<sup>m</sup> <i>Mandate</i>
Values		Why are we doing it?	<sup>m</sup> <i>Motives</i>
Strategy		How are we doing it?	<sup>m</sup> <i>Map</i>
Measures		When are we successful?	<sup>m</sup> <i>Marks</i>
Vision Proper		Where is God taking us?	<sup>m</sup> <i>Mountaintop + Milestones</i>

Figure 1.1

NOTE: For more help with this, read Will Mancini's landmark work *Church Unique*, which outlines how churches can articulate their identity and direction with stunning clarity.

Before moving forward with a capital campaign, church leaders may need a time of refining and honing their vision and mission. Then they may need to clarify and communicate this to the congregation. Then, and only then, will the congregation be ready to hear about projects that support that clear idea of a God-inspired future together.

I recently worked with a church in Oklahoma who originally hired me to help them conduct a capital campaign. As we started to ask the Five Irreducible Questions, it became evident that capital improvements were the least of their concerns. With a senior pastor in succession, an aging congregation, a struggling second campus, and no clear understanding of the next steps for their organizational health, there was more murkiness than would allow for an effective campaign. We took a needed time-out from campaign talk and began to chip away at their real need for organizational clarity and a focused plan for the future of their ministry.

Another important aspect that is critical to understand is that many of our churches are still made up of people from several generations, including the Builder generation, of whom many are financially supportive of the church. Barna and other researchers have revealed the differences in generational views of "building buildings" as well as giving behavior in general. The over-representation of the Builder generation in the positions of leadership and influence often leads the church to equate progress with building construction.

At the same time, so many churches are wondering why they aren't connecting with the younger generations, Generation X and Millennial leaders. There are books written about this (this is not one of them), and this is an important pursuit when it comes to

understanding the best direction for the church. Knowing the language and perspective of the generations in your church is critical. Some readers may need to put this book down and not consider pursuing a capital campaign until there is a better understanding of these dynamics and how they will play out at their church.

Church leaders should have solid and clear responses to questions like:

*What is our vision for the future?*

*Who are we and who are we becoming through  
God's help?*

*How will the projects being considered in this cam-  
paign help get us to that destination?*

When we have a sense of how much vision “equity” we have with the people, we will know better how to communicate the importance of the capital projects in light of that.

### **Reality Check**

The other part of the discovery process is assessing our reality. It is a look at our current data—the indicators of congregational engagement, involvement, and financial support.

Why? *Because the greatest predictor of future behavior is past behavior.* We operate in faith and optimism, but we also have an eye on the numbers and ground ourselves in reality. It is recommended that church leaders assess both *Capacity* and *Inclination*.

Looking at capacity answers the most popular question a consultant hears when it comes to campaigns: *How much can our church raise?* And the idea of inclination delves into the more difficult question to answer: *What will our congregation actually give?*

## *Capacity*

In the capital campaign world, the church's general budget revenue is used as a top-level predictive tool regarding the church's capacity. In other words, if we are simply making an educated guess or general estimate, we start with the church's annual operating revenue and then multiply that by some factor: 1 times that number, or 1.5 times, 2 times, or 3 times.

Prior to the downturn of 2008–2010, the church capital campaign world was somewhat straightforward and fairly predictable:

$$\begin{aligned}\text{Church Operating Budget} &= X \\ \text{Capital Gifts Over Three Years} &= 2 \text{ or } 3 \text{ times } X\end{aligned}$$

When I was trained almost twenty years ago, the major capital campaign consulting companies for churches in America were groups like RSI, Cargill (for whom I worked in the early 2000s), Injoy, and a few others. And with rare exceptions, these companies would regularly lead churches to campaigns that resulted in double or triple the annual income in capital gifts over a three-year period.

Things have changed—the dynamics in play before 2008 are very different than those today. The two most common stats are no longer the norm. Back in the day, most campaigns garnered at least two times general income and most campaigns were over a three-year collection period. It was clockwork. Like the Chicago Cubs never getting to the World Series. Well, that was then and this is now. These dynamics have shifted considerably. And just look at those Cubs!

## **Current Trend**

**Churches are bold if they estimate that multi-year pledges will amount to anything larger than 1.5 times the church's income.**

## *Inclination*

Perhaps even more important than a congregation's capacity to give is their collective inclination to do so. What this means is that a person or congregation may have a capacity to give X, but there is another factor in play: What are they likely to give to the project at hand? Not what could they give but what are they *likely to give*?

Some projects tend to motivate people to give to their full capacity. Some may even cause people to stretch beyond what is comfortable as an act of faith.

Others, not so much.

Much of this is connected with the emotional tie-in and buy-in associated with varying aspects of church life. A part of it is connected with something tangible that we "get to see" when the money has been invested. This is why *Debt* or *Dirt* campaigns are the hardest to explain and connect with vision as well as people's hearts. When we are retiring a mortgage or securing land, these are very important strategies for church life, but are just more difficult to create emotional support for. And this is why *New Church Building* or *Sanctuary Renovation* can garner lots of passion. It affects everybody in significant ways and is tied into our spiritual practices and places.



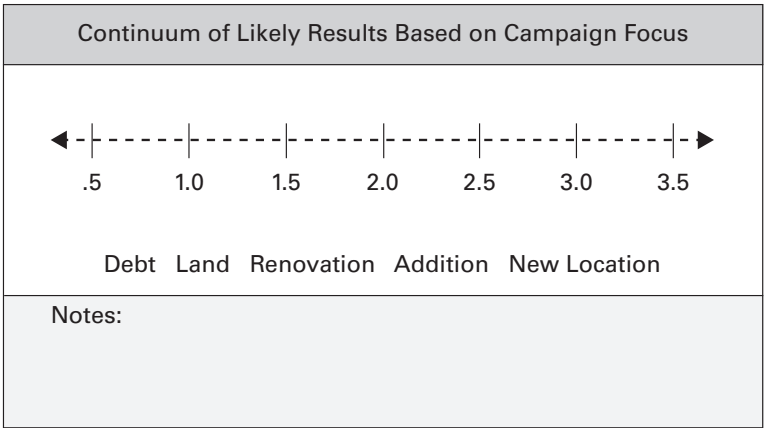


Figure 1.2

Where would you rank your individual components or projects on a 1 to 10 scale, with 1 being “very difficult to gain emotional buy-in” and 10 being “easy to gain buy-in, people will be ecstatic”?

Project Buy-in Assessment										
	LOW BUY-IN					HIGH BUY-IN				
	1	2	3	4	5	6	7	8	9	10
Project 1										
Project 2										
Project 3										
Project 4										

Figure 1.3

My friend Rocky Miskelly is a passionate, lifelong football fan of the University of Mississippi. He would explain the importance of understanding congregational buy-in by using football fans as an analogy as he talked about Ole Miss.

He describes the difference between a “fan” and a “supporter” of the football team. A fan likes to cheer for the team, and a supporter writes a check to fund the team. Just like a great college football program, you need both fans and supporters in the church. But it would be helpful to know who is in what classification before a major project is underway.

Unfortunately, we have a hard time in church capital campaigns figuring out whether people will be fans of a capital project or supporters. And if they are supporters, to what degree will they be supportive? What is their sense of buy-in? Can we identify the biggest challenges we will face when asking people to fund this particular initiative?

**Jot down some of those challenges here:**

NOTE: The top-notch consulting firms will have a formal assessment tool that allows for a “test” of the congregation’s level of support during the planning phase so that church leaders don’t get surprised during the public phase (when it is often too late to make adjustments).

The group at Aly Sterling Philanthropy offers the benefits of a formal study:

- Do I have a large enough donor base to support my goal?
- Does the project make sense and offer a concrete solution?
- Do I have the support of leadership?
- How much should we expect to raise?

- Is now the right time to host a capital campaign?
- What questions do potential donors have about the project?
- Who are potential major gift prospects/campaign leaders?

### *Capacity versus Project Cost*

I continue to be befuddled by churches that create wish lists and dream projects and spend time and money designing something they have no business designing. Not because churches shouldn't dream or be creative, but because without some grounding in financial reality, it can burn up energy unnecessarily.

Some churches really slow down progress by having to retreat from plans because they are way beyond the scope of what can be raised. Should we not have some sense of what our church is likely to give (and whether or not we are willing to borrow the rest) before we start designing with no financial parameters? If I were shopping for a house, a car, or budgeting for renovation in my personal life, I would start with the answer to the question, "How much can I afford to spend?" or "Am I willing to borrow money to renovate my kitchen?" Churches seem to get this in reverse order. I have met with more than a few churches that have an estimated cost for their project that is four or five times their annual budget or more.

When I discover this, I hope and pray that the leadership has not been casting vision or creating excitement about a project that they will not be able to afford. If they have been talking it up, we are immediately thrown into a back-peddling exercise before we can start a fund-raising campaign. Or the church will put itself into a position of borrowing more than they ever imagined. This undesirable outcome is the clear result of not gathering all of the necessary information to lead well.

## The 4 Advisors: Architect, Builder, Banker, and Fundraising Expert

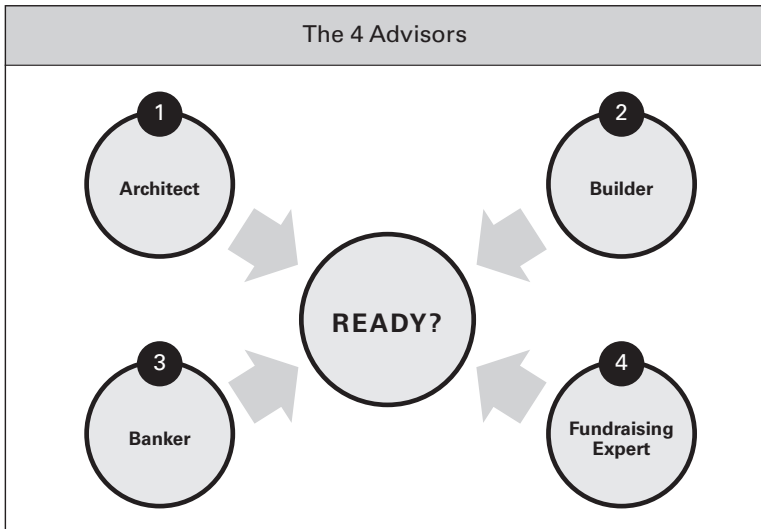


Figure 1.4

Understanding readiness is like a four-legged table. Without each of these professional advisors weighing in, there may be a missing and critical component of leading the church well.

- **Architects can answer,** “How will we design something to meet our needs primarily and our wants secondarily?”
- **Builders can answer,** “When can we start, how long will it take, and what will it likely cost?”
- **Bankers can answer,** “What will a financial institution lend us for this project should we choose to borrow either short- or long-term?”

- **Fundraising experts can answer,** “How much will the congregation likely give to a project like this, and what is the best approach to engaging and motivating people?”

**People often ask:** “Don’t you have to design the project before you know the cost and whether or not it matches the congregation’s willingness to give?”

**Answer:** Not really. No matter what you design, it is against the odds that your congregation will defy the norm and go much beyond three times giving even if we were in the pre–2008 economy. So that becomes the top border (or highest level possible) if it were a cash-only project. As we mentioned earlier, **starting with 1.5 times income** (in a three-year campaign) **plus whatever lending the church is willing to service is a more fruitful conversation.**

*Questions to Consider*

Do we have the most helpful and necessary information and feedback from the four advisors mentioned above? What do we know so far?

The 4 Advisors Assessment	
___ Architect	
___ Builder	
___ Banker	
___ Fundraising Expert	

Figure 1.5

Are we willing to borrow money for our projects? Have we considered the gap between our project cost and our likely giving amount?

*(Estimate the project cost and subtract the likely giving amount from that below.)*

Project Cost Equation	
Project Cost	_____
Likely Capital Receipts	— _____
Difference via Mortgage	= _____

Figure 1.6

Have we estimated the cash flow projection and how that may impact borrowing, start and end times, and more? In other words, when the congregation pledges X, it comes in over time—sometimes two or three years—and not in a lump sum.

Another frequently asked question is, “How much of the pledged amount can we expect to be fulfilled?” This is another statistic that doesn’t seem to be going in the right direction. When I first started coaching campaigns two decades ago, we would regularly see 90–95 percent of pledges fulfilled. Much of the industry talk these days is much more conservative, and churches are encouraged to budget for 80–85 percent of total pledges unless a robust follow-up process is executed.

Chapter 17 highlights the effort that can be made in the post-pledge era of the campaign as a follow-up or follow-through on campaign promises and pledges. One way or the other, it is

recommended that a cash flow projection be made to help with financial strategy and project completion time lines.

3-Year Campaign Estimates (conservative)		
Year 1 Capital Giving	Year 2 Capital Giving	Year 3 Capital Giving
\$ _____	\$ _____	\$ _____
(30% of pledged)	(29% of pledged)	(28% of pledged)

Figure 1.7

2-Year Campaign Estimates (conservative)	
Year 1 Capital Giving	Year 2 Capital Giving
\$ _____	\$ _____
(45% of pledged)	(40% of pledged)

Figure 1.8

*Planning Tool*

Have we taken into consideration the impact the years of capital campaign giving may have on the general budget? Are we willing to plan to slow our expectations of year over year increase and budget conservatively?

## Design

The due diligence required in the Discover phase is crucial. Once that information is compiled, we are ready to begin designing the campaign.

Some people bristle at the word *campaign*, connecting it with the seamy side of political elections. But the word simply means to “work in an organized and active way toward a goal.” And the church is an institution with so many worthy goals! So, what is the “organized way” we work toward achieving our goal?

### *Timing of the Campaign*

It isn’t a difficult decision, but it does require some thought. We need to decide whether the public phase of the campaign will happen between Labor Day and Christmas or between New Year’s Day and Easter. It is almost that simple.

The following diagram models the two quarters ahead of the public phase necessary to do a best practice campaign. Time is needed for ramp-up, planning, and training.

The following diagram uses the Discover, Design, Disciple waves, and shows the two most often utilized times of the church calendar for the public phase:

Church Calendar for the Public Phase		
Labor Day – Christmas		New Year’s – Easter
DISCOVER	OR	DISCIPLE
(Readiness)		
	DESIGN	
	(Silent Phase)	(Public Phase)
Q2 -----	-----> Q3 -----	-----> Q4 -----
Q3 -----	-----> Q4 -----	-----> Q1 -----

Figure 1.9



Since the campaign needs to capture the attention and focus of the entire church, the question is: *When can we clear the calendar to focus on the campaign?*

Summer is almost never a good time. I say “almost” because of the rare exception of one client church I coached whose attendance increased during the summer (it was a resort town). But for most churches, summer time is more like a ghost town.

### *Length of the Collection Period*

As was mentioned earlier, back in the day this really wasn’t a discussion. If there was any debate at all it was about the difference between a three-year collection period and a five-year period. Many non-church entities (universities, nonprofits, etc.) would do a five-year pledge period.

These days, the options seem to be one, two, or three years.

Three-year campaigns are still in the majority but are quickly being outrun by two-year campaigns as the ever-increasing collection period of choice. The reason many churches are decreasing their pledge collection period is mostly speculative and anecdotal. However, the data points to drive the research are building steadily.

I met with a church staff in San Jose, California, a year ago, and as a man in my late forties it became quickly evident that I was the oldest guy in the room by far. I met their young CFO at a Pushpay event I was speaking at in Redmond, Washington, and he invited me to come visit with them about capital campaign consultancy.

They explained their upcoming gala was an event that they were planning to receive gifts and pledges (mostly gifts). In that Northern California context, it was a black-tie dinner and vision presentation, and people would be expected to bring checks and commitments. It was basically a one-year run-up to a one-day campaign. I was a fish out of water. Like an old dog befuddled by

new tricks, I have since had to unseat my bias toward the three-year campaign plan I was trained to coach.

The more I meet young leaders in young congregations, this seems to be the tendency. There is so much transience in the congregation—young people moving around, building careers, “moving on,” etc.—that talking about three years from now seems like an eternity.

Ben Stroup gives some thoughtful consideration to this topic when he writes, “The challenge of every campaign is getting enough people to buy-in, commit, give, and fulfill on their initial financial pledge throughout the entire effort to ensure initial goals are met. As churches struggle to find a new tempo in the dance with the donor, the short-term capital campaign approach seems to be a viable option for those looking to make an immediate impact and clearly communicate the ministry value of every dollar raised.”<sup>1</sup>

Stroup cites 5 reasons to consider a shorter time period:

1. The *insecurity* that seems to drive people financially these days makes three years feel like a very *long time* (especially younger people).
2. It is difficult to maintain people’s *focus* with competition from other nonprofits over a long period of time.
3. The *proximity* of time the church plans to use the funds is important (how quickly are they needed?).
4. Churches need to demonstrate a *return* on investment sooner rather than later (it is hard to keep giving consistently when people see or experience no fruit from their generosity)
5. The *effectiveness* of an eighteen-month to two-year collection period is almost the same

in total dollars as the traditional three-year period (though this is still a small sample group overall).<sup>2</sup>

Dr. Clint Grider, one of Auxano's principals and a philanthropic expert, reminds us that a discipleship-based campaign framework can allow for a very different kind of process that may take longer:

A relational process will lead people to grow in their focus, confidence, and generosity during the collection period and beyond. Sometimes church leaders don't understand the critical importance of deeper, more purposeful engagement of givers after commitments are made. In some cases, this may make a longer commitment period more effective in cultivating discipleship.<sup>3</sup>

A popular format right now is the One Fund, which offers churches an alternative to the traditional capital campaign. It is meant to develop generosity in all givers as they increase their giving and is collected into one fund (thus the name) instead of into multiple funds (general, capital, missions, etc.). The idea is that the church leadership can parcel off or budget the necessary funds to do capital projects—particularly ones that aren't as directly vision-based (think "roof repair").

There are mixed reviews in the early years of the One Fund approach. Some appreciate the simplicity and directness of not having multiple asks for the congregation. The One Fund helps focus churches toward the regular nurturing of people toward a life of generosity instead of the high emphasis only during a special campaign.

Other leaders have reported that, in reality, the approach is merely a semantic difference to what churches have aimed to do

for years. In essence, it becomes a series of one-year generosity campaigns, no matter what we call it. In the end, it can look quite similar to what many mainline churches have done for a long time via their annual stewardship campaigns. This is because early experiences of a few hundred churches have shown that this methodology ultimately requires a kind of special “campaigning” every year anyway. In essence, it is a good way to shepherd generosity but should not be advertised as “never having to run a campaign again.”

**NOTE OF ADVICE:** For multi-year campaigns, it is important to pay attention to two factors that likely increase giving. One is how many Decembers fall in the collection window, because December is a big giving month. Another is how many calendar years are touched by the collection window. You can have an eighteen-month to two-year campaign that traverses three tax years depending on when it starts and ends. This is a great advantage to contributors who are tax aware and tax deduction savvy. (Of course, charitable contribution deductions in the United States are constantly being threatened, so who knows what condition they are in by the time you are reading this paragraph.)

For another perspective on this, consider thoughts from Chuck Klein on this discussion about length of campaign:<sup>4</sup>

**1. New people.** As we have become a more transient society, it is probable that many of your consistent attendees—and financial contributors—were not with you three years ago. Study your records; how much turnover in membership and attendance have you experienced in that time frame? More telltale, how many of your new members can articulate vision that you presented over two years ago?

**2. Unsettled economy.** Today’s economic climate can make it difficult for people to see short-term, much less commit long-term. Such uncertainty results in people giving conservatively. Others are unable to give now but often will when approached at a later—but

sooner!—time under different personal circumstances. An extra twelve months unnecessarily delays their support and participation.

**3. Generational perspectives.** Today's young adults hesitate to make a three-year pledge, yet will give to causes they deem just and admirable. This is particularly true of projects that are well-planned and clearly articulated. Similarly, seniors on a fixed income can be reluctant to fill out a commitment card, viewing it more as a promissory note than promise to fulfill. Many will give to a short-term or make a one-time large gift but never fill out a pledge card.

**4. Campaign fatigue.** Leaders wary of “burning out” their people would do well to shorten the program. Some church leaders choose a three-year term to keep a longer period between campaigns, but this adversely impacts the momentum for many givers. Back-to-back one-year campaigns can cause even quicker burnout.

Such an approach carries less intensity with each passing year, and we've never seen successive one-year programs yield the fruit of singular, longer campaigns.

Brian Kluth, senior pastor and long-time generosity consultant, reminds us that one-year campaigns can be appropriate if the size of the capital need is less than half of the church's annual budget.

### *Questions to Consider*

Have we discussed both the time of year we are inclined to hold the public phase of the campaign? What month and year are we anticipating the collection of pledges? (\_\_\_/\_\_\_)

Does our church (particularly staff) have the appetite to “clear the calendar” so that the capital campaign can be emphasized? In what ministry area will we struggle most to suspend our normal flow of activity?

List the biggest challenges to focusing on the campaign based on the time of year we anticipate conducting the public phase:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Have we considered the pros and cons of shorter rather than longer campaigns?

Take some time for a quick evaluation of each:

Risk – Benefit		
	RISK	BENEFIT
1-Year		
2-Year		
3-Year		

Figure 1.10

### *Shaping the Narrative*

Making the “Case for Support” is an essential part of campaign design. This is the story to be told about what is happening at the church that is compelling us to ask for additional financial support from its members. We are “making the case.” This represents what the business world would call a proposal or academia would call a white paper.

**Key Principle:** Until we have agreement at the top level of leadership about our Case for Support, we cannot start communicating widely or it will breed confusion or backpedaling.

The common phrase “singing from the same song sheet” applies here for sure. Best practice campaigns have a clear case and ask leadership to “sing” from it so that the people of the church aren’t hearing different things depending on whom they ask.

One of the most helpful Auxano tools for achieving clarity through our case for support narrative is a repurposing of Mancini’s Five Irreducible Questions. It becomes an outline to help in the initial draft. The questions are listed here in a reshaped manner for brainstorming the church’s Case for Support:

**What?** What are we doing or what project or projects demand us to ask for additional funding? Describe the project, its cost (or estimated cost), and “show” if a rendering, plan, or picture could help with clarity.

NOTES and IDEAS:

**Why?** Why are we pursuing this and why now? Are there connections with our long-term vision as a church that drive us to consider this campaign? Is there a goal or deeply held value that would cause the urgency around this campaign?

NOTES and IDEAS:

**How?** How do we propose to accomplish this in terms of campaign timing and how will we engage our people? Describe the plan for engaging people and the collection period process and length.

NOTES and IDEAS:

**When?** When do we know we have been successful both financially and in other ways? Is there an element of discipleship that will take people to a new level of engagement with God and His church? How does increased generosity represent a spiritual success (in terms of devotion to God) beyond meeting the funding need?

NOTES and IDEAS:

**Where?** As we look to the future, is this campaign representing where God seems to be taking us? Is there a trajectory that follows an if/then statement like “If we are able to complete this, then we can see God using it to bring about \_\_\_\_?” Describe the desired future of the church that we can see with eyes of faith. What dream does this fulfill?

NOTES and IDEAS:



## *Communicating through Concentric Circles*

Whether we call this Concentric Circles of Communication or Cascading Communication, the idea here is that the most effective way to breed ownership of any idea is a strategic “rollout.” This requires describing the organization of the church in categories from the inside-out or the top-down and then following this as a pattern of seeking feedback and ownership.

For example, an organization outside the church may use an organization chart. The president would communicate first to vice-presidents, and then to managers, then assistant managers and then to employees. The key to this is that each “level” has the opportunity to ask questions and weigh in, both increasing ownership and refining the messaging itself.

In the case of churches, many have either an official or unofficial sense of rings of involvement. Rick Warren of Saddleback Church popularized the Core, Committed, Congregation, Crowd, and Community to describe this:

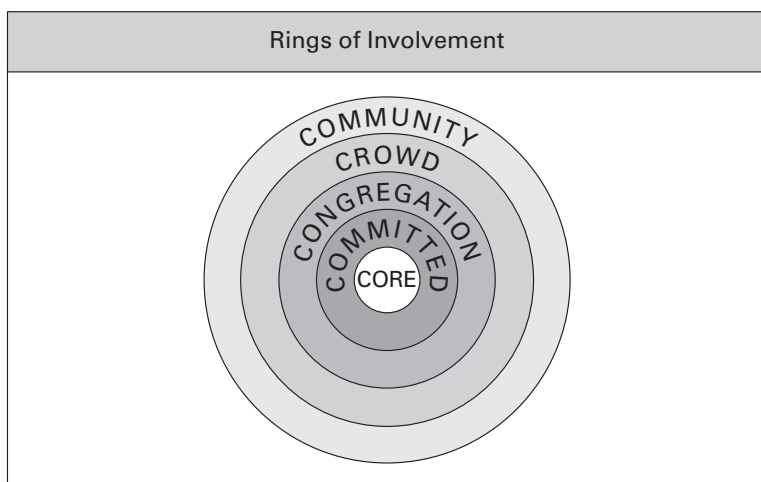


Figure 1.11

But every church likely has a pretty solid understanding of these layers or “rings” in their context.

Here are a few examples:

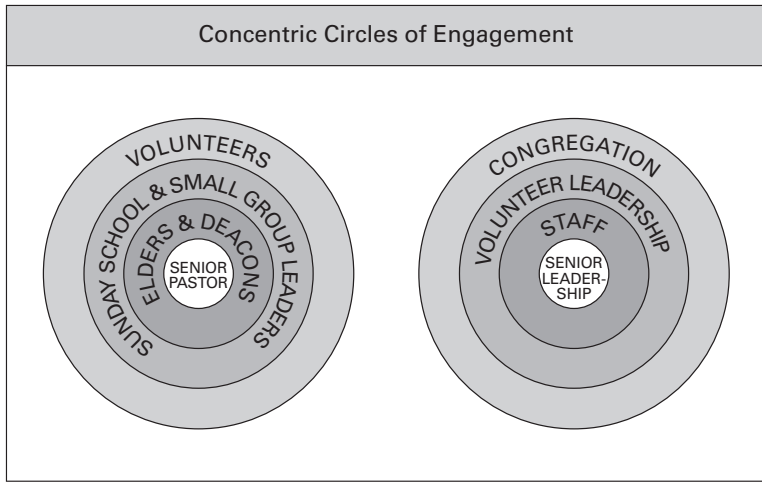


Figure 1.12

What are your layers or concentric circles of engagement?

List them here with the regularity or pace of their meeting rhythm:

Group

Meeting (weekly, monthly, other?)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

Use this graphic (or create your own) to sketch out a series of concentric circles that represent the rollout of the campaign idea at your church.

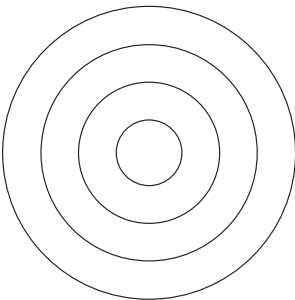
Concentric Circles of Engagement Worksheet
<p>What are your layers of “concentric circles” of engagement?</p> 

Figure 1.13

### *More Questions to Consider*

Do we have a regular pattern of meeting with or communicating with the people in the “rings” of our communication circle?

Whether through email, newsletter, weekend messages, in person, groups, or classes, etc.—how can we best communicate the importance of our projects to people who need to hear about them and give feedback?

What are the best venues and gatherings to communicate and gather feedback?

List those venues here: (for example, Sunday morning, leader meetings, staff meetings, etc.)

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## Disciple

This is the best-kept secret of capital campaigns: **People can go to a new level in their devotion to Christ and His church.** People can also grow in their understanding of generosity, dependence on God, and meaningful living.

Church leaders can capitalize on this opportunity to play a bit of “catch-up” in the category of teaching about a generous life. We rarely come across a church that feels like they are ahead of the game when it comes to the connection between faith and money. Quite frankly, a majority of pastors tend to avoid the topic unless absolutely necessary, making giving less of a spiritual practice as a result.

If you catch a member of the congregation in a moment of candor, they will often reveal in hushed tones, “The only time our pastor talks about money is when we are behind budget.”

I admit I was one of those pastors back in the day. Can you really blame us? Money is rarely talked about in seminary, and people have so much dysfunction and emotion around the topic, the “risk vs. reward” of broaching the subject does not seem to go in our favor. Most of us see the topic of giving in teaching as the eating-your-vegetables part of pastoral ministry. We don’t really want to, but we know that we probably should.

Conversely, we also know that it is a major category of spiritual growth in the life of a disciple of Jesus. It is attributed to the great

reformer Martin Luther that “there are three conversions . . . of the heart, the conversion of the mind, and the conversion of the purse.” Charles Spurgeon writes, “With some Christians, the last part of their nature that ever gets sanctified is their pockets.” The Scripture has plenty of places that talk about the importance of money and possessions in the life of a person of faith. And this deeply important teaching has nothing to do with church operational expenses.

It says that people who understand this and exhibit generosity are embracing “true life.”

Instruct those who are rich in the present age not to be arrogant or to set their hope on the uncertainty of wealth, but on God, who richly provides us with all things to enjoy. Instruct them to do what is good, to be rich in good works, to be generous and willing to share, storing up treasure for themselves as a good foundation for the coming age, so that they may take hold of what is truly life.  
(1 Tim. 6:17–19)

So, the capital campaign becomes simultaneously an opportunity to raise necessary funds and a way to see members of the congregation spiritually matured in somewhat unexpected ways.

### *Deepening Our Devotion*

Jesus did not share the aversion to discussing money that many modern pastors and Christians have. It is widely known (and often forgotten) that He was rather quick to bring up the topic of money when asking probing questions about people’s faith. I would love to take the time to explore the theological and practical implications of this. Suffice it to say that how one handles the financial resources God has provided for them is a significant barometer of their faith.

This is not to imply that people who give more money are “better Christians.” But Jesus seemed to use the topic to get to the root of the matter. Why did He applaud the widow who gave 100 percent of everything she had? Why did He ask the rich man to sell everything and give his money away? It was likely because He knew that our faith is often marked by our tendency to either hold on white-knuckled to our stuff or open our hands and hearts to what God may have us do with His money.

So it is not recommended that church leaders say, “This campaign is not about the money, but about the spiritual growth we can all experience.” It is not recommended because it is not true. The campaign is both about raising money for the church and about how that causes us to ask deep spiritual questions about our lives.

For churches that are accustomed to a common curriculum or church-wide study motif for adults, the campaign provides an excellent opportunity to use those platforms to teach about giving, generosity, sacrifice, a meaningful life, God’s ownership of our resources, and more.

The common places for this to happen are:

- Groups
- Classes
- Bible Studies
- Leadership Meetings
- Worship Services
- Sermons
- Prayer Meetings
- Other . . .

Billy Graham said, “Give me five minutes with a person’s checkbook and I will tell you where their heart is.”<sup>5</sup> Campaigns can be a personal check-up on the checkbook (though no one seems to carry one anymore).

The idea still stands—the way we spend our money is inseparably linked to what we truly value. Jesus told us there was a connection like a spiritual cord between our bank account and our heart (Matt. 6:21).

### *Two Different Approaches*

It is a major missed opportunity if the campaign skips the glaring opportunity for nurturing the congregation and gets reduced to a basic fundraising format. As we say at Auxano, there is nothing wrong with fundraising, but this is not what the church should be about when a massive opportunity to disciple people is served on a silver platter.

This is the **funding-only** format and is *not recommended*:

1. We need money for a very special project.
2. You should consider giving extra money because it is great for the church but we can't pay for it out of our operational funds.
3. Pray about this and then pledge or give.

An entirely different format allows for individuals, families, Sunday school classes and small groups to go on a spiritual journey. The narrative changes in beautiful ways. The **discipleship-then-funding** format goes like this:

1. Our church has the opportunity to increase our impact.
2. It is causing us all to think about what our lives are really about and do a self-evaluation on our level of generosity and openhandedness with God's resources entrusted to us.
3. Each of us should renew and review the powerful spiritual principles of generosity and how

a Christian can live a counter-cultural life in this world.

4. What if we committed again to live this amazing and abundant life as we join the chain of generous people of faith that have gone before us?
5. Could we be generous all the time, not just when there is a special project?
6. We could pray about giving above and beyond because God has gone above and beyond for us in the gospel of Jesus Christ.
7. What if we depended on God in a new way, stretching our faith and our generosity?
8. Consider a pledge or commitment to our church's capital campaign as an act of worship—recommitting to Jesus Christ, His kingdom, and our church's future.

Discipleship guru and capital fundraising colleague David Putman reminds us that anytime you are reprioritizing how you spend or utilize money to invest in the work of Christ, something simple but dramatic happens. He applies it to not just the campaigns he has led, but the ones he and his wife have personally participated in. "When I am thinking 'less of me and more of Jesus,' my faith and my generosity grows. That's why I think campaigns are power-packed with potential for spiritual growth and discipleship."<sup>6</sup>



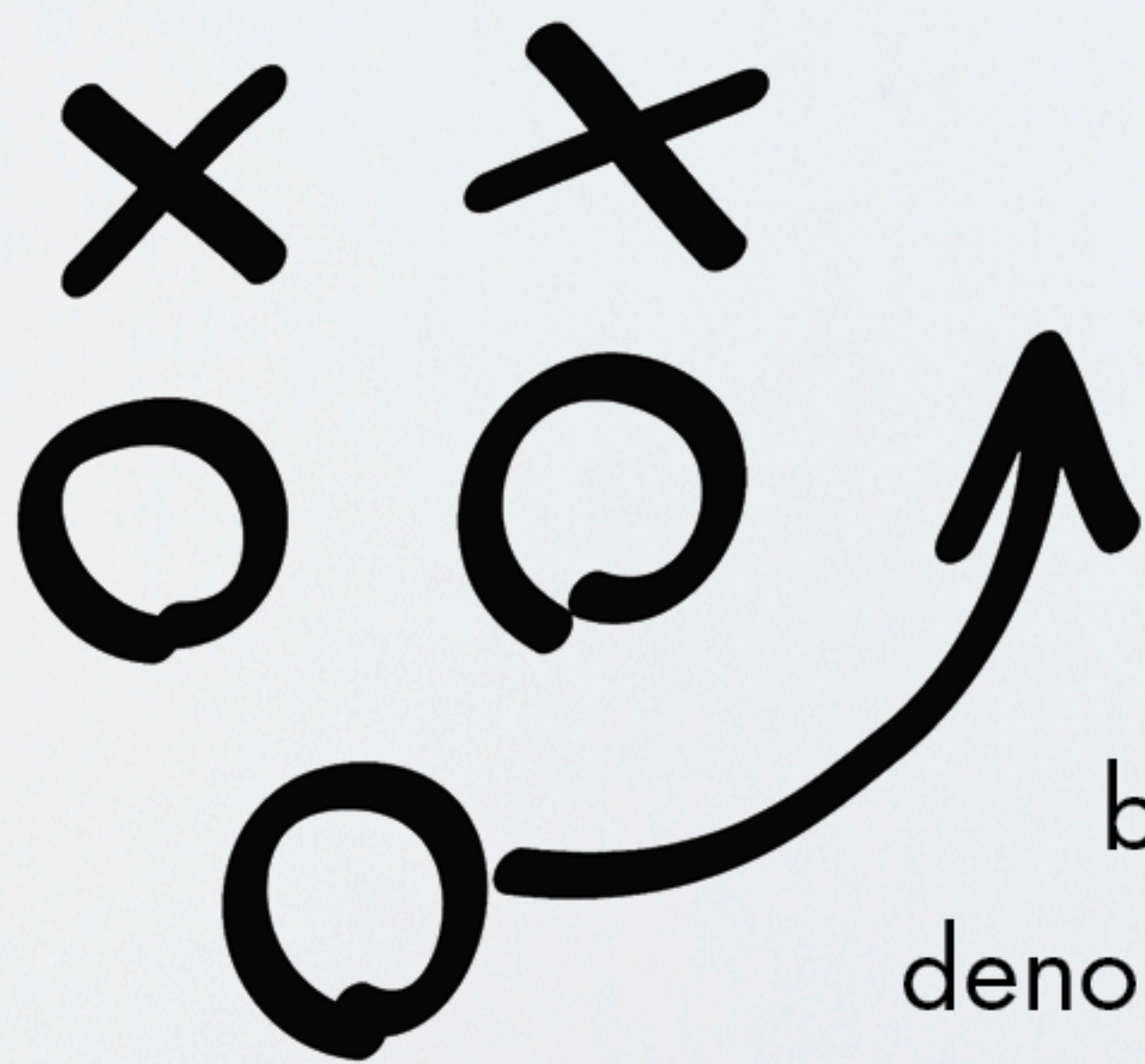
## QUESTIONS TO CONSIDER

Does our church make a distinction between stewardship and generosity? Tithing and offering? What other words do we use?

How would we rate ourselves in regard to teaching and development in generosity?

Are there discipleship venues or places where we could infuse teaching around generosity and giving?





For nearly twenty years Greg Gibbs has been helping churches from a variety of denominations, and has collected principles along the way. Having worked for two consulting organizations and researched many others, there are some universal categories that most church consultants will talk about with their clients. *Capital Campaign Playbook* is your inside access to these crucial conversations.

*Capital Campaign Playbook* is a guide for church leaders who want to understand the dynamics of a faith-based capital fundraising effort in a church. It is part workbook, part consultant's book of "trade secrets," and part owner's manual. For leaders of the church, it is a thorough explanation of what lies ahead, bringing a sense of courage and conviction where there is often trepidation.



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