

Benefits of a Campaign Planning Study

1. Achieves major cultivation event through confidential interviews of those deemed essential to success
2. Assesses institutional "capacity" - adequate staffing and technology
3. Ascertains realistic fund raising goal
4. Analyzes fund raising practices
5. Examines practice of sacrificial giving within the community
6. Tests the assumptions of leadership
7. Creates opportunity for parish to assess the consultant
8. Discovers challenges/opportunities
9. Measures community support for the project
10. Brings professional expertise to bear on major parish project
11. Identifies campaign leadership
12. Offers conclusions and recommendations on how to proceed
13. Builds consensus within the community through mailed and Internet-based surveys
14. Produces a 35-40 page report on the findings
15. Often discovers hitherto unknown major gift prospects

The Services of Stewardship Advocates

Campaign Planning Studies
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“Well done good and faithful servant.”

The Campaign Planning Study



Stewardship Advocates

Helping Parishes to Fulfill Their Mission



Fr. Anthony Scott is a priest of 32 years' experience including 18 years of full-time national and international fund raising experience in the Orthodox milieu. He is professionally trained in all aspects of *nonprofit institutional development*, having completed over 30 courses of study. In the past six years he served 62 Orthodox institutions in all jurisdictions—Metropolises, Dioceses, Parishes, Seminaries, Missions, Schools, Organizations, Humanitarian Agencies, numerous SCOBA-sponsored Charities, Foundations, Trusts, etc.

He is the editor of Good and Faithful Servant: Stewardship in the Orthodox Church, published by SVS Press in 2003. He is the publisher of "Orthodox Philanthropy", an occasional newsletter on best practices of Orthodox parish development and fund raising.

Fr. Anthony holds an bachelor's degree in English Literature from the University of California at Berkeley and a Master of Divinity degree from St. Vladimir's Seminary where he also served as Chief Advancement Officer for 12 years. During that time he directed a \$22 million capital campaign. All told, Fr. Scott has raised \$70-\$80 million in the Church.

He is the author of numerous articles on stewardship, strategic planning, board development, annual giving, etc. The story of his pilgrimage into Orthodoxy was published by Light and Life Press in the book, Journeys to Orthodoxy, ed. Thomas Doulis.



The Capital Campaign Planning Study

Universities, hospitals and cultural institutions accept that a Campaign Planning Study is essential to the success of any campaign. The information gathered allows a sound fund raising plan to be formulated, thereby avoiding grievous errors. Rather, it builds upon community strengths and significantly enhances prospects for success. The Planning Study takes 3-4 months to complete. The consultant works closely with the priest and a Planning Steering Committee (PSC). The many benefits of undertaking a Campaign Planning Study are listed on the back panel of this brochure.

The Service

- 1) The consultant carefully explains the process to the priest and the PSC. He then mails to them the guidelines and documents necessary to manage the project. Sample documents from other successful Planning Studies are provided. The schedule for the project is agreed upon.
- 2) The PSC drafts the "Statement of Need", identifies prospective interviewees, manages the mailing inviting interviewees to participate and then follows up with a phone call further explaining the project and asking for their participation. An interview time is scheduled. The consultant carefully coaches the PSC through the process.
- 3) The consultant then comes to the parish for 3-5 days depending upon the number of parishioners to be interviewed. He conducts the interviews at the Church, if possible. When an interviewee is not able to come to the Church or is out of town, the consultant may interview them by phone. Often parishes also choose to have a mailed survey to the entire parish or offer an Internet-based survey option because they wish to demonstrate inclusiveness. The consultant also assesses the information management

software and financial processes of the parish relevant to a prospective capital campaign.

- 4) The consultant then returns to his office to write the Capital Campaign Planning Study. He applies professional analysis based upon 18 years' full time fund raising experience, having completed 30 courses of study in non-profit institutional development and having conducted scores of Campaign Planning Studies. The 35-45 page Campaign Planning Study reports on the findings, identifies challenges and opportunities, suggests potential leaders, recommends a reasonable fund raising goal, assesses the sacrificial giving practice in the parish and offers informed recommendations on how best to proceed.

Frequently Asked Questions

Q: How do we know whom to interview?

A: Those deemed essential to the success of a capital campaign are those to be interviewed. These are likely people capable of major gifts or influential opinion-makers within the community

Q: What is the cost of the service?

A: Fund raising consultants universally condemn as unethical the practice of compensation as a percent of what is raised. The service is offered at a flat rate, plus expenses, based upon the number of interviews, whether or not a mailed survey will be included, etc. Expenses typically include, air travel, accommodations, car rental, meals, printing, etc.

Q: How do we convince decision makers in the community that this is necessary?

A: Invite Fr. Anthony to come one evening to present the service to the leadership of the parish. There is no fee or cost for the visit. Fr. Anthony introduces himself, makes a brief PowerPoint presentation, provides referrals if requested and answers questions. It is respectfully requested that the meeting has a single-item agenda.