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## Appendix A: ELCA Comprehensive Campaign Feasibility Study: Executive Summary of Findings and Recommendations

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### Overview

As a result of an in-depth study of income to the churchwide expression of the Evangelical Lutheran Church in America (ELCA), the ELCA's Blue Ribbon Committee on Mission Funding recommended a test of the feasibility and readiness for a churchwide funding initiative. Growth Design Corporation (GDC) was retained in May 2008 to conduct a study overseen by a task force composed of churchwide organization staff members, synodical bishops, and volunteers with expertise in nonprofit fundraising campaigns. The results of the study were used to develop a recommendation to the ELCA Church Council that was presented at the council's March 2009 meeting. The recommendation appears in the final section of this executive summary.

### Feasibility Study Process

Growth Design Corporation conducted 32 formative interviews with churchwide and synodical leaders. The information gathered from these interviews was used to develop an initial case for giving, titled "Imagine." This case was then presented to 74 donor prospects, pastors, and bishops for input. GDC also conducted a readiness assessment to test this church's capacity for launching a comprehensive churchwide campaign.

### Findings from Formative and Feasibility Interviews

Based on the interviews conducted by GDC, there would appear to be no question about support for a churchwide initiative. This finding holds across all interviews in all regions, categories, and levels. The ELCA as an organization is valued by most of those interviewed. Connecting ELCA members and the three expressions of this church through an initiative such as this is strongly supported.

While there is a varying degree of interest in the initiative priorities presented in the draft case for giving, two priorities emerged as primary in the minds of donors:

- 1) The first and most attractive initiative for many donors interviewed in the feasibility study process would focus on church renewal and leadership development. Many of those interviewed raised concerns about the current state and the future of this church, and expressed a belief that, unless new leaders are raised up and congregations are renewed, there will be little likelihood of future ministry and mission fulfillment.

- 2) The second important initiative priority is global mission support for hunger, malaria, and HIV and AIDS efforts. Coordination and support for these efforts are perceived as an appropriate role for the ELCA to play, and have both current and historical gifting appeal, especially at the member and congregational level.

Several consistent themes emerged in relation to future churchwide initiative strategies and campaign execution:

- A churchwide initiative must be as much about listening, engaging, and thanking as it is about asking, as it relates to donors and volunteers;
- The initiatives presented as part of a churchwide fundraising campaign must be integrated, not only with the three expressions, but also with programs of church-related organizations that have common concerns and interests in relation to the future of this church: e.g., the ELCA colleges and universities, seminaries, social service organizations, and other recognized ministries; and
- The donors, both laity and clergy, must lead and own any churchwide initiative, and must believe that their hard-earned resources will have impact and results if given as gifts to the ELCA. Therefore, a structure and a process for a churchwide initiative must be built and connected to the leadership, both lay and clergy, who will oversee and manage its multiple components, including a campaign.

It should be pointed out that the feasibility study process occurred during a period of worsening, chaotic, and volatile economic conditions. To date, there is no solid information on the timing, outcome, and conditions of the next five years in relation to giving or the environment of need that it would be important for a church body to address. In addition, major donors interviewed in the feasibility study who are capable of \$1 million-plus gifts were unwilling to commit to a specific level of giving, even while they committed to giving to a churchwide initiative.

### Findings from Readiness Assessment

It should be noted that the Development Services (DS) unit and the Foundation of the ELCA have been focused primarily and historically on planned giving in relation to their programs and initiatives. Consequently, securing current major gifts has not been a primary fundraising focus, although there have been several significant current gifts successfully sought and secured in recent years for global health and hunger initiatives as well as for the Fund for Leaders.

Development support and operations appear to be more internally focused in relation to capacity or current gift strategies. As a result, programs may tend to be insulated

from major-donor expectations and interests in terms of how they are positioned, presented, or refined. The question of organizational structure and function will need to be addressed in relation to major-gift capacity-building strategies and investments.

In interviews, staff members acknowledged the lack of capacity to be able to organize and implement a major giving initiative. While several staff members have been engaged in the implementation of current giving strategies, they also wear operational “hats” that limit the amount of time that can be allocated to work in the field.

A review of the major donor prospect pool does, however, justify an investment in capacity-building in order to add the field officers, staff, systems, and supports to undertake a major churchwide initiative.

## **Feasibility Study Recommendations from Growth Design Corporation**

To a person, those interviewed as part of both the formative and feasibility interview processes expressed great passion and respect for the ELCA’s accomplishments at all levels. In many ways, they expressed a desire to be more informed about, more engaged with, and more connected to all of the expressions of this church, especially in relation to the plans, structure, leadership, and outcomes of an ELCA churchwide initiative.

The major challenge before this church, then, is how to connect and engage all of its members with emerging priorities and needs as defined in the churchwide initiative. Specific recommendations included:

- Tie a churchwide fundraising campaign to the ELCA’s 25th anniversary in 2012;
- Challenge synods and congregations to develop projects that are synergistic with churchwide initiatives. Synods can integrate their own fundraising plans with the churchwide initiative;
- Develop a communication strategy for clarifying the role and importance of the churchwide expression of the ELCA; and
- Identify and recruit volunteer teams of donor prospects and ELCA leaders to develop campaign strategies and participate in fundraising.

Major-gift capacity-building is key to securing future funding of the ELCA’s mission, and resources will need to be allocated specifically for this capacity-building.

## **Recommendation to the Church Council**

An analysis of the report and an assessment of the current economic climate informed the development of a recommendation for the Church Council that will help this church move toward a possible campaign in a strategic and well planned manner.

While there was overwhelming support for a churchwide initiative, two items from the feasibility study caused the task force to step back from recommending a comprehensive campaign at this time. First, it was clear from interviews that the recent economic downturn was of great concern to donors. Interviews held in the late summer and early fall revealed enthusiastic support for a campaign, while those held in the late fall and early winter, after the economy had retracted, had a more cautious tone. Moving forward with a campaign while congregations and synods struggle to meet budgets seemed unwise.

Second, the study of capacity revealed several areas that must be addressed before beginning a campaign. While there are many faithful and generous donors, the ELCA has work to do to engage these constituents in the ongoing work of the churchwide organization. This engagement is an important step in cultivating the major-gift prospects needed for a successful campaign. In addition, the ELCA must strengthen its internal capacity to manage a campaign.

While recognizing the current economic situation and the churchwide organization’s need to build capacity, the ELCA has an opportunity to begin actively raising money for two smaller, targeted campaigns: the HIV and AIDS Strategy and the Lutheran Malaria Initiative. These campaigns offer the opportunity to engage members of this church in exciting new ways and may clarify the task force’s recommendations for a more comprehensive, churchwide campaign in the future.

With these issues in mind, the task force recommended and the Church Council approved the following next steps:

- 1) Development Services and the Foundation of the ELCA will move toward implementation of the capacity-building recommendations in the next biennium (2009–2011);
- 2) A report and recommendations for a possible churchwide campaign will be brought to the April 2011 meeting of the Church Council for possible consideration by the 2011 Churchwide Assembly. The report will include an affirmation of readiness; an assessment of capacity, including staffing implications; and a proposed budget;
- 3) The ELCA will move forward in planning and implementing a \$10 million fundraising initiative to support the HIV and AIDS Strategy, if approved by the 2009 Churchwide Assembly; and
- 4) In partnership with Lutheran World Relief, The Lutheran Church–Missouri Synod, and the United Nations Foundation, pilot and major-gift fundraising for the Lutheran Malaria Initiative will be initiated.