



**Pre-Capital Campaign  
Feasibility Study**

**Executive Summary Final Report  
and Next Steps**

*for*

**The Wisconsin Conference of the  
United Methodist Church**

Sun Prairie, Wisconsin

April 2017

**The James Company**

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*Turning Your Vision Into Reality*

## INTRODUCTION

We are pleased to present this Planning Feasibility Study Executive Summary Final Report to the Wisconsin Conference of the United Methodist Church outlining the details of *The James Company's* findings and recommendations for a proposed financial campaign.

The purpose of the Study was to test the readiness of the Conference to support the proposed case for support and the ability to raise approximately \$6,000,000 to \$8,000,000 through a financial campaign. By means of a series of personal face-to-face interviews, Conference-Wide Surveys and Open Information Forums, *The James Company* set out to test the Case for Support, gauge the ability of the Conference to provide funds for the Case and to determine leadership and volunteer potential for implementing a campaign.

This report outlines the Planning Feasibility Study responses and findings. First, we illustrate the study process, highlighting and identifying the key components which were critical in the process; second, we present an in-depth recording of responses, analysis of findings and observations. Third is a detailed evaluation of the essential elements of a campaign as they pertain to the Wisconsin Conference of the United Methodist Church. Lastly, we present our recommendations to be considered by the Conference prior to launching a fundraising initiative.

The principal objectives of this Planning Feasibility Study were to:

- gauge clergy and lay leadership views on the image of the Conference.
- define and assess the various strengths and weaknesses of the Case for Support as it relates to a possible fundraising initiative.
- assess the appeal of the proposed Case for Support, to those closest to the Conference.
- determine the level of financial contributions that could be expected that would ensure a successful campaign.

- determine the most appropriate time for a financial initiative.
- determine the level of interest in the *Mutual Benefit Appeal* stewardship development model.
- determine if the identified goal of \$6,000,000 to \$8,000,000 is realistic and attainable.

At *The James Company*, we are conscious of our responsibility in presenting this report and our recommendations. It is our goal to be both clear and concise in our statements and to present a report that will be of substantial value to the Wisconsin Conference of the United Methodist Church in developing its fundraising plans and objectives for a potential financial initiative.

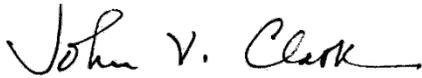
This report represents *The James Company's* professional judgment. Our experience provides the basis for our assessment of the advice and counsel solicited from the Planning Feasibility Study participants, and participants from the Feasibility Study Task Group who made contributions outside the formal activities in preparation for the study process.

The findings are attitudinal in nature and based on individual perceptions and opinions. In combining both quantitative and qualitative feedback, we offer a more comprehensive analysis of the study results.

We have enjoyed this opportunity to participate in the development of the fundraising plans for the Wisconsin Conference of the United Methodist Church and to play a part in the ministry of the Conference. We would like to acknowledge the efforts and the assistance provided by the Feasibility Study Task Group: David Blackmer, Randy Chapin, Kate Croskery Jones, Dan Dick, Howard Hintzman, Jean Ehnert Nicholas, John Ramstad, and Amanda Stein. Most importantly, we wish to thank the many individuals who gave freely of their time to assist the Conference and us with this study by their participation.

We look forward to being of service in the future and to helping you achieve your fundraising goals for the Wisconsin Conference of the United Methodist Church.

Yours in Christian Service,



John V. Clark  
President



Donna Lund  
Program Administrator



Tim McKearn  
Program Director

## **Executive Summary, Recommendations and Next Steps**

## EXECUTIVE SUMMARY, RECOMMENDATIONS and NEXT STEPS

*The James Company* was retained by the Wisconsin Conference of the United Methodist Church in June of 2016 to conduct a Planning Feasibility Study, investigating the support for a \$6,000,000 to \$8,000,000 financial campaign to fund the following objectives of *Make A-New Wisconsin*:

- Creating New and Renewed Congregations
- Developing Christian Leaders
- Engaging with the Poor

## STUDY FINDINGS

This comprehensive planning feasibility study provided literally thousands of bits of information – including statistical data and personal comments from more than 90 congregants, clergy, and others who were personally interviewed from across the Conference. The study tools employed – consultations with a variety of groups/ministries, Conference-Wide Survey, Open Information Forums (with over 200 attendance) and Individual Interviews – provided a very thorough and inclusive process. The Open Information Forums and Surveys reflected very similar responses and were not significantly different than the face-to-face responses.

## ***Image***

Overall, participants view the Conference as a good organization. Undoubtedly, the leadership of Bishop Jung is considered its greatest strength.

Participants had a few areas of weakness to discuss. Some main issues are the vast geography of the Conference which hinders “connectedness” and support, struggling congregations, an aging demographic, concerns regarding fiscal accountability, fairness, and transparency as well as how the Conference is organized administratively. Many respondents did not have an awareness of the duties/role of the Conference staff.

## ***Case for Support***

The three Case initiatives were supportable in and of themselves. The challenge for the Conference is to refine the overall plan by providing specifics for how *Make A-New Wisconsin* mission funds would be applied for, distributed, and accounted for. The Case needs to convey **urgency, hope and a compelling vision for the future** of the Conference.

On the whole, participants recognized that the Conference would benefit from the three Case initiatives, but many details remain unclear. More detailed, tangible outcomes will be required in the final Case to gain the necessary support and endorsement of the Conference.

The participants would like to see the Conference integrate the vision with the plans to provide sustainable communities of faith for the future. In summary:

- The financial needs of the congregations and Conference are understood by the respondents. The Conference must consider Case elements and programs that will support a long-term vision for the Conference. The Case needs to be focused, direct and details spelled out.

- We heard considerable concern from congregations that many of them were experiencing financial struggles. The congregations may require a larger share of the monies raised through the Mutual Benefit Appeal due to their many local needs. A percentage of at least 50% to the congregation is recommended. It is further recommended that congregations receive the Mutual Benefit Appeal guidance without having a fee attached to their participation in the program.

## ***Leadership***

Identifying and engaging leadership and volunteers for a campaign can be difficult; however, with a strengthened Case and a vision for the future, volunteer and leadership resources will be available for a financial campaign in the Conference. The Conference is rich with capable and willing members.

## ***Goal Attainability and Financial Support***

Overall, participants were not optimistic about the attainability of a \$6 - \$8 million goal, feeling that this amount would be unachievable. The ongoing volatility of the economy, struggling congregations, denominational issues, recent/current congregation campaigns were all cited as hurdles in reaching this goal.

- A high percentage of respondents would make a gift to a campaign.
- No major donors were identified in this study.
- The average gift was moderate, and limits the goal amount.
- *The James Company* believes that the Wisconsin Conference of the United Methodist Church is positioned to undertake a **\$5 million financial campaign, over a 5 year period**, to fund critical priorities and build capacity for the financial health of the congregations and the Conference.

- There are financial and non-financial benefits to a Conference initiative. Strengthening stewardship as well as bringing both congregations and the entire Conference together behind a common goal as well as leveraging the Methodist value of connectedness are but a few examples of these benefits.

## ***Other***

- Many have left a gift to the church in their will and many more would consider doing so.
- Most respondents would prefer to leave a bequest to their congregation.

## ***Recommendations and Next Steps***

The Planning Feasibility Study has provided great insight into how a campaign can proceed successfully and has revealed the most compelling aspects needed in the Case for Support.

The following recommendations have been developed by *The James Company* study team. We believe that these suggestions, if well planned and executed, will have a positive impact on the overall success of a Conference campaign:

1. Send personal thank-you letters to all known study participants, including the Executive Summary of the Final Report, if appropriate.
2. Take time to discern the report and be in prayer for the Conference.
3. Inform Conference leadership of the results of the study.
4. Prepare and present a brief summary of the study findings to the 2017 Annual Conference, including a motion to move forward with addressing the study findings and *The James Company* recommendations. Once the Case for Support has been refined, and more consensus has been built around the proposed objectives, a motion will be introduced to the 2018 Annual Conference for launching a financial campaign.

5. Create two working groups to prepare for the financial campaign:
- Case for Support Working Group (CFSWG) to refine the Case for proceeding to a Conference-wide financial campaign that is visionary, demonstrates urgency, is compelling, specific, and reflects the study input. This group should include as many members of the Feasibility Study Task Group as willing to participate, and expand accordingly with three (3) to five (5) clergy (see number 6 below). This group reports to the FSICG.
  - Financial Stewardship Initiative Core Group (FSICG) to begin the preparation and readiness tasks of a campaign. The FSICG should:
    - a. Prepare a theological statement and prayer platform for the financial campaign, the current and planned activities of the Conference and the proposed fundraising initiative.
    - b. Seek out examples of other mission-based fundraising initiatives in Conferences across the country and gain insight from their experiences.
    - c. Set a preliminary budget for a financial campaign
    - d. Set a preliminary goal for the financial stewardship initiative
    - e. Create and implement a Communication Plan for updates on the Case development; engage congregations across the Conference in education and communication about the upcoming financial campaign, and the role it will play in supporting their congregation.

6. Meet with clergy at an all-day Clergy Day to build consensus for a financial campaign and invite approximately three (3) to five (5) members to expand the CFSWG. The plan must be fully endorsed by clergy. Gaining their input and support is essential.
7. Congregations should begin preparing for a financial stewardship initiative months in advance of a launch. Preparation includes a congregation plan that states their understanding of “God’s Mission” for them. Congregation planning, and setting the direction for growth and vitality is a critical step in the process. Fundraising can only be successful once this congregation plan is formalized and vetted in the congregation. *The James Company* believes that this step is critical to a successful financial initiative.
8. It is essential that a guideline, or budget, for campaign costs be established that is sufficient to do the job well, but which also assures economy, efficiency, and good stewardship. *The James Company* recommends that the Conference set a ceiling for a financial campaign with a Conference goal of \$5 million over 5 years. A budget should be carefully considered and must be transparent and acceptable to the Conference.
9. In the Planning Feasibility Study, it was emphasized that the financial campaign must be conducted by Conference leadership with the support of professional counsel. *The James Company* believes that a successful Conference campaign can only be achieved with the assistance of a firm that has church fundraising experience and expertise. The FSICG is capable of guiding and coordinating a Conference-wide financial development initiative. However, there are many other resources necessary to execute a successful financial campaign. It must be recognized that the overall plan and financial objectives are very substantial, and the timetable is extremely demanding. There is also a direct relationship between the amount of money raised and professional

counsel involvement. We believe that the Conference should retain professional counsel for the design and execution of the program across the Conference. Finally, the recommended goal in this report for the financial campaign assumes professional counsel involvement.

10. It will be critical for the success of this financial initiative that it be led by a team of clergy and lay leaders who are known and trusted for their skills and abilities. The initiative must be seen to have a wide and deep following. The Bishop is highly respected and should play a key leadership role in the process. Clergy input and support are critical to finalizing the elements, vision and campaign plan. All clergy should be well aware and involved in the process.
  
11. The **mission** of the **church** is to make disciples of Jesus Christ for the transformation of the world. This needs to be in the forefront not only in the upcoming twelve months of planning and refinement, but for the campaign as a whole.