

A Strategic Plan with Timelines for

The GIFT Campaign

St. Ferdinand Parish

02/21/08

Draft 1

I. What is a capital campaign, strategic plan?

A written and adopted strategic plan is an opportunity to

- Attune to the Parish in order to establish and organize viable steps toward their goals
- Set priorities and directions that accomplishes each Parish campaign goal
- Review fundraising steps and priorities for prior approval by those who must implement them
- Establish campaign phases, dollar amounts and calendar timelines to guide Parish efforts
- Write an accountability document that communicates progress in the campaign

The details of the strategic plan should produce deep support towards funding and building the project, and it should increase participation levels by those capable of achieving campaign goals.

The GIFT Development Committee (GDC) should review and analyze the strategic plan as having appropriate amounts and types of the right steps needed for this particular campaign and the types of strategies likely to maximize campaign momentum. Only after GDC review should the campaign director begin conducting approved fundraising actions. The GDC should review implementation of the plan as the campaign proceeds. That introspection is likely to result in minor or major revisions that aid effective communications and maximize participation.

II. What is the GIFT campaign?

GIFT, as a campaign, is a working title for the fundraising effort to renovate and make additions to the St. Ferdinand Parish infrastructure. The acronym, GIFT, refers to three spiritual outcomes of this campaign. Those “gifts” to the entire Parish are:

- **G**rowing In Faith Together
- **G**athering In Faith Together
- **G**iving In Faith Together

A wag suggested that this campaign also could be termed “the three-G campaign”, slang referring to a recommended amount (3 G’s) that each Parish family ideally would pledge to raise the entire \$10M that was needed according to the finance committee. Another wag noted that with Father Gallagher’s support and involvement, it could be a \$4G campaign.

A campaign’s title should be inspirational and memorable. Continued use of this title should remind parishioners of the capital improvements that the campaign will create and the rationale for these improvements. While a strategic plan should create wide ownership of the logistics and objective concepts in the GIFT campaign, the campaign title and logo should symbolize the campaign’s impact on the heart and soul. GIFT graphically could show the “G” with two shadow G’s followed by the capitalized IFT.

An alternate, but similar, proposed theme relates to the welcoming family atmosphere at SFC and building an addition to our religious home. A title for that theme has not emerged yet. Therefore, the GIFT acronym will serve as a working title until a title is finalized.

Acronyms:	SFC St. Ferdinand Church	PLC Parish Life Center
GDC	GIFT Fundraising Committee	GIFT Gathering, Growing & Giving in Faith Together

Objectives

The GIFT strategic plan objectives establish:

- Campaign amounts, what is to be funded and approximate costs of project elements
- Timelines for the campaign phases (marketing, quiet phase, public phase, naming ops, etc.)
- Unifying messages to demonstrate why the campaign is a strong need at the SFC Parish
- A campaign title and theme that clarify understanding of the project outcomes
- Compelling language that the parish endorses and will actively support for 3-5 years.
- A direct request process that maximizes parish participation, especially during the first year of the campaign when solicitations begin
- Fundraising processes that will sustain fundraising after the campaign
- Fundraising events that will supplement direct requests to Parishioners during the campaign
- Flexibility so that the strategic plan can change as needed while the campaign unfolds.
- A 3-5 year calendar that is feasible, logically timed, and appropriate for the SFC culture.
- A document that is formally reviewed, fully understood, and formally approved.

III. Campaign Goal

The cost of the building renovation and additions is estimated to be \$10 M. That total is believed to include architect and construction costs, materials, change-orders, inflation costs and demolition costs. Construction can begin with diocesan approval when 62.5% of the actual goal is raised. If the actual goal stays at \$10M, a diocesan loan of \$3.75M would be obtained:

- When \$6.25M is banked with the diocese for the building campaign (not just pledged)
- Based on a diocesan-approved plan of how the Parish plans to pay whatever mortgage remains after the campaign.

At this point, the campaign total does not include funding for equipment, furnishings, utilities and maintenance. *(It is important to include those items for total functionality of the resultant building.)*

IV. Theme

The campaign theme will be incorporated in all campaign communications to help volunteers and donors to “stay on message.” The theme will include a logo for SFC letterhead and artwork. It also will include terminology that is consistently used in solicitations and events to describe program and building outcomes and the benefits of the campaign to each parishioner. This “branding” of the campaign lets all participants understand the campaign and its intended results in the same way.

The primary focus of fundraising communications and events will be to bring SFC Parish Life Center functions to life even before the center is built. The secondary purpose will be to raise funds during these events. When used with potential donors during solicitations the theme clearly describes how the campaign will advance and improve Parish programs and build necessary and important capital improvements.

V. Fundraising projections for a three-year campaign with a \$10.0M goal

Campaign feasibility study fundraising projections (\$6.5M to \$8.0M) are less than the Parish goal of \$10M. Thus, if these projections are correct, this campaign must prepare with post-campaign strategies as well as campaign strategies that keep parishioners and staff motivated for 5 years. If most parishioners make 3-5 year pledges, construction may not begin until 2011 or 2012.

Month / year	Annual projections	average progress	annual subtotal
03/08 – 02/09	\$1.8M raised or pledged	\$150K / month	\$1.8M
03/09 – 02/10	\$2.4M raised or pledged	\$200K / month	\$4.2M
03/10 – 02/11	\$2.4M raised or pledged	\$200K / month	\$6.6M

Post-campaign fundraising events plus payment of five-year pledges

03/11 – 02/12	\$1.2M raised	\$100K / month	\$7.8M
03/12 – 02/13	\$1.2M raised	\$100K / month	\$9.0M

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VI. Campaign Timelines

This campaign is estimated to last 3-5 years with timelines needed for completion of specific campaign actions. Proposed actions are drafted below in approximate chronological order.

<u>Timeline</u>	<u>Campaign Action</u>
02/08	Review parish directions and building plans with architect, SFC committees and leaders
03/08	Establish campaign goal dollar amount that includes refined estimates for what is to be funded (buildings, furnishings, utilities, maintenance, campaign costs, etc)
03/08	Make Campaign Director a member of the Finance Committee
03/08	Review and approve the campaign strategic plan (Pastor and Pastoral Council)
03/08	Develop a list of prospective large donors through analysis of relevant computer data
03/08	Document the benefits of the PLC to the parish
04/08	Develop branding, theme and imagery for marketing and communication in cooperation with the SFC marketing committee
	Analyze volunteer reactions to branding, theme and imagery items for revision
	Begin development of campaign brochures and visuals
	Find parish volunteers to assist with brochure graphics and presentation
04/08	Design a naming opportunity plan and rationale for renovated and new spaces
05/08	Establish task lists for the marketing and fundraising committees to implement
05/08	Consider development of a DVD for a virtual tour of the PLC
05/08	Interview/select volunteer leadership list based on abilities to complete functions
05/08	Complete "asks" to ten donors in the quiet phase
	Train Father Gallagher to do solicitations
	Train parochial vicars to do solicitations
	Train Fundraising committee to do solicitations
	Prepare folder with information on gift types (see section XII)
06/08	GDC reviews productivity after ten "asks" to revise process, if necessary
	<ul style="list-style-type: none"> • Modify and refine documents used in solicitations • Develop projections for the remainder of the quiet phase • Continue "asks" based on committee review and revisions
07/08	Set calendar and sub-goals for public phase of campaign with aid of Parish staff
	<ul style="list-style-type: none"> • Establish goals within groups for each ministry in the public phase • Meet regularly with parish staff and ministries to assist with their needs and communicate progress of each ministry towards its sub-goal • Establish training process for each ministry
08/08	Team completes first 30 "asks" in quiet phase
09/08	Father Gallagher educates the parish as to spiritual and legacy values of the PLC
09/08	Public Phase of the Campaign begins one week after his homily on the values of the PLC
TBA	62.5% is reached – \$6.25M raised, enough to begin PLC construction (\$3.75M still needed)
TBA	Parish celebration of construction start
03/11	Three-year pledges from the GIFT campaign end
03/11 – 03/13	Post-campaign events continue to fund transition expenses (equipment, utilities, additional furnishings, etc)
03/13	Five-year pledges end

VII. Campaign literature

GIFT campaign literature will be designed and distributed in the form of brochures, videos, DVDs, bulletin inserts, handouts, pledge forms and progress reports. Language in these communications should be consistent so that the campaign theme and branding are accented in each. The campaign theme will put a positive, solution-oriented focus first on addressing parish needs and then on the benefits of the Parish Life Center to each parishioner and their families.

To that end, draft copies of all campaign communications are provided to the campaign director, before distribution, for potential editing. This editing process is designed to prevent inadvertent use of language that might conflict with statements in other literature.

Here are some of the messages that are planned. These messages will be refined through the efforts of a parish marketing committee for the GIFT campaign.

- At St. Ferdinand Parish, we are renowned for our warm, welcoming atmosphere. Many parishioners fondly remember how they were greeted and accepted as family. With the PLC, we can pay it forward so future transferees to Cranberry will feel welcome at SFC.
- The Center's additional spaces will allow our Parish to grow and gather even closer together in faith and fellowship as an extended family.
- Our existing facilities will be reworked, repurposed and renovated so that we are better connected in a multi-functional, Parish Life Center
- Our Center's multi-purpose rooms will serve all ages as places for religious education, group meetings, wellness activities and social gatherings.
- People at St. Ferdinand develop new ministries and services for the community. When the PLC is finished, there will be enough places for these new parish services to thrive.

VIII. Large Donor Solicitations

The first 4 to 6 months of the campaign (quiet phase) will involve solicitation of large pledges and gifts (\$100K+) from parishioners. Most of these solicitations will involve the pastor and the campaign director as a team using a researched database of prospects. The nature of these requests, pledges and gifts will take several forms both in the quiet and public campaign phases as seen in section X of this plan (below).

IX. Medium Donor Solicitations (Each gift is \$10K-\$99K)

The same strategies will occur in this facet of the campaign as for the large donors. This process, in general will occur before and during the public phase of the campaign in 2008-2011. Donor information will be gleaned from database research. Solicitations will be individual and will involve Father Gallagher, Father Ed or Father George and the campaign director. Some solicitations will not require the presence of the priests. Instead, the involvement of a knowledgeable parishioner with a connection to the donor may help the campaign director to "open doors".

X. Small Donor Solicitations (Each gift is less than \$10K)

This set of solicitations is called the public phase of the campaign. Similar strategies will be used here as for the large and medium donors. There are several steps in this solicitation.

1. When the public phase of the campaign begins, it does so with a homily where the Pastor explains the importance of the Parish Life Center to the future of the Parish. Furthermore, he speaks to the Parish about his commitment to the building project and his need for the Parish to be committed.
2. The following Sunday is called Pledge Sunday. The pastor explains the several options that each person/family can choose in making a gift and/or pledge. He reiterates the importance of the campaign and asks them to pledge.
3. For those parishioners who do not respond to the Pledge Sunday solicitation, there is a follow-up letter that explains donor options and requests the parishioner to participate.
4. For those parishioners who do not respond to the written solicitation, a friend from the GDC will call and ask for an appointment to speak about the campaign in their home.

XI. Gift forms

- Unrestricted gifts used for any aspect of the building plan
- Restricted gifts used as the donor designates if the Parish accepts the gift restriction
- Increases in offertory gifts to:
 - Balance increasing operating costs of the Parish and the campaign
 - Aid offertory surpluses that go to the building fund
 - Maintain the operations of the new and renovated facilities after construction
- Trusts whose proceeds may not be received until after the campaign has ended
- Restricted program support that aids aspects of SFC operations or initiatives
- *No cash campaign* pledges to buy gift cards from the Parish for rebates
- Insurance where SFC is a beneficiary of the policy (generally unrestricted)
- Naming and furnishing spaces in the Parish Life Center (described below)
- In-kind gifts such as construction materials or services or gift cards for business purposes

XII. Naming and Furnishing Process

Each naming opportunity would proceed through a specific process.

1. The Campaign Director proposes a price list for the spaces to be named.
2. The Development Committee approves this price list.
3. The fundraisers approach prospects to fund named spaces.
4. Policies are established that preclude commercial naming or furnishing of spaces.
5. The pastor reviews and approves each prospective name before acceptance of the gift
6. The FDC approves proposed amounts that vary from the approved price list.

XIII. Spaces to be named and/or Furnished with prices

Funds raised for naming spaces are considered unrestricted funds that can be used for any aspect of the building fund costs. Funds raised from furnishing spaces are considered restricted funds that will be used to furnish the chosen space with leftover funds becoming unrestricted.

(Notate bene: The following numbers, prices and costs are guesstimates of the actual numbers. These numbers serve as placeholders to explain how the prices for named spaces are calculated and explained to potential donors. With the help of the architect, these numbers will be replaced by the end of March.)

<u>Space(s) to be named</u>	<u>Price to name</u> ($\leq \frac{1}{4}$ of building cost) for each space)	<u>Price to furnish</u> (= actual cost)	<u>Cost to build</u> (@ \$75 / ft ² for renovated & \$150/ft ² for new spaces)	<u>Funds raised</u> (subtotal)
Gymnasium	\$100K	\$30K	\$400K	\$130K
Large Hall & Kitchen	\$100K	\$50K	\$1.2M	\$150K
Narthex connector	\$90K	\$25K	\$700K	\$115K
Snack bar	\$15K	\$25K	\$60K	\$40K
Classrooms (17)	\$15K	\$15K	\$45K-\$90K	\$510K
Offices (12)	\$ 10K	\$5K	\$22K-\$44K	\$180K
Garden (2)	\$ 25K	\$5K	\$100K	\$60K
Small Hall (2)	\$ 30K	\$10K	\$75K-\$150K	\$80K
Nursery	\$20K	\$10K	\$80K	\$30K
Children's Liturgy	\$20K	\$10K	\$80K	\$30K
Church pews (20?)	N/A	\$5K	\$100K	\$100K
Ed. Bldg. Vestibule	\$10K	\$8K	\$40K	\$18K
Parish family wall tile (5000)	Any donation for 1 st tile \$300 for subsequent tiles	N/A	\$10K	\$20K est.
Subtotal naming	\$960K (unrestricted)			
	Subtotal furnishing	\$503K (restricted to furnish chosen spaces)		
		Total potential funds raised		\$1,463,000

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XIV. Events

As mentioned before, the events for this campaign serve to create fellowship and stewardship in the parish even as they raise money for the building fund. The best of these events will become part of the culture of St. Ferdinand. In essence, these events build the spirit and ministries of programs in the Parish Life Center before the facilities have their renovations and additions.

The SFC **Festival** has served to add to the banked funds for the building campaign in some years. In other years, it served to supplement offertory gifts in paying SFC operating costs. For this campaign to be successful, the offertory gifts must be sufficient to pay parish operating costs without help from fundraising events so that proceeds from the festival and other fundraising events can bolster the building fund. **In other words, parishioners serve SFC's campaign better if they maintain or increase their offertory gifts and pledge to the building fund.**

These events should raise \$250K - \$300K each year during and after the campaign. During the 3 years of the campaign, it is projected that events will raise a total of \$800K for the building fund. The GIFT campaign will assimilate the operating costs for fundraising groups in the Parish temporarily as a method of unifying the Parish with GIFT as highest priority. This assimilation will remove competing funding efforts for the duration of the campaign. Thus, this assimilation will reduce event revenues by about \$30K per year. SFC would hold about four large events per year and four small events during the three years of the GIFT campaign.

	Event funds projected to be raised annually \$250K	
	For three years	\$750K
Subsidy for operating costs given to fundraising groups annually	\$30K estimate	
	For three years	(\$ 90K)
	Total potential event funds raised	\$660K

XV. Potential Events Described (All events should accent parish/GIFT values and culture)

(The brackets after each event title contain estimates as follows: [total funds raised during campaign / volunteers needed / number of times event is repeated / event duration].)

1. GIFT Fanfare (October 2008) [\$10K / 15 / 1 / one-day event]
 - Symbolic opening of public phase of campaign to congregation that demonstrates the potential results accomplished by GIFT campaign and PLC construction.
 - When: between Sunday masses – accent attendance at mass before event
 - Why: to educate the congregation; to build support for the campaign
 - How:
 - To be determined by Marketing Committee
 - Participants would be given the opportunity to pledge, match pledges, and volunteer for events in addition to participating in the ceremony.
2. No Cash Campaign [\$800K / 20 / 3 / three year event]
 - Coordinate pledge and electronic debit system for purchase and use of gift cards for all purchases for three years
 - With an average 5% rebate on grocery gift cards and 1000 parish families participating at \$500 per month, this strategy will provide \$300K per year.
 - With effective marketing and implementation, this idea can earn far more than projections
 - The best part of this idea is that it costs parishioners NO spendable income and can actually add spendable income in the form of gasoline discounts.
3. Hoops contest [\$20K / 10 / 3 / two-day events]
 - Details to be arranged – conducted on SFC grounds
 - Accents family and fellowship by having segments of the competition be family teams
 - External participation is encouraged. This provides dollars from the community.

4. Parish Wall [\$60K / 2 / 1 / 2 year duration]
 - Parish members are encouraged to list named bricks for SFC students, alumni, and teachers, living and dead, to honor their participation in SFC.
 - Accents Faith, Family, and Fellowship

5. Donor dinners [\$70K / 20 / 1-3 / one-day events]
 - Potential donors of \$5K-\$10K attend a semi-formal dinner with entertainment.
 - Large pledges of \$25K-\$50K that requires matches are announced with fanfare.
 - Attendees make public pledges on a computerized touch-screen for evening goals of \$25K-\$50K.

6. Celebrity events [\$25K / 20 / 3 / one-day events]
 - Auction of items from Steelers, Pirates, local and national celebrities at wine tasting party
 - Silent auction items are available
 - Accents Fellowship
 - Celebrities and athletes are occasional auctioneers

7. Auction of donated services and material goods [\$25K / 10 / 3 / two-day events]
 - Goods, certificates and services from surrounding businesses are auctioned on line, via phone, and live over a two week period with a culminating party to announce the winning bids
 - Bonus items are awarded to winning bidders who are present for the party.
 - Special prizes are awarded via drawing to live bidders

8. Student dollar boxes [\$60K / 5 / 3 / one month event]
 - CCD Students are challenged to obtain \$100+ in each of two school years.
 - A plaque names the participating CCD class members in the gymnasium.
 - Students are paid for chores at home for this month

9. Adult sock hops in Oldenski Hall - "Fruggin' at the Ferd" [\$5K / 4 / 3 / one-day events]
 - Disc jockeyed dance with prizes for event dancing
 - Instructions given in how to dance special dances
 - Dress-up in 60's and 70's style clothing
 - Special costume clothes on-sale at the event

10. "Senior" prom [\$6K / 25 / 3 / one-day events]
 - CCD-sponsored formal dance of middle school students with senior parish members
 - Semi-formal event with corsages and bouquets from the students to the senior guests
 - Business sponsors with door prizes
 - The value of this prom is more as a "fun" raising event than it is a fundraising event.

11. Church Festival [\$300K / 200 / 3 / 4-day event]
 - Modifications to existing festival proposed (carnival rides)

12. Nationality Festival [\$6K / 20 / 3 / 1 day event]
 - Celebrate the diversity of the parish with ethnic foods and entertainment
 - Indoor and outdoor event

13. GIFT Wellness Walk or Run [\$10K / 5 / 3 / 1 day event]
 - Participants gather for a five kilometer run or a mile walk for GIFT principles
 - Conducted around Parish perimeter
 - Encourage wellness principles
 - Non-parish participants are encouraged

14. Winter Ferd Feast [60K / 20 / 3 / 1 day event]
 - Formal dinner at golf course restaurant or country club
 - Silent auction
 - Gift baskets
 - Fifty-fifty raffles and reverse raffles

15. Golf outing [\$75K / 10 / 3 / 1 day event]
 - This project brings in support from businesses who want to entertain clients.
 - Much of the proceeds come from business sponsorships of event elements.
 - If a favorable relationship can occur with a caterer, the event is a better fundraiser.

16. New Year's Eve celebration [\$10K / 5 / 3 / 1 day event]
 - This also is more of a "fun" raiser than fundraiser, but such events are great because they allow the parish to get together without feeling that they will be solicited again. Relief from the campaign will re-bond the Parish during a stressful, three-year period.

17. Offertory Surplus [\$60K / 1 / reminder each of three years / three years]
 - Part of Pledge Sunday requests will be for a 10% increase in giving or a request for a minimum of \$10 per offertory.
 - With an average of \$5.42 per parishioner last year, this strategy could be substantially more successful if it is well-received.

Projections: Over three years, the events listed above, if adopted, are projected to raise \$1,602,000 above the amount raised through direct requests of pledges and gifts.

XVI. Pastoral Council Approval

Rate this strategic plan for the following factors:

Clarity: Is each section of the message clearly stated?

Feasibility: Could/would SFC muster the resources to support this GIFT campaign strategy?

Appropriateness: Does this campaign fit the culture and interests of the SFC parish?

Need: Is the plan compelling as stated? Are the sub-goals in each event attainable?

Events: Are the events ones that will be acceptable and well-attended?

I recommend that more work be done on the following sections or events:

<u>Section</u>	<u>Rationale for reworking section or event</u>
_____	_____
_____	_____
_____	_____

Comments:

As a member of the SFC Pastoral Council, I approve this strategic plan and agree to support the campaign to the entire parish through my work and contributions.

Name Printed

Date

Signature