



# SPECIAL EVENTS & CAPITAL FUND CAMPAIGNS

# Special Events & Capital Fund Campaigns

**I**n this document are a few selected ideas, principles, and outlines for conducting church special events and capital fund campaigns. Due to the potential volume of material and consultants on these topics, our goal here is to give you some general guidelines and help get you started.

## Special Events

**S**pecial events can be for any number of projects or needs from an annual stewardship campaign, raising money for a missionary trip or to providing scholarship money for high school students to attend summer camp. They can be church-wide in scope, or within a special ministry of your church. It usually is a smaller event rather than a large capital improvement campaign, and may last only a few weeks. It may only involve a special dinner to make a presentation. The types of special events may be:

- ❖ A banquet at the end of a period of promotion is the most labor/time intensive event, but can expose your whole congregation to your fund-raising event.
- ❖ A “briefing” over lunch or dinner, by special invitation is much easier to plan and can vary in size. Keep it under 30 people.
- ❖ Home gatherings, very small and intimate with one host, are easiest to plan, and they are the most informal.
- ❖ Collection “cans” distributed to families to put their excess change in each day.
- ❖ A matching gift program where the church seeks special gifts to match a pre-committed gift in order to double the final gift. For example, a major donor in the church gives £10,000 as seed money toward a special project in order to encourage young people and families raise £10,000, making the total gift £20,000.

**E**xperience has shown that, over time, as a church implements a Stewardship Ministry, they will not have to rely on special events every time they need money for special projects. They will not have to put so much effort into their special events. This is because as the people grow in their intimacy with God their stewardship discipleship and giving commitment will grow. Their giving will be systematic and just a solid and exciting report on a given ministry opportunity and request to fund it will be enough.

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## Putting the “Special” into Special Events <sup>1</sup>

At least **five key elements** can be found in successful special events:

1. Events, like the organizations that sponsor them, must have a **clear mission**. It’s imperative that the planning committee and staff are focused on the objectives for:
  - ❖ Attendance—Who and how many do we want to attend?
  - ❖ Outcome—What are we trying to achieve?
  - ❖ Audience involvement—What do we want people to do?

The best special events make the purpose of the occasion very clear to the invited guests, whether it is to raise funds, introduce people to a new program, or present a new opportunity for their involvement.

2. **Timing**, as they say, is everything. Event lasting longer than two hours is likely to lose its impact. The difference between a two-hour program and a two-hour and thirty-minute program can often result in thousands of dollars of unrealized revenue. People are extremely time-conscious, very busy in their daily lives and their family commitments. When event managers honor their guests’ time constraints by beginning and concluding their events on time, attendees will appreciate it, and respond to solicitations accordingly.
3. There must be clear **communication** with the guests regarding the purpose of the event. No one likes to be surprised, and most people are already suspect of fund-raising efforts without aggravating the situation with a murky message about the true reason for the event.
4. **Motivated, trained volunteers** are the best help. The best special events involve dozens of volunteers. People come to, or avoid, events because of who invites them. We insist that it should be friends inviting friends to a location that has the feel of someone’s living room, rather than an impersonal meeting room.
5. **Quality** is mandatory in all aspects of the event. By that I mean:
  - ❖ Attractive and error-free printed materials
  - ❖ An excellent video or multi-media presentation
  - ❖ Good food
  - ❖ A first-class location
  - ❖ An outstanding program

**W**hen you combine these features with hosts who are committed to your cause and a staff that produces an outstanding program clarifying your mission, your event will validate your commitment to quality and help achieve your goals. Special events should be exactly that, special. Doing them right is a matter of planning, attention to detail and good oversight, not chance. The rewards—for both audience and organization—are well worth the effort.

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<sup>1</sup> Don Goehner, president of Goehner Resource Group, San Jose, CA; Article in the Spring 1997 issue of their *Resource Concepts* newsletter. Used by permission.

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# Eight Planning Components for an Effective Annual Stewardship Campaign <sup>2</sup>

## 1. **Creating Vision**

- ❖ What is the scope of ministry of our congregation for the upcoming year?
- ❖ What excites us?
- ❖ What will excite other members and friends about the ministries of our church?
- ❖ What are the distinctive elements of our church?
- ❖ How will we emphasize them during the coming year?

## 2. **Gathering Information**

- ❖ What does the congregation need to understand in order to make informed decisions about their support of the ministries of the church?
- ❖ How will the necessary information be gathered, and how can it be conveyed to both the heads and hearts of members and friends of our congregation?

## 3. **Establishing a Theological Foundation**

- ❖ How will Scripture inform us to grow as stewards of the resources God has given to us?
- ❖ What is the particular biblical passage, story, or verse upon which the campaign will be built that will give the endeavor faithful relevance and focus the thrust and vitality of the campaign?
- ❖ Is there a biblical truth that can become a viable theme of the campaign or framework for it?

## 4. **Planning our Intensive Phase**

- ❖ How will the information about the projected ministries of the congregation be communicated in ways that are personalizing and that emerge from our theological foundation?
- ❖ What time period will be our primary, intensive phase of the emphasis? What needs to be done prior to that in order to have maximum impact during the intensive phase?
- ❖ How will members and friends be invited to respond and make their commitments?
- ❖ What reluctance can we expect from members of the congregation, and how will we address those issues?
- ❖ What questions do we anticipate, and how will we answer them?

## 5. **Mobilizing Our Resources**

- ❖ Who will need to do what and when in order to implement the process we have devised?
- ❖ How much will it cost, and how will it be paid for?
- ❖ What system of accountability will we have to assure that tasks are completed on schedule and that costs are within our guidelines?

## 6. **Conveying Inspiration**

- ❖ What will inspire members and friends to engage in the campaign, to devotedly reflect and discern how God would have them respond in commitment?

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<sup>2</sup> Sanford D. Coon, Notes from his workshop at the 1998 Christian Stewardship Association Annual Conference.

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### 7. **Anticipating Celebration**

- ❖ How will we bring joyful, celebrative completeness to our endeavors that will be appropriate to the culture of our congregation, authentic to our scriptural heritage, and inspiring to our congregation as a whole?

### 8. **Remaining Thankful**

- ❖ How will we acknowledge every commitment made to the projected ministries of the church?
- ❖ Is our financial record keeping effective and efficient, or do we need to make changes before we begin our new fiscal year?
- ❖ How will we maintain the flow of current, accurate, motivational and legally compliant information about individual, family and congregational support throughout the year?

## Some Additional Ideas For an Annual Stewardship Campaign<sup>3</sup>

1. **Plan, Plan, Plan!** An Annual Stewardship Campaign requires foresight and planning. Hastily concocted campaigns tend to produce limited or disappointing results. An effective campaign is developed simultaneously on many fronts so that the congregation is informed, primed and ready to make their commitments because of weeks of prayerful congregational, familial, and personal preparation.
2. **Listen to the Professionals.** Keep it positive, biblical, and stress the mission.
3. **Determine the Best Season for Your Campaign.**
4. **People give to Ministries, not Budgets.** Emphasize ministry awareness and challenge growth in faithful stewardship. Tell stories of what God is doing.
5. **Prepare a Narrative Budget.** A narrative budget describes the ministries of the church in an informative and inviting way. It describes in “humanizing” fashion how the church is fulfilling its God-given mission.
6. **Show Your Stuff.** Schedule a Ministry Fair or Missions Fair. Present by videotape, slides, music and computer-generated graphics a multimedia presentation during morning worship.
7. **Involve People.** The more people that are involved in the planning and preparation of the Annual Stewardship Campaign, the more ownership there is for the campaign and its objectives.
8. **Plan Your Commitment Card.** Make it work for your situation.
9. **Let the Leaders Lead.** Invite them to make their commitment a few days prior to Commitment Day. Then, prior to or at the Commitment Day services, announce the total of the commitments being made by congregational leaders.
10. **Describe Ways Gifts Can be Made.** Encourage people to consider making their gift with appreciated stock or other types of planned gifts.

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<sup>3</sup> Dr. Michael Reeves, president, United Methodist Foundation of Louisiana.

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11. **Give a Final Report.** Following Commitment Day, allow an interval of about two weeks before giving a final report to the congregation.
12. **Interpret the Results.** Use some means to interpret the outcome of the campaign. Provide an overall percentage of growth in comparison to the previous fiscal year, and describe how the ministries and programs of the church will be strengthened and expanded as a result.
13. **Say Thank You.** A letter to each individual and/or family unit that has made a commitment can convey gratitude and verify the amount of the commitment and the intervals when it will be fulfilled, such as weekly, monthly, or quarterly.
14. **Insist on Accuracy of Records.** Before mailing anything, check and re-check that names, address, commitment amount and other information is accurate.

## Here are a few basic principles to follow when conducting a banquet or event

### 1. Networking

- ❖ Each table is a **circle of friends**, meaning that they have been invited by their friend, the table host.
- ❖ People attend because of **relationships**. Try to get your event supporters to invite their friends, not strangers. Their potential response to an appeal will be greater if their host demonstrates a commitment to the project or need.
- ❖ Emphasis on reaching new people. Have your table hosts seek to invite new people in the church, to get them involved.

### 2. Honest Personal Approach

- ❖ Honest explanation of purpose of banquet or event. People want to know and need to know the exact purpose. This prepares their hearts when they arrive.
- ❖ Personal invitation by letter **and** phone. Do not depend on people responding to a letter only. A few rare individuals will, but most will need that personal, verbal touch.
- ❖ Attempt to make the event personal. This just means to be yourself; create an atmosphere that demonstrates an honest, relaxed environment. This is another reason why you put friends of each host at the same table.

### 3. Emphasis on Quality and Brevity

- ❖ You need a quality location, quality meal, and a quality program.
  - ❖ Brevity of the event including the program is important. Prepare everyone involved in the program to ensure you stay on schedule.
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#### 4. **Commitment of Volunteers**

- ❖ You need committed volunteers for your ministry. Don't be so "hungry" for volunteers that you recruit individuals who are not 100% committed to your church ministry, project or reason for the special event. Go for quality over quantity.
  - ❖ Encourage volunteers to inform and challenge new friends. "Stretch" your volunteers to reach out.
  - ❖ Make sure your volunteers are educated in sound biblical stewardship. They need to be well informed and properly trained.
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## Capital Fund Campaigns

Here are some important ideas and principles to help you get started.

# 7 Keys to Conducting Successful Church Building Projects<sup>4</sup>

*Highlights of nationwide interviews with 15 churches that conducted successful building fund drives*

## THE IMPORTANCE OF INSTRUCTING AND INSPIRING

**LESSON #1—PROVIDE BIBLICAL TEACHING**: Most churches found that their people were in need of practical and inspirational instruction and encouragement in the areas of Christian giving and stewardship. Churches found it helpful and very important that these areas be taught from the pulpit by the Senior Pastor and/or an experienced stewardship speaker so that a proper spiritual tone and biblical basis was established for the drive.

**LESSON #2—INCLUDE PERSONAL TESTIMONIES**: A number of churches actively included personal testimonies during worship times from people who have experienced the grace of giving in their lives and/or who were specifically led by the Lord to become supportive of the expansion project. Written testimonies, handouts, and articles were also used to help encourage people in the spiritual aspects of their giving decisions.

**LESSON #3—AIM TO MAKE THE FUND DRIVE A RICH SPIRITUAL EXPERIENCE**: Many churches indicated that their expansion drives helped deepen people's faith and spiritual commitment (i.e., especially through the increased vision people received, the interaction people had with others during the drive, and/or their increased or sacrificial giving to the Lord's work at the church).

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<sup>4</sup> Brian Kluth, *Stewardship Resource Manual*, Christian Stewardship Association. Used by permission.

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SEVENTH-DAY ADVENTIST ASSOCIATION LTD -  
SPECIAL EVENTS & CAPITAL FUNDING PROJECTS  
THE IMPORTANCE OF IDENTIFYING & INFORMING

LESSON #4—HAVE A COMPREHENSIVE PLAN: Every successful funding effort had a specific plan on how they were going to instruct, inspire, inform and appropriately involve people within the following groups:

- ❖ **LEADERSHIP**: Pastors, staff, key leaders of ministries and committees.
- ❖ **ACTIVE MEMBERSHIP**: People regularly involved in serving in the church.
- ❖ **POTENTIAL MAJOR GIVERS**: People who exhibited the gift of giving in the past or who may have the potential to be a major financial help in the drive.
- ❖ **REGULAR ATTENDERS**: People who attend church at least twice a month.
- ❖ **FRINGE PEOPLE**: Occasional or sporadic attendees.

LESSON #5—GET EXPERIENCED HELP: In addition to the active involvement of many lay leaders and present staff, nearly all the churches that raised major dollars for expansion efforts used some level of experienced help to lead them through the funding process.

LESSON #6—DEVELOP HELPFUL COLLATERAL MATERIALS: Each church developed materials that effectively informed their congregation what the plans were and what level of help and support would be needed. Items often developed included multimedia presentations, case-statement brochures, question and answer flyers, personal presentation packets, commitment cards, mailings, and update sections in church publications.

## THE IMPORTANCE OF INVITING AND INVOLVING

LESSON #7—HAVE SPECIFIC COMMITMENT TIME(S): Following a period of advance instruction, inspiration and information, churches would invite their people to carefully and prayerfully indicate how the Lord has led them to be involved in the church expansion plans. In a number of cases this was done in two stages. The first stage would be receiving the commitments from the families that make up the church's main leadership and lead givers. The second phase (2-4 weeks later) would be receiving the commitments from the rest of the congregation on a specific target date or event.

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## *“How to Determine When Not to Build”*<sup>5</sup> - Church Building Projects

*Helpful questions for church leaders to consider*

<b>Answer the following questions about your church:</b>	<b>YES</b>	<b>NO</b>
1. The regular giving in our church is strong.	<input type="checkbox"/>	<input type="checkbox"/>
2. The giving units—individuals or families who give regularly—represent a majority of the congregation.	<input type="checkbox"/>	<input type="checkbox"/>
3. We consistently meet our budget, fully funding our ministries and staff needs.	<input type="checkbox"/>	<input type="checkbox"/>
4. Our budget includes adequate funds for intentional outreach to meet the needs of people in the community.	<input type="checkbox"/>	<input type="checkbox"/>
5. We teach biblical financial principles to our families and individuals, including an emphasis on biblical giving.	<input type="checkbox"/>	<input type="checkbox"/>
6. The church is out of debt.	<input type="checkbox"/>	<input type="checkbox"/>
7. Through the use of a building and funding survey we have found out that the present giving units are ready to commit themselves to an increase in their giving to cover the cost of construction and future building operation costs, so that none of the church’s present ministry spending would ever have to be diverted to help cover the costs of the new building.	<input type="checkbox"/>	<input type="checkbox"/>
8. The increased giving for future facilities is currently accumulating and is being wisely invested for a good return.	<input type="checkbox"/>	<input type="checkbox"/>
9. The church has enough invested in its building fund to be able to pay cash or almost cash for the proposed building program.	<input type="checkbox"/>	<input type="checkbox"/>

Following these questions, Ray Bowman says, “If you checked yes to the first 6 questions, your church is probably basically financially healthy, and by implementing numbers 7, 8 and 9 you should be financially ready to build within a few years. As soon as all nine statements are true about your church, you have then passed the financial readiness test and should proceed with your building plans.” (NOTE: Brian Kluth, past President of the Christian Stewardship Association, says that this is an

*outstanding book. He says, “No church leadership board should consider any major renovation or building plans before each board member reads this book!”)*

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<sup>5</sup> *Stewardship Resource Manual*, Christian Stewardship Association. Taken from church architect Ray Bowman’s book *When Not to Build*, Baker House Publishing, pp. 107-108.

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## Building Project Financing

### advantages of using prayerful planning and an orderly funding effort vs. long-term debt for building and expansion needs.<sup>6</sup>

In this article I would like to share with you some of the specific advantages I have experienced with ministries and churches that decided **NOT** to use long-term borrowing (mortgages or bonds) to fund their expansion plans. They worked in an orderly manner to inform, inspire, instruct, and invite God's people to help pray for and provide the necessary resources to meet their building and expansion needs.

1. More people will be better informed, inspired and involved in the project.
2. A greater number of people will make specific financial commitments to the effort.
3. There will be a greater number of large and generous gifts given to the fund drive.
4. It will be easier to raise funds for something you are going to do than for something you did. It is always more exciting when people can give to the dream vs. having to pay off the debt.
5. You will not endanger the future of your normal ministry. As the ministry does grow, you will be in a stronger financial position to add needed programs or to fund additional staff.
6. You will be a witness to your community and to unbelievers about the power of God to provide.
7. You will be in harmony with all the biblical examples of building projects in the Scriptures.
8. Other ministries who look up your ministry will be able to follow your model and example.
9. You will not be locked into any of the ups and downs of your city or country's economy.
10. You will not have to presume upon the future (things that you are hoping will happen or that will have to happen) in order to make required payments.
11. You will keep people more informed and there will be a greater need for prayer during times of specific need.
12. You will save hundreds of thousands of dollars in interest payments. For example, a 15-year mortgage at 10% interest requires you to pay £1 in interest for every building dollar you received!

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<sup>6</sup> Brian Kluth, past President Christian Stewardship Association, *Stewardship Resource Manual*. Used by permission.

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13. You will have an ideal opportunity to teach and model to your people what the Scriptures teach about matters of stewardship, finances, giving and building.
  14. People will be appropriately invited to make giving decisions according to the resources God has entrusted to them. These giving decisions will often result in an increase in their personal faith and trust in the Lord.
  15. There will be a greater level of faith, excitement, and anticipation of how God will lead and provide.
  16. The ministry's leadership will not have to violate the biblical principle of surety or cosigning (i.e., not having a "sure way" to pay, having to put up additional collateral, or the necessity for leaders to co-sign on the financing). This will keep you from becoming a slave to the lender.
  17. You will likely see more of God's "creative provisions and miracles" to meet the specific needs you'll face along the way.
  18. The project will be broken down into clearer stages and phases that have specific dollar needs that help people understand the importance and value of their gifts.
  19. More people (from inside and outside of your ministry) will be inclined to donate or discount needed items, labor and services.
  20. You will be more careful, prayerful, wise, and realistic about what items you should actually include in the fund drive.
  21. You will find that you put to better use the gifts, skills and experiences of the people God has put in your ministry.
  22. You will create long-term financial freedom for your ministry and you will not hinder your ongoing ministry or missions giving.
  23. You will not only gain people's treasure, you will gain their hearts. This will greatly strengthen the depth and breadth of the body life in your church.
  24. You will help more people make giving to the Lord a regular priority in their life.
  25. And best of all, you will never regret the decision you made to **NOT** use long-term borrowing for your building needs.
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**H**ere are some more principles to keep in mind when planning a campaign.

- ❖ Plan a feasibility study.
- ❖ A church that is healthy with a great mission and vision can expect to raise up to four times its annual budget over a 3-year period. For debt retirement it can expect to raise one and half to two times the annual budget over 3 years.
- ❖ A campaign is usually divided into two categories—the quiet phase (sometimes called the leadership phase) and the public phase. Most campaigns last 3 years, and it is anticipated through the quiet phase that at least 30%-50% of the needed amount in cash will be raised to lead the campaign into the public phase.
- ❖ The campaign needs to be based on prayer.

## Two Common Fatal Flaws in Failed Building Programs<sup>7</sup>

**FATAL FLAW #1 - FALSE ASSUMPTIONS.** Church leaders assume everyone else knows what they know, dream like they dream, believe what they believe, and conclude what they conclude.

**FATAL FLAW #2 - SHORTCUTS.** A building process can be long and arduous. Shortcuts will hurt you at three distinct points in the process.

1. **The Conception Stage**—A few people supporting the project may lead us to believe that everyone wants it. Take time for others to understand and support the project.
2. **The Planning Stage**—Plans make the project more specific. They answer questions and create the vision. They also become the target for objections and misunderstanding. Careful planning, professionally guided, can be a vital investment in the future success of the project.
3. **The Final Strategy Stage**—The financial plans for a building project will impact the church and its future more than the actual design of the building. A congregation left in disarray or in severe debt can have a crippled ministry for many years. An initial investment of time to plan the financial strategy for a building project will pay enormous dividends in the future.

*“Plans fail for lack of counsel, but with many advisers they succeed.”*(Proverbs 15:22)

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<sup>7</sup> John H. Hewett, Ph.D., executive vice president of Cargill Associates, Ft. Worth, Texas. Taken from notes given at a workshop at the 1998 Christian Stewardship Association Annual Convention.

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