



How to Know You're Ready For A Capital Campaign

7 Questions You Need to Consider Before You Begin

By Joe Park



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Introduction

Capital campaigns remain an important and viable vehicle for church leaders to utilize to inspire giving and achieve key ministry milestones. However, it's not something to commit to without carefully considering what will be required to evaluate, launch, and lead a successful experience that will produce the results you desire.

Whether you've done dozens of capital campaigns or you're considering one for the first time, it can seem daunting from every angle. If you are a volunteer leader on a church finance committee or generosity team that is considering a capital fundraising initiative, you might feel a little lost. That's okay.

This resource was designed for both the capital campaign novice and veteran. It is designed to help you reflect on three critical questions:

- Do I need a capital campaign?
- Is now the right time?
- Am I ready?

The following seven questions will enable you to evaluate how a capital campaign could help you turn ministry vision into reality.

If you have questions or just want a sounding board, Horizons is here to help. For more than two decades, we have worked with thousands of churches to help them sort through the available options and even discover some new ones. If you need an experienced ministry partner, we are available to assist you.

We pray this resource will be a useful tool in clarifying your direction and next steps. We can't wait to hear what God is calling your church to do next!



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7 Key Questions

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Question One: Do you have a clear, long-term vision with defined ministry outcomes?

Money follows vision. That is as true today as it has ever been. People want to be part of something bigger than themselves. That's why vision matters so much in any church-wide effort. Few people are motivated by financial metrics alone. For many people, your complex financial statements are just a bunch of numbers without any real substantive meaning. People are more likely to be motivated by mission and God-sized objectives. A capital campaign allows you to share your vision and invite people to become a part of achieving it.

But vision is more than just a set of desires, hopes, and dreams. Vision, to be attainable, must also have associated milestones that tell you whether or not you're moving toward your vision or away from it. When your vision aligns with your greatest ministry opportunities, you will find the clarity you need to determine whether or not your vision supports a capital campaign. A well-thought-out and strategic capital campaign will help make your vision come true.



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Question Two: Can you identify and quantify the ministry impact you'll experience if you're successful?

Once you are sure a capital campaign aligns with your ministry vision, next determine how a successful campaign would impact your capacity to do more ministry. Remember that people donate to organizations they believe are having a positive impact. So, for a capital campaign to be successful, you will need to tell your impact story.

Consider what your ministry will look like as a result of your expansion or renovation projects. What new opportunities for ministry will be available to you once your debt has been paid off? What will you be able to do after the capital campaign that you are unable to do now? Answering these questions will provide the insight needed to determine if a capital campaign is appropriate. Once you have clearly identified your future ministry impact, a case for support is developed as a guiding strategy for the entire capital campaign. It will outline the importance of your ministry expansion project, what the project will allow you to do as a result, and how lives will be changed because of your faithfulness to the vision and mission of your church.

This is a treasured time in the preparation phase of a capital campaign, because it is when the dreams, passions, desires, and hopes of a congregation come together in one document that clearly articulates—often for the first time—your impact potential.



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Question Three: Are you coordinating with the architect and builder to inform the capital fundraising needs?

As you're moving through the different phases of campaign evaluation and planning, you'll want to start getting input from an architect. Having a good idea of scope, costs, and timeline will help you accurately assess what you'll need to raise from your capital campaign. There are many variables that come into play when working with architects, builders, and contractors. It is important to share your needs and expectations as well as the parameters of the work proposed.

Often, churches will consult Horizons during this phase of the process. We can work with you and your architect to ensure everyone is communicating expectations clearly and consistently. Engaging Horizons early may help you avoid some of the unexpected surprises that may arise when a project cost substantially exceeds your ability to fund it.



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Question Four: Do you already have a broad base of support from church leaders and financial leaders?

There are three types of leaders in your church: staff leaders, volunteer leaders, and financial leaders. All three are very important, and all three should be in agreement if you want to fully fund your ministry expansion projects through a capital campaign.

Aligning your staff around the vision and mission of the church may sound simple, but if they are not supportive, it can be an early indicator that other leaders are also not aligned with your capital project. It's also important that your volunteer leaders are ready to support the campaign. There is a strong statistical correlation between volunteering and giving. If those who are already deeply investing their time and money in your church aren't supportive of your effort, it will be challenging to make up that gap from others in your church.

Last, make sure your financial leaders are in agreement with you. Financial leaders are those who have chosen to invest heavily in the ministries of your church. Because of their extraordinary generosity, you want to get their feedback and input into the capital project and how they believe it aligns with the ministry and vision of the church.

When you have all three leadership groups in agreement and fully aligned, the possibilities of a successful campaign are high. When you don't, it can be a difficult path forward. You want any capital campaign to be a favorable experience for everyone involved.



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Question Five: Have you intentionally tested your ministry plan with different segments of your church?

When you're ready, start exposing different groups within your church to the messaging from the case for support. You need to know it resonates with them just as much as it resonates with you. This often happens in two ways: small and large group gatherings.

There are many different ways to do this—on Zoom, at the church, or in people's homes. These gatherings will offer you the chance to hear from a broad base of people and get their thoughts, opinions, and feedback. You'll also get better and better at sharing your compelling vision.

Few people like to be told what to do. When others are invited into the planning process and allowed to offer feedback and ideas, something interesting happens. They start to see themselves as collaborators rather than passive participants. This will have significant implications when it comes time to ask them to consider making a financial commitment.



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Question Six: Are you working from a project plan to make sure you come in on time, on budget, and as expected?

A capital campaign requires a tremendous amount of coordination. If you don't have the people, plans, and project milestones aligned, you may get started on the wrong foot.

Having a clear action plan not only helps you stay on track, it also helps you manage the unexpected twists and turns that are bound to come up along the way. Try tailoring the plan to your church's culture and matching it up with how your paid and volunteer staff will coordinate throughout the capital campaign process.

This step is often dismissed as overly complex by those who have participated in a capital campaign before, or unnecessary by those who've never experienced one. Both extremes fail to account for the time, energy, and direction necessary to ensure a successful result.



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Question Seven: Are you prepared to commit the resources and effort to keep people engaged throughout the fulfillment process?

The planning process and commitment Sunday are just the beginning. The effort continues through the fulfillment process. Your goal is to keep the vision alive and everyone engaged. You want to enroll new members in the capital giving process, follow up with those who made pledges but have fallen behind in giving, and celebrate with those who are on track or ahead of their pledges.

The fulfillment process requires diligence and persistence which can be difficult following a capital campaign. The church leadership has often spent one to two years deliberating about a capital campaign and has invested six months into the planning and launch process. It can be hard to stay focused for another 30 months, yet it's essential for success. Again, Horizons' capital campaign process includes our dedicated attention to guide you through the entire giving period successfully.

From day one, if you're committed to see it through, the right leadership, systems, and processes can turn the daunting idea of a capital campaign into a catalyst for spiritual growth, ministry expansion, and life change. It's so much more than just a financial effort, and we can't wait for you to discover and experience that for yourself.



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Conclusion

Thinking about and praying through new ministry opportunities is exciting! A successful capital campaign can open doors to incredible growth and transformational ministry. You can take comfort in knowing that many have gone before you and seen great ministry take place as a result of a capital campaign. If you're a little overwhelmed, that's okay too. Just remember you don't have to do this alone.

Horizons brings a unique and proven framework approach to working with churches. We believe it's critical that every ministry expansion opportunity be custom fit to the culture of your church and the context in which you do ministry. We accomplish that by beginning with an intensive listening process supported by data-informed assessments that indicate what possibilities might be true for you.

Building on that, we then work collaboratively to integrate best practices and our collective professional experiences to arrive at a road map that will ensure you live into your God-inspired vision. As we walk with you from the planning phase through fulfillment, we'll be there to ensure this is a positive experience for your people and it has a lasting impact on your church. Many of our clients experience a sustained positive impact on their annual giving after having worked with Horizons on a capital project.

Feel free to share this resource within your church or with whomever you think might benefit from it. We believe that churches that take the time to discern their capital campaign needs will also see God at work in and through their ministry expansion projects.

A capital campaign can be a very powerful ministry tool that organizes the church around a key ministry opportunity and refocuses the work of the local church around life change and impact. This is a time when you'll see the work of discipleship take place right before your very eyes as new members join the effort, current givers fulfill their commitments, and financial leaders commit to transformational levels of giving. With the right planning—along with a trusted and experienced guide—a capital campaign will accelerate you toward your full ministry potential.



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About the Author



In 2002, after a career that saw him rise to be the CEO of a rapidly growing bank holding company, Joe followed God's leading into full time ministry by joining Horizons where God has used his keen financial and leadership skills with his heart for the Gospel to help Horizons guide congregations to invest billions of dollars into ministry. Joe is committed to the belief that biblical generosity is a result of prayer, a grateful heart and effective discipleship practices and he leads the Horizons team that develops and implements campaign and ministry strategies following these guiding principles.

In addition to capital campaigns, Joe actively assists churches in the implementation of best practices in developing generous congregations, vision discernment, discipleship, managing change and systems development.

Joe earned a bachelor's degree in Banking and Finance from the University of Arkansas and a master's degree in Business Administration from Boston University. Joe and his wife, Reverend Lisa Greenwood, share seven children.



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About Horizons

Horizons Stewardship helps church leaders make disciples and fund ministry through a collaborative framework that is tailored to the unique culture of the church, aligned with the senior leader's vision, and implemented through coaching, planning, technology, and analytics to ensure the church lives into its full ministry potential and impact.

Here is how we are helping church leaders lead with confidence and live into their full ministry potential:

Annual Giving

- Discovery Assessments
- Ministry Plan Communications Strategies
- Year-Round Generosity Planning
- Church Analytics and Dashboards

Capital Giving

- Potential and Possibility Studies
- Coaching and Implementation
- Fulfillment Programs
- One Journey Experiences

Special Giving

- Financial Leader Ministry Planning
- High Capacity Donor Identification and Development
- One Sunday Initiatives
- Outreach and Missions Funding

Planned Giving

- Planned Giving Education Experiences
- CPI Assessment (Capacity, Propensity, and Interest)
- Endowment and Foundation Planning
- Legacy Giving Communication Strategies

Learn more about how Horizons Stewardship is inspiring next level generosity through congregations and communities across the country through a deeply integrated, spiritually focused approach that is leading to more money for ministry and more effective disciple-making strategies.

