

VisionWorks Fundraising Capital Campaigns at a Glance!

Dear Friends,

In 2023 we are seeing the encouraging signs of churches re-gathering, long-term plans being made, and capital campaigns. And though Covid was tough for all of us, we saw our best campaign ever in the worst of times (as we usually do), the \$12M+ Omaha St. Wenceslaus campaign for a new \$32M, 1,400-seat church!

These days, more than ever, it is critical that church campaigns be successful. And when churches need successful campaigns, they turn to VisionWorks Fundraising. With you we are growing the Kingdom of God and extending God's work across the country.

Where other fundraising companies base their work on raising 2X churches' yearly offertory/Sunday income (annual offertory income – AOI), VisionWorks campaigns are based on raising 3.5X to 7X AOI. This is significant! Some recent examples are:

- St. Wenceslaus, Omaha - 3.6X AOI - \$3.3M AOI, \$12M+ campaign result
- Christ the King, Milwaukee - 4X AOI - \$1.2M AOI, \$4.7M campaign result
- St James, KCMO - 4.6X AOI - \$1.2M AOI, \$5.5M campaign result
- St. Elizabeth, KCMO - 6X AOI - \$900K AOI, \$5.5M campaign result
- Holy Trinity, Wisconsin - 6.6X AOI - \$500K AOI, \$3.3M campaign result
- St. Andrew, Wisconsin - 6.8X AOI - \$125K AOI, \$850K campaign result

With VisionWorks Fundraising's guidance from beginning to end and our track record, you will receive the most successful, highest-yielding fundraising campaign possible. Contact us today with your 2023 fundraising questions and needs.

Sincerely,

Mark Filips

VisionWorks Fundraising, President

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TABLE OF CONTENTS

Greetings from Mark Filips	1
Who Is VisionWorks Fundraising?	3
How Much Can We Raise?	4
How VisionWorks Outperforms Other Companies	5
VisionWorks Services to You	6
Feasibility Study and Capital Campaign	
• Importance	7
• Phases Explained	8
• Sample Campaign Calendars	9
References	11
Nine Elements of a Successful Capital Campaign	12
Pastor's Role in a Capital Campaign	13
How to Start a Capital Campaign	14
Some Additional Thoughts	15



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WHO IS VISIONWORKS FUNDRAISING?

- **Catholic professionals** who have worked on the staffs of Catholic parishes and schools doing stewardship, development, and fundraising.
- Specialists in helping churches and schools turn their visions and plans into reality through strategic planning, increased offertory programs, capital campaigns, and foundation building.
- An experienced team that has directed hundreds of parish and school capital campaigns and fundraising efforts.
- **Mark Filips has directed 310 capital campaigns** and advised on another thousand capital campaigns.
- **A group that outperforms other Catholic fundraising companies by raising 3.5X to 7X annual offertory income (AOI) while other companies raise 2-2.5X AOI.**

HOW MUCH CAN WE RAISE?

As many churches and schools start to think of capital campaigns for all kinds of projects (new churches, additions and expansions, campus renovations, debt repayment, various funds, etc.), the question arises: HOW MUCH CAN WE RAISE?

Ordinary fundraising companies can raise 2-2.5X a church's annual offertory income (AOI). All companies base their work, and therefore their fees, on this.

VISIONWORKS FUNDRAISING'S track record is that of raising 3.5X to 7X churches' AOI!

For instance, if a church's AOI is \$1.5M, an ordinary company might raise \$3M to \$3.5M. In VisionWorks campaigns, we have raised \$4.5M to \$10.5M. This is significant, especially if a church's fundraising is critical or a diocese has certain financial thresholds to reach.

So, how much can a VisionWorks Fundraising campaign raise for us? There is a hierarchy of enthusiasm for different visions/cases/projects. Very generally, we have raised these kinds of sums:

- New church, school, parish hall – 3.5X to 7X AOI
- Land purchases – 3X – 4X AOI
- Significant new additions, major renovations – 3X – 6X AOI
- Scholarships, tuition assistance, new programs – 3X+ AOI
- Debt reduction – 3X to 4X AOI
- Endowments – 3X AOI

VisionWorks' success is based on 1) Inspiration (God-sized dream for the church), 2) Method, 3) Stewardship Preaching, and 4) Exceptional Major Gifts work. But the DIFFERENCE MAKER is our MAJOR GIFTS EXPERTISE!

If a church needs to go over 2X AOI, that overage will come from major gifts. VisionWorks' major gifts efforts are twice the size of other companies and have twice the financial goals of other companies. This is what enables us to surpass other companies fundraising results. In a VisionWorks campaign, the major gifts tier provides 35% to 65% of the financial result. Attention to major gifts makes all the difference in the world!

VISIONWORKS OUTPERFORMS

VisionWorks Fundraising raises 3.5X to 7X AOI for churches while other companies raise 2X to 2.5X AOI. We do this through **inspiration** (God's big picture), **three-fold stewardship messaging, outsized major gifts efforts**, and our **comprehensive method** (big teams, lots of involvement, over-the-top lead (major) gifts effort, focused communications and reflection, plenty of pledging opportunities, and a detailed pledge collection plan and effort).

Some examples of VisionWorks' outperformance are:

Christ King Church, Milwaukee – A beautiful, 1,200-household parish in Wauwatosa-West Milwaukee wanted to renovate its 80-year-old church and campus. Previous campaigns conducted by other companies yielded a maximum of \$1.6M each. Their VisionWorks yielded \$4.7M!

Holy Trinity Church – A Wisconsin church of 850 households and a \$500K annual Sunday income wanted to build a new Parish Center. Holy Trinity's two previous campaigns were run for \$600K and \$650K. The VisionWorks campaign yielded \$3.3M (over six times its AOI).

St. James Church – A Kansas City, Missouri church of 2,000 households wanted to build a new 1,200-seat church. St. James' first campaign with another company raised \$3M in financial pledges, which was not nearly enough to begin. Since then, VisionWorks has conducted a 2015 campaign that raised \$5.6M, a 2016 match campaign that raised \$2M, and a 2019 campaign that raised \$4.7M. St. James' new \$13M church, social hall, and offices were dedicated in the fall of 2019 and are in use today.

St. Elizabeth Ann Seton Church – A Plano church of 4,000 households needs a larger, lasting church totaling \$16.5M. Their just-completed VisionWorks campaign yielded \$10.1M+, giving them enough money to break ground on their new, 1,100-seat church.

St. Wenceslaus Church – A growing church in West Omaha needed to build a new 1,400-seat church and office complex but ran into trouble over funding concerns. A \$10M gift and a previous campaign yielded \$6.5M and helped them to get started. The last company predicted a second campaign could raise only \$5M to \$6M (2X AOI). The Finance Committee hoped they could raise \$7M. As all the authorities began to balk, Fr Bauwens turned to VisionWorks and Mark Filipis. VisionWorks and Fr Tom knew St Wenceslaus could do better. Filipis predicted they could raise \$10M-\$12M. On July 1, 2021, the day of the St Wenceslaus dedication, St Wenceslaus reached \$12M --- during Covid! Our best campaign ever!

VISIONWORKS SERVICES TO YOU

At VisionWorks, we outperform other capital campaign companies by:

- 1) **Refining** your vision or **case statement**.
- 2) **Making this a journey of A) prayer, B) that involves maximum numbers of leaders and volunteers to energize the parish, and C) that increases the culture of giving.**
- 3) **Reconnecting with key donors** and establishing high **financial goals**.
- 4) **Designing** an optimal **campaign calendar**.
- 5) **Recruiting the Steering Committee** and training the Steering Committee for their campaign tasks.
- 6) **Meeting with the Steering Committee (chairpersons and each team) and staff throughout the active phases of the campaign** (every three to four weeks) and whenever necessary by Zoom, phone, or email.
- 7) Providing **specialized campaign training manuals** for each team and providing **clear and simple instructions** weekly and monthly to the end of the campaign.
- 8) **Assisting or designing all print materials used for the campaign.**
- 9) **Providing prayer samples, announcements, and talking points/sermons** for the public and commitment phases of the campaign.
- 10) **Building a strong Lead/Major Gifts Team** to identify and approach the first and largest donors to the campaign.
- 11) **Preparing a detailed Pledge Fulfillment Plan** for three or four years of pledge collections.
- 12) Providing **pledge fulfillment counsel** for three years, at quarterly intervals through visits, videoconferencing, or phone calls. **Implementation of a good Pledge Fulfillment Plan can see 100% to 125% of pledges, or more, collected through FOUR key follow-up strategies.**

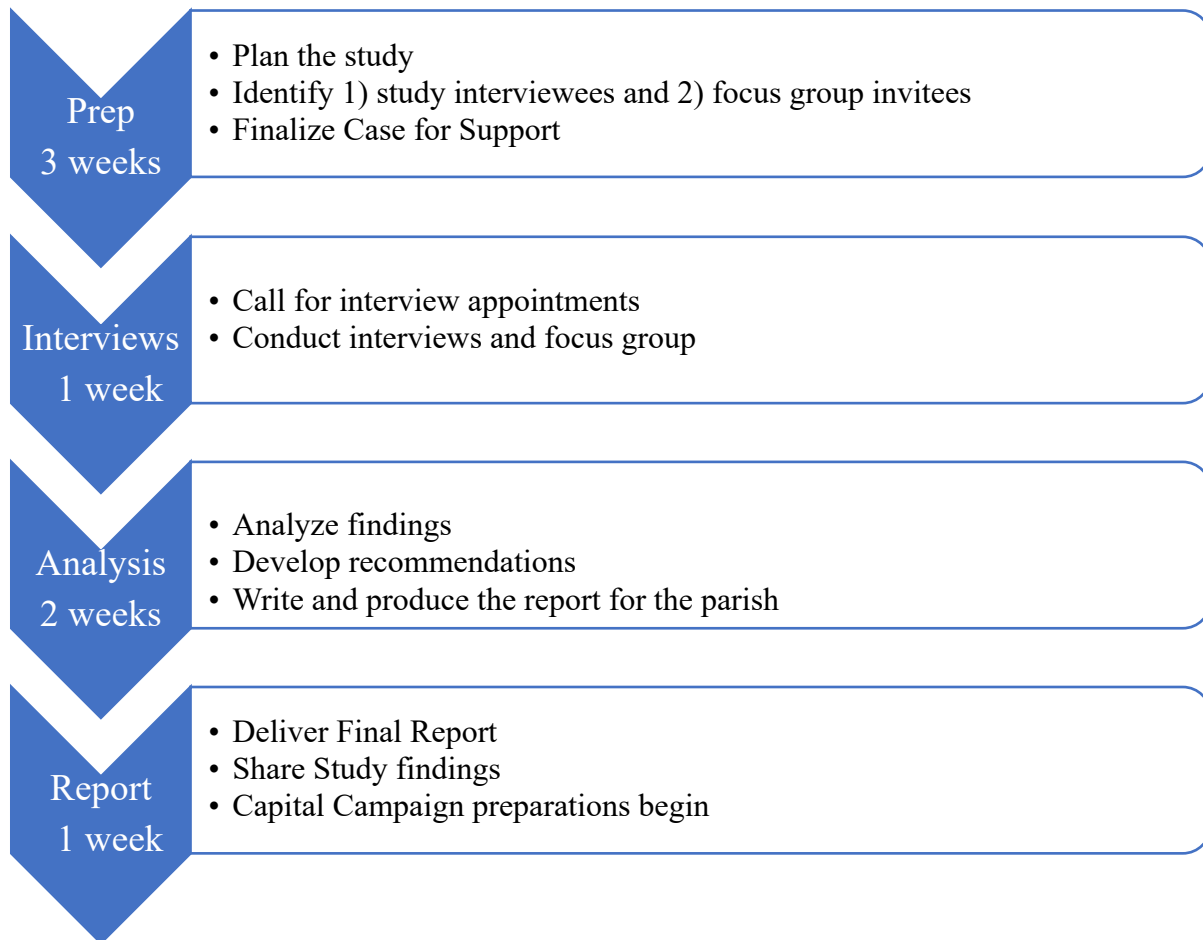
FEASIBILITY STUDY - IMPORTANCE

A VisionWorks feasibility or planning study (study) tests the parish's vision/case/plans for a financial response. Through a process of personal interviews (with key donors) and focus groups, we can determine how well parishioners will support the capital campaign. Just as importantly, seeds are planted in the hearts of key donors, and **\$100,000 ideas can turn into \$500,000 pledges, and \$1,000,000 ideas can turn into \$2,000,000 pledges.** Prayer and time always work in your favor!

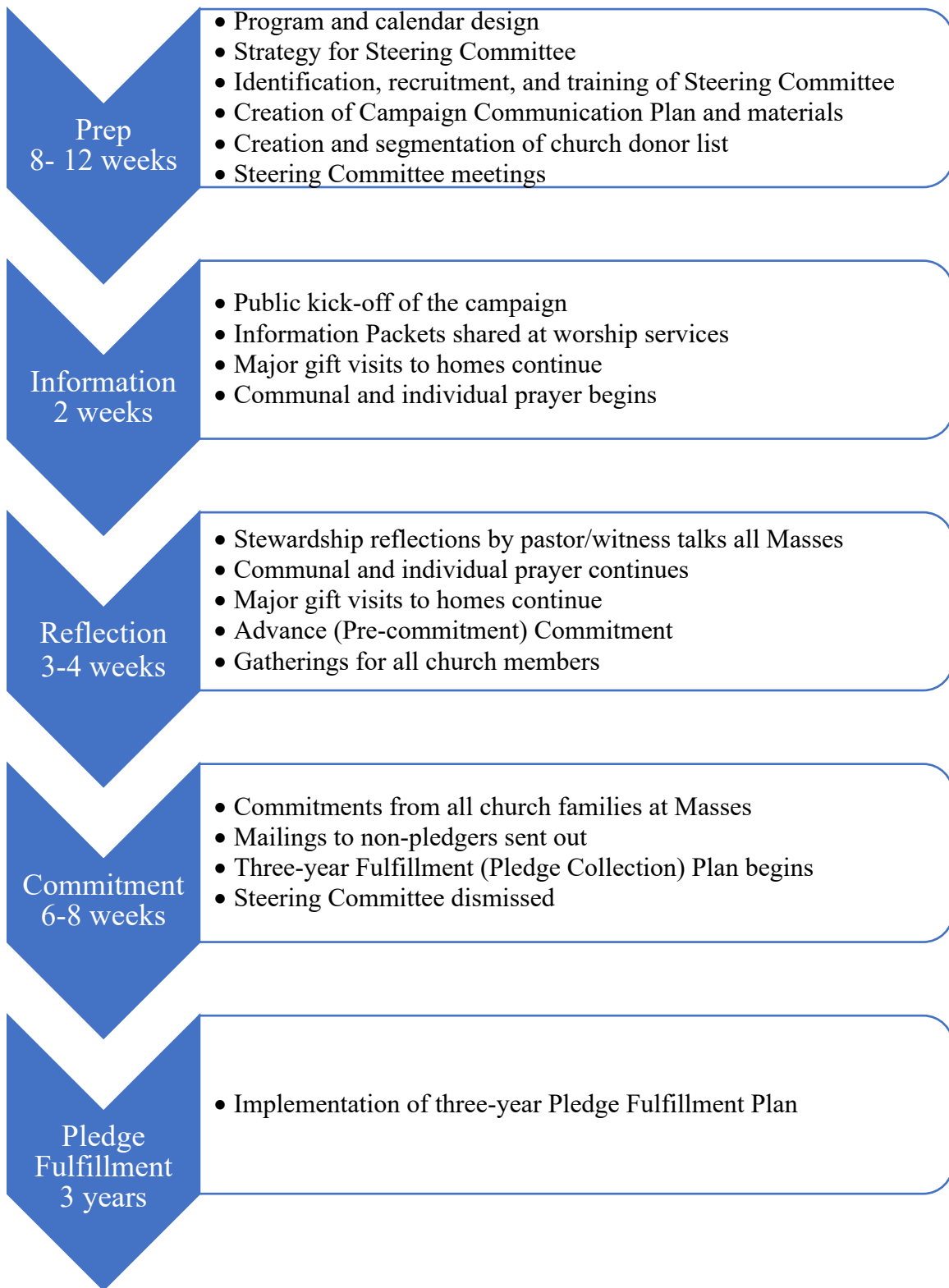
A study will help you:

1. **Strengthen relationships and raise the financial sights of major donors.**
2. **Assess parishioner opinions** of the vision/case/plan.
3. **Set realistic yet aggressive financial goals.**
4. Communicate and pre-sell your case to **parish leaders.**
5. Surface the names of **campaign steering committee members.**
6. Discover dates to **create an optimal campaign calendar.**
7. Create **excitement.**
8. Instill a **sense of gratitude.**
9. Instill **greater peace of mind** in the parish leaders.

PHASES



CAPITAL CAMPAIGN PHASES EXPLAINED



SAMPLE (I) FALL 2023 CAMPAIGN CALENDAR

(This is ONLY a sample calendar. All calendars are created with the pastor and parish staff.)

January 2023	Decision to begin the Study and Campaign
February-March	Feasibility-Planning Study – 6-8 weeks
March-April	Steering Committee Recruitment
May	Steering Committee Training
Late May	Steering Committee Training – 2 Days
June	Report 1 (2 days)
July	Report 2 (2 days)
August	Report 3 (2 days)
Late September	Report 4 (2 coinciding w/ Advance Commitment Gatherings)
Late October	Report 5 (1 Day)

Early August to October 27 - Silent Lead Gifts Phase

September 9-10	- Information Weekend I – Kick-off of Campaign – Information Packets after Liturgies
September 16-17	- Information II – Parish Video at Liturgies
September 23-24	- Inspiration (Reflection) Weekend I – Acknowledging God’s Gifts
October 7-8	- Inspiration (Reflection) Weekend II – Being Grateful
October 14-15	- Inspiration (Reflection) Weekend III – Giving Back to God
October 21-22	- Inspiration (Reflection) Weekend IV – Giving Back to God, with Sacrifice

September 28, 29 - Advanced (Pre) Commitment Gatherings (Parties)

October 28-29	- Major Commitment Weekend I – Commitments at homily time
November 4-5	- Major Commitment Weekend II – Commitments at homily time
November 11-12	- Minor Commitment Weekend III
November 18-19	- Minor Commitment Weekend IV
November 25-26	- Minor Commitment Weekend V
December 2-3	- Minor Commitment Weekend VI
December 9-10	- Minor Commitment Weekend VII
December 16-17	- Minor Commitment Weekend VIII

January 2024	- Celebration (Closing Social) Weekend – Results announced
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SAMPLE (II) WINTER-BRIDGE 2023-24 CAMPAIGN CALENDAR

(This is ONLY a sample calendar. All calendars are created with the pastor and parish staff.)

April 2023	Decision to begin the Study and Campaign
May-June	Feasibility-Planning Study – 6-8 weeks
July	Steering Committee Recruitment
August	Steering Committee Training
September	Report 1 (2 days)
October	Report 2 (2 days)
November	Report 3 (2 days)
January	Report 4 (2 coinciding w/ Advance Commitment Gatherings)
February	Report 5 (1 Day)

Early November to February 10 - Silent Lead Gifts Phase

December 3-4	- Information Weekend I – Kick-off of Campaign – Information Packets after Liturgies
December 10-11	- Information II – Parish Video at Liturgies
December 17-18	- Information III – Parish Video at Liturgies
January 14-15	- Inspiration (Reflection) Weekend I – Acknowledging God’s Gifts
January 21-22	- Inspiration (Reflection) Weekend II – Being Grateful
January 28-29	- Inspiration (Reflection) Weekend III – Giving Back to God
February 4-5	- Inspiration (Reflection) Weekend IV – Giving Back to God, with Sacrifice

January 18, 19 - Advanced (Pre) Commitment Gatherings (Parties)

February 11-12	- Major Commitment Weekend I – Commitments at homily time
February 18-19	- Major Commitment Weekend II – Commitments at homily time
February 25-26	- Minor Commitment Weekend III
March 4-5	- Minor Commitment Weekend IV
March 11-12	- Minor Commitment Weekend V
March 18-19	- Minor Commitment Weekend VI
March 25-26	- Minor Commitment Weekend VII

May or June 2024	- Celebration (Closing Social) Weekend – Results announced
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REFERENCES for VISIONWORKS/MARK FILIPS

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during Covid)
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ELEMENTS OF SUCCESSFUL CAMPAIGNS

A church's capital campaign is a very exciting moment in its history. It is a chance to take the community's spirituality, Sunday stewardship, confidence, volunteerism and leadership, ministries, and physical campus to whole new levels! **A church only has one chance to get it right, so some key elements are required in making a capital campaign a success.**

1. Involve Key Groups of People in the Development of the Vision – A capital campaign is based on your community's vision or plans. Involve a good cross-section of your people. Make sure to involve your major donors, respected leaders, influencers, various groups impacted, and your staff in the planning process.

2. Compelling Vision – Winston Churchill once said that bold visions have the power to stir the blood. Be bold and dream big! People will make sacrifices for those projects that are life-saving, life-changing, and impactful.

3. Allow Sufficient Time for the Dream to Take Hold – After you have gone through your visioning process, you must “cast” your vision. Share your dreams and plans with the community in every way possible.

4. Strong Leadership – Whether you are a pastor, principal, president, or leader, your enthusiastic support of the vision is critical. If you are on fire, your people will be on fire, too!

5. Influential Campaign Leaders – You will eventually need to build a Steering Committee. Select leaders that are 1) positive and supportive, 2) major donor prospects, 3) prominent in the community, 4) respected by others, and 5) congenial.

6. Allow for Significant Time in Prayer and Reflection – After your capital campaign has begun, you will want to give the people sufficient time for their prayer, reflection, and response. Sufficient time yields the largest gifts!

7. Seek Large Gifts and Lots of Gifts – A campaign needs two kinds of gifts to be successful: large gifts and lots of gifts. The largest gifts should make-up 35-50% of the financial total. “Lots of gifts” will come from every member of your community.

8. Sufficient Pledging Opportunities – All parts of your community must be given ample opportunities to pledge. Whether through major gift approaches, pre-commitment gatherings, or several large-scale commitment weekends, you want to give people as many opportunities as possible to pledge in a “season of pledging.”

9. Strong Fulfillment (Pledge Collection) Effort – Pledges made are not pledges received! Simple pledge collection will raise 85-95% of your pledges. A strong and thorough fulfillment effort, employing the four things that can increase your pledge collections can increase your pledges up to 125% or 150% of your total.

PASTOR'S ROLE IN VISIONWORKS CAMPAIGN

A successful capital campaign begins with the spiritual leadership of the pastor. What are some fundamental attitudes, decisions, and actions of the pastor in the campaign process that will foster success?

- **Timely Development of a Plan** – Whether it is a strategic plan or a facilities study, the pastor and the church leaders want to keep driving the project forward. The planning process needs to involve some experts, the church leaders, and representatives of key groups, and it needs to be open, collaborative, and sufficiently reflective.
- **Being Involved with Key Decisions** – As the planning process moves forward, there will be times when decisions must be made. Sometimes making these decisions can be very difficult. But the Holy Spirit will work through the leaders and the process. Some churches avoid decisions, and this guarantees the status quo and no movement forward. As one writer says, “When decisions are made, new energies are released, and the next steps emerge.”
- **Making a Decision for a Feasibility or Planning Study** – With any sizable and vital project, it is necessary to do a study. A study involves 30-50 key donors in personal interviews and the leaders of the church in several focus groups. Studies share information about the plan, build excitement, answers lots of questions, and gets donors and leaders thinking about larger gifts and involvement in a capital campaign. If the leaders of the church support your plans, the chances are that your campaign will be a success.
- **Making a Decision for a Capital Campaign** – If two-thirds to 95% of your key donors and church leaders support your plans, then the capital campaign is a go. During the study, the consultant will be able to assess the opinions and make a recommendation about moving forward. With these impressions in place, the pastor and leaders can confidently decide on a capital campaign.
- **Selecting Chairpersons** – After the decision is made to move forward with a campaign, the pastor and key leaders should begin thinking of four to six excellent chairpersons/couples who will recruit the key team/sub-committee leaders and oversee the mechanics of the campaign for the pastor.
- **Other Involvements of the Pastor in the Capital Campaign** – Once the entire steering committee is recruited and the various teams' projects are undertaken, the pastor needs to focus on:
 - Prayer** – The entire the church to seek God's will and cover the campaign with prayer.
 - Communication** – From the very beginning the pastor will want to give campaign updates to all key parish groups.
 - Writing of Key Letters** – Of course, there will be critical letters (templates of which are provided by the director) for newsletters, brochures, and church fundraising packets.
 - Preaching** – During the public phase of the campaign, the pastor and perhaps lay leaders will be preaching and reflecting on the vision and stewardship.
 - Key Lead Gift Visits** – One of the keys to overwhelming financial success will the personal visits to lead donors. The pastor always gets the largest gifts. VisionWorks will train the pastor and strategize for each and every lead donor solicitation.

HOW TO START A CAPITAL CAMPAIGN

Pastors and churches on-the-move will need to launch capital campaigns from time-to-time. As the saying goes: Good beginnings make for good endings. So, it is vital that the campaign get off to good start to be successful!

These campaigns can be run for new churches/schools, restorations, building additions, debt reduction, new ministries, endowment funds, and a combination of all of these things.

Take a look at these crucial steps for campaign preparations.

1. Start Determining Your Needs – Through listening, parish feedback, and visioning, start coming up with a determination of future needs. This list and group of items go into a basket or vision/case statement that your consultant will help you create.

2. Create a Bold Preliminary Plan – With your leaders and architects (if you are building), develop the basic needs/plans/drawings and financial requirements. Give your people some exciting plans! Churchill said, "Bold visions stir the blood!" Middling and small plans do not. The good news is that you can mix small or unpopular items with larger items in your basket to create a very exciting case.

3. Hire the BEST Fundraising Professional as Soon as Possible – Churches and schools have one chance to be successful. There are no do-overs. You are not only hiring a company and its method; you are hiring a consultant! Make sure you select the best consultant possible as he/she will determine 95% of your success.

The campaign director will lead you step-by-step through the entire process, optimize advantages, neutralize problems, and help you capitalize on the major gifts piece of your campaign. Only an experienced consultant with much major gifts experience can help you raise over 2X your yearly giving and reach 3X, 4X, or 7X your yearly Sunday giving.

4. Implement a Feasibility/Planning Study (Study) – A study will determine your church's financial potential. Just as importantly, the study begins to plant seeds: \$100K thoughts turn into \$500K pledges, and \$1M thoughts turn into \$2M pledges! The study will help you assess parish support; turn large gifts into larger gifts; alert you to any landmines; surface the names of chairpersons, team leaders, and volunteers; and begin the process of communication to the whole parish.

5. Update Your Membership Roster – The membership roster is constantly changing. Some parish rosters are off by 10% or more! Start updating your roster as soon as possible.

6. Start Surfacing Chairperson Names – Begin brainstorming for the names of 4-6 people/couples. Surface the names of ONLY those people who are supportive of your plans, respected in the community, and easy to work with.

SOME ADDITIONAL THOUGHTS

1. **Go Big w/ the Vision/Case/Projects** – As Churchill said: Big visions stir the blood! It is actually the bigger, more comprehensive visions/cases that excite people. People want to be involved in some big, significant, and impactful. Start to develop a larger vision that comprehensively moves SMDP a big step forward.
2. **Most Pastors, Committees, and Churches Always Underestimate Their Abilities** – Pastors, churches, various committees, and parishioners notoriously underestimate their potential. I can give you many examples. What this means for you is: You can do better than you think! You need the right process, the right company, and the right consultant.
3. **Campaign Financial Goals** – VisionWorks usually uses three-to-four campaign goals. The goals are set, with the pastor, after the feasibility study. In the St Wenceslaus, Omaha – Building and Debt Reduction Campaign, we listed four goals:
Goal 1 - Celebration: \$5M – Would save \$2.6M in interest
Goal 2 - Challenge: \$8M - Would save \$4.5M in interest
Goal 3 – Challenge-Plus: \$12M - Would save \$7M in interest
Goal 4 - Transformation: \$16M – Would save \$7.6M in interest

In all campaigns, VisionWorks works to exceed our top goal. In fact, to exceed the top goal, we must aim for 3X the campaign's goals. This is another example of "going big. All of our campaigns have hit the top or the second goals.

4. **Calendar and Timing of Your Campaign** – The two bookends of a campaign are 1) when you want to start and 2) when you want to end. In campaign and calendar design, we work backward from when you want to end or when you need the cash to start flowing. Optimal (VisionWorks always seeks to optimize in all that it does) calendaring can only be done by a skilled and experienced consultant. There are many pieces to a capital campaign, all needing proper implementation time and arrival time for best effect. A variety of calendars are possible, but they must be constructed carefully for the best effect.
5. **The Consultant, NOT the Company, Directs Your Campaign and Determines Your Success** – The consultant that the company chooses to assign to you makes all the difference. As we know, there are all kinds of priests, all kinds of people, and all kinds of fundraising consultants. You always want to choose a consultant (from the company) that best fits you, gets along w/ the pastor and staff, works the best w/ people, and who can inspire people to do their best for the Kingdom.
6. **Next Steps** – Mark Filips will get you from case development through study to campaign set-up and preparation to major gifts and public phase of a campaign through pledging to three years of pledge collections.