



CAPITAL CAMPAIGN FEASIBILITY REPORT

PREPARED FOR

NATIVITY OF CHRIST

GREEK ORTHODOX CHURCH

NOVATO, CALIFORNIA

NOVEMBER 2019

THE STATEMENT OF NEED FOR THE CAMPAIGN

The last major capital campaign at Nativity of Christ was conducted approximately 30 years ago for the construction of our present hall, which has served us so well for so long. It is the privileged task of each generation to undertake a capital campaign and collectively offer our shared sacrifice of gratitude to Father, Son and Holy Spirit – NOT because God needs for us to do this – it’s because WE need to do this in gratitude for all the blessings we have received.

Recent Archdiocese statistics alarmingly report that Greek Orthodox Church membership is shrinking nation-wide, as secularism (the negation of worship) continues to dominate our culture. Mercifully, Nativity of Christ has been spared a precipitous decline in membership. But for how long? We cannot afford to be complacent.

For the past year a transparent and comprehensive strategic planning process that included a thorough review of our facilities as well as our many ministries has been completed.

At the August 25 well-attended Special Assembly, the motion below was unanimously passed:

“To approve the Strategic Plan as presented to the Special Assembly and to undertake a fundraising feasibility study to fund the Strategic Plan, without incurring any debt to the Parish.”

The goal of the Capital Campaign is to raise \$3.35 million dollars in three-year pledges to fund the Strategic Plan.

Studies of hundreds of professional capital campaigns reveal a certain dynamic at work in successful campaigns. This is illustrated in the Gift Chart further below whereby approximately 90% of the goal is given by 10% of the organization’s supporters.

Undeniably, we must acknowledge that the United States economy has experienced the longest peacetime expansion ever – 12 years! Over that same period, Marin County residential housing has greatly appreciated in value. Unemployment rates remain historically low. Not everyone has prospered, of course, but most have. For some, the accumulation of assets has soared. We humbly and respectfully request your meaningful and proportional participation in the Campaign. We need you to help secure the future of Nativity of Christ Greek Orthodox Church and to model a new paradigm of sacrificial giving.

SCOPE AND METHOD OF THE STUDY

Fifty-one (51) surveys were completed. Forty-one (41) of the survey takers self-identified. Ten (10) survey takers elected to remain anonymous or inadvertently missed putting their name in the first question. Anthony Scott, a member of the parish and an Orthodox professional fundraiser, who has provided capital campaign consulting service to scores of Orthodox parishes and organizations, coordinated the study. Especially encouraging was the 100% participation of the Parish Council and the Steering Committee of the Strategic Planning Process in the survey.

The list of self-identified participants in the survey may be found at the end of the study. In order to preserve the anonymity of survey takers in terms of their responses to questions and their opportunity to offer a comment, the names have been listed in random order to negate the possibility of matching responses with the order in which participants took the survey. The only people who have access to responses and comments are Fr. John and Anthony.

GENERAL PARISHIONER PERCEPTION OF THE STATE OF THE PARISH

In order for a capital campaign to be successful, it must aim to raise funds for the right cause, humbly asking the right people at the right time for the right resources. For this reason, it is important that Nativity take account of the general state of the parish before launching a campaign. The survey asked, “Concerning the future of the parish, do you feel Very Optimistic, Generally Optimistic, Somewhat Concerned or Very Concerned?”

Opinions were strongly favorable with 84% choosing “Very Optimistic” or “Generally Optimistic.” 14% expressed that they were “Somewhat Concerned” with 2% choosing “Very Concerned.”

Sixteen participants offered comments on their response.

- I’m proud of the efforts of our parish council as well as the passion and drive of many of our dedicated parishioners.
- For the last 5 years we have been on a positive ascent - consistency between "Talk and Walk , as well as delivery of excellent results.
- You need to continue to build upon the excellent leadership and accomplishments.

- As you both probably know by now, I am a cynical optimist. I believe our goals are reachable but to do so will require focus, fierce commitment and the efforts of many to stretch, change their thinking and stepping out of their comfort zone. It's the "efforts of many to change..." that gives me pause. It's doable but may require its own strategic plan to effect the change.
- Our parish is small and barely has the critical mass to be financially viable.
- I think it may be difficult to get such a large financial commitment. Everything in California is very expensive, especially for seniors, and young families.
- I can't speak for the growth or decline in stewardship numbers going forward, but I believe that Nativity currently offers a very attractive environment to potential stewards. I believe there is also a good group of individuals leading the way forward to continue to improve our parish.
- I would say very optimistic however we need to do more to ensure all families are participating in things other than Sunday services/Sunday School. We mainly have the "regulars"
- Our number of stewards seems to stay stable. We don't seem to be able to grow. I'm very concerned that this generation of youth and young adults have no interest in organized religion. I see so many past active youth who are now young adults leaving the church
- Dwindling attendance and The lack of commitment to God and relationships.
- The details of the SP need to be presented so all can see the costs of each segment. The last time the SP was presented the costs were confusing.
- The Church is Feasibility for the future and thinking strategically instead of just doing daily events and reacting to issues as they arise.
- It is troubling to learn how this organization has lost a tremendous amount of participation and membership, yet the council members, and the priest and the Orthodox upper management seem to feel there needs to be a strategic plan in placethe question is why ? the question again becomes why must you always ask for the participation of the members when time and time again participation in activities are down?
- My optimism rose in direct consequence of the unanimous vote to pass the strategic plan and to proceed with a fundraising Feasibility study.
- Our future depends on the growth of our faith. Instead of growth, we have declined.

PARTICIPANTS WERE ASKED TO IDENTIFY THE STRENGTHS OF THE PARISH

As the reader may note, this question and the following one are quite similar to questions asked in the first strategic planning survey. We apologize for what may feel redundant, but the surveys were taken nearly one year apart. It felt important to ascertain if there were any major changes in the views of parishioners during the past year. We concluded that people were even more optimistic and forward looking than earlier this year. Now, the strengths of the parish:

- The people and their faith
- The parishioners and spiritual leadership.
- The love of the faith community. Our dedicated priest to Holy Scripture and Holy Tradition.
- Good people working together trying to get on the Christ centered path ...amidst a crazy secular context on a local and national level , thirsty for the Faith but trying to find it !
- strong priest, supportive members
- Faith, family values, friendships
- Love for our church, commitment, ministries that engage everyone, fun and educative events/ programs, willingness to participate/ help
- An abundance of TALENT, ENERGY And a CAN DO ATTITUDE
- Enthusiastic leadership, talented parish members, upbeat spirit
- Faith-based work ethic as experienced in the preparations for the festival and other ministries of the church
- I feel it's important to note here the good service and professional work of Rebekah Harmon, our Office Administrator
- There are many faithful people who love God here, There are many hard workers
- Community, love, compassion
- Tight knit community
- parish priest, board members
- Nice cohesion.
- love for the church, many loyal parishioners
- The spiritual and cultural offerings; the cohesiveness and commitment of the core parishioners, the drive to improve, enhance and progress by Father, parish council and a core group of parishioners, Father's sermons, the choir, the youth program

- The people The leadership The programs
- Open minded priest with a vision, strong sense of community, teamly
- Getting community involved, dance group, youth ministry, Greek school
- Community, pastoral leadership, growing evangelism and program development.
- Fellowship and priest
- Festival, Priest, Ministries
- I believe the people are our Parish's biggest strength. We do not have the same level or drama that other parishes have and we are very productive.
- Strong Priest, Adequate Facility, Community Support
- Sense of community, already established ministries, generosity of parish/ people
- community, people participation, fellowship
- I very much appreciate the patience and support of Fr. John as I hope to render useful service to the Lord within our parish.
- Tremendous leadership, strong ministries, faithful stewards
- Activities for all if they choose to participate
- Engaging priest, amazing location, young families, stable financial position
- Tight-knit community, love for the church, pride in our faith/culture, various trades, young families
- Young vibrant dedicated priest, handful of very dedicated members, there is a good energy going on which hopefully we can continue to build upon
- Our Liturgy- worship of the Lord,
- Competent and caring spiritual leader, good leadership, growing ministries
- dynamic young priest and parish council and others who encourage us
- Strong core group. Beautiful location and facilities. Financially stable. Up and coming interest from young families.
- communication is only amongst the board members and parish council members; if it is not to the liking of the local priest then somehow he manages to manipulate the situation into making it where it becomes acceptable to everyone ; You do not see any new members on the parish council? Why is that we are seeing the same persons time and time again ?
- The One, Holy, Catholic and Apostolic Church and the good leadership of Fr. John and all the priests that preceded him, Rebekah Harmon and her diligent and faithful attention to administrative parish duties.
- Community, location

- Various ministries, current priest, current council
- a place to pray
- Priest, beautiful church
- It's good to be in Marin county.
- 1. Vibrant Bay Area community, 2. Newer buildings 3. Engaged community members
- Awesome property, young and enthusiastic priest
- Commitment of congregation to the goals of the plan

WHAT AREAS OF THE PARISH COULD BE IMPROVED UPON?

- CONSISTENT INVOLVEMENT INCLUSIVITY NON-JUDGEMENT
COMPASSION/EMPATHY (NOT ALL CAN GIVE)
- All areas.
- Sunday School. Hope to see it grow.
- Better face to face communications and interactions , in order to create more opportunities to find the spirit and sense of community, to unabashed witnesses of the TRUE FAITH like Orthodox parishes generally evangelism. Jesus' last directive is largely ignored. many children register for Sunday school and far fewer attend
- Welcoming new families, removing negative stigma for those members not from Crete
- more young people to participate/ help, to become more independent financially
- More direct personal communication
- Large geographic service area - difficult to keep people engaged actively
- Areas for improvement seem to already be articulated and addressed in the Strategic Plan and Actions.
- There are groups in our church that do not care to build relationships with others unlike them
- Vision, thinking strategically not just wishfully, innovation, willingness
- Expand volunteerism (beyond the few that do the majority of the work)
- create a warm & welcoming atmosphere to visitors,

- Engaging more parishioners in the ministries, developing consistent outreach within and outside the church, communication - esp. among the ministries
- Communication, Fixing our buildings, Growing our community
- communication
- Disability access to church and between church and hall
- Developing entry points for parishioners to become active in the parish, continue to improve processes to welcome visitors and teaching opportunities for current members on how to share the faith.
- Having a full time youth director and someone who could assist Father in coordinating all the ministries
- Grounds for more and easier usage, classrooms
- I believe we need to do a better job of giving parishioners a reason to choose parish activities over other extracurricular activities. Is there a way for our ministries to compete with some afterschool sports, for instance?
- Modernize existing Bathrooms, Additional Bathroom, Security Cameras of Parking, Platea, Back of Church. Modernize Kitchen and appoint a restaurant owner to oversee kitchen for food safety. More lighting around Stairs. Landscape hill approaching church. Great opportunity to beautify neighborhood
- Some of the facilities need updating/ upgraded, more funding for ministries so more awareness can happen and more activities
- creating a school, including the Novato community. expanding the youth programs,
- More acceptance of non-Greeks, restrooms in or closer to Narthex, elevator for disabled guests and parishioners.
- The facilities, especially the two kitchens
- Stewardship, facilities, outreach
- ADA accessibility, organization, consistency, outreach, attendance
- Greater participation in worship and Sunday school, to be more inclusive and less cliques, more committed stewards - there are few core people doing a lot of work for the community,
- Communications and patiently working with the individual families on a personal level
- Better communications, not enough transparency
- Doing everything in Strategic Plan that improves welcoming people to our Church, making guests feel welcome, making those searching for God and a community welcome.

- More English should be used in Liturgy, to invite more young people to join us, because they usually do not speak or comprehend Greek
- Following through to the end when volunteering. Seeing the value of serving and how that creates growth. Not being afraid of success. Being willing to give of time, talents and Treasures without a personal expectation. Being thankful for our past without feeling one family over others deserves praise. Being thankful for each other and creating those bonds as one in Christ. Consistency and finishing a jobs - not leaving a mess for the next guy. When pointing out an issue to look at a way to solve
- There needs to be 100% new participation; take out all of the parish council members who have already served in the past; completely bring on a new and unbiased group of adults;
- A full church on Sunday when the Divine Liturgy begins. This is when Father proclaims "Blessed is the Kingdom of the Father and the Son and the Holy Spirit. Let us show more respect to God by being on time rather than the overly casual behavior of most people wandering in during the service. Chronically coming in late is a discourtesy to God and a hugely poor example of how we practice our faith for visitors and seekers and those who marry into the community.
- Inclusion/diversity, welcoming all members, involvement in the community
- Welcoming people to the church. (New members) , it has improved but still need some additional work.
- bonding
- The facility/campus and it's access is challenging for most parishioners.
- New Sunday School Building, 2. Expanded youth programs w Bay Area Orthodox Churches, 3. Continued religious education for adults
- More younger people
- participation of entire congregation

THE PRACTICE OF STEWARDSHIP AND THE AVAILABILITY OF GIFTS

Survey question number five asked, “How would you assess generous and sacrificial giving in stewardship? In 2018 the average annual pledge was \$1,008 or \$2.76/day. How does this reflect sacrificial giving for the parish? In answer to this question, 38% responded either “Excellent” or “Good”; 16% responded either “Mediocre” or “Poor”; and 14% responded “Don’t Know.” The remainder chose not to respond.

Here are the comments that were offered on the question:

- Unable to offer comment on parishioners' generous and sacrificial giving to the church. God knows if the giving is cheerful and for His Glory.
- People are at different levels of ability to give ,Time ,Talent and Treasuretough to be judgmental
- Should be approx 10% of total family income...when possible
- I don't personally like 'average' number, more realistic to view how many stewards there are at individual levels I think. So, that \$1,008 figure doesn't give me enough data to offer an opinion
- Although I would give more, I do not know what circumstances might be preventing others from giving more.
- I feel good about my pledge. I don't feel good judging what others have pledged.
- My first response was “mediocre“ but, put in terms of \$2.76/day, I downgraded. Generous? For some people, that might be. Sacrificial? Now that’s a tougher argument to make.
- This average amount would be sufficient if we had more parishioners. It’s hard to be financially viable being this small.
- As I said, it will be difficult
- Cannot speak to the financial resources of the parishioners. The stewardship does not consider the additional funds that most parishioners contribute in other ways
- It’s sad because that average would imply that we all should be on welfare. I guess it’s just going to come with more education that a number like that is unacceptable
- May give time too.
- I would say it depends on the family and what their financial position is.

- As a parish, we need to take more responsibility for our expenses. While it is a blessing, we rely too much on external income such as the cell towers (which will likely not last too much longer as technology changes)
- Parishioners have not been educated about sacrificial giving. We have many who wait to end of year to see what they have left to give to God through the Church. Deciding commitment to God should be first. People are giving minimally instead of what they really can give.
- Think we all could do better based on income and true giving.
- We have hurt ourselves with the many, many fundraising in projects and appeals that teach everyone to give a small amount many times a year, rather than a truly sacrificial one offered in deep, DEEP gratitude for the Lord Jesus Christ who gave everything of Himself so that we might have LIFE and the countless blessings we have received
- I believe if we removed the top 10 donors, our average pledge would approximate \$500.

Before presenting the remaining results of the Fundraising Feasibility Study, let us briefly look back approximately 12 months to a small meeting in Fr. John's office where a discussion was held on the subject of undertaking a strategic planning process looking five-years into the future. The six people gathered there became the Steering Committee of the Strategic Planning Process. In addition to Fr. John the other five people included were Spiro Stratigos, Christ Kamages, Vicki Kalabokes, Steve Rouman and Anthony Scott.

Over a period of one year, with the support of the Parish Council, organizations and ministry heads, as well as the general parish, 14 professional strategic planning items, including studies, videos, architectural renderings, surveys, budgets, goals and objectives, PowerPoints, explanatory reports, etc., were produced and posted on the parish's Internet homepage in the spirit of complete transparency. This document makes item number 15 and it also will be posted on the website for general distribution as soon as possible. Hundreds and hundreds of hours were spent this past year in discussion and hard work by the Steering Committee and many others who were invited and encouraged to participate through parish assemblies, surveys, personal meetings and a "workshop", which honestly, turned into more of a general (and very helpful) discussion session open to the entire community. Found below is the list of these 15 strategic planning and fundraising feasibility items:

Strategic Planning Process: Introduction

Strategic Plan: Question and Answer

Facilities: Past, Present, and Future

Spiritual Entry Video

Executive Summary Survey Report

Complete Survey Report

Five Year Strategic Plan Goals

Approved Strategic Plan

Appendix For The Strategic Plan

PA Presentation of Strategic Plan

Strategic Plan Video

Overall Budget and Condensed Summary of the Beyond 50 Strategic Plan

Fundraising Feasibility Survey

Fundraising Feasibility Report

With deep gratitude to God and the faithful participation of the members of the parish at a Special Parish Assembly, convened on August 25, 2019, a unanimous vote was passed to accept a motion with three parts: 1) to accept the Strategic Plan, 2) to proceed with a Fundraising Feasibility Study for a \$3,350,000 capital campaign and 3) to occur no new debt in implementing the strategic plan. (In fact, the present policy of the Parish Council is to *reduce* present debt as pertains to the parish house.)

GIVING LIKELIHOOD BASED ON THE GIFT

In the survey a series of short questions were also asked concerning the likelihood that the major gifts necessary for success will be offered. Here are the results from the survey takers:

How likely is it that the parish can raise \$3,350,000 with three-year pledges?

14% said “excellent”; 36% said “good”; 32% responded “fair” 14% responded “poor”

How likely is it that the parish will receive a leadership gift of \$1,000,000?

15% said “excellent”; 19% said “good”; 31% said “fair”; 21% said “poor”

How likely is it that the parish will receive a second leadership gift of \$500,000?

18% said “excellent”; 22% said “good”; 35% said “fair”; 15% said “poor”

How likely is it that the parish will receive two gifts of \$250,000 each?

11% said “excellent”; 33% said “good”; 42% said “fair”; 7% said “poor”

How likely is it that the parish will receive three gifts of \$100,000 each?

11% said “excellent”; 52% said “good”; 27% said “fair”; 27% said “poor”

How likely is it that the parish will receive five gifts of \$50,000 each?

20% said “excellent”; 43% said “good”; 25% said “fair”; 9% said “poor”

How likely is it that the parish will receive 10 gifts of \$25,000?

25% said “excellent”; 41% said “good”; 23% said “fair”; “poor”

How likely is it that the parish will receive 20 gifts of \$10,000?

33% said “excellent”; 40% said “good”; 18% said “fair” 7% said “poor”

ASSESSING THE LOCAL ECONOMY

In response to the question, “How would you assess the local economy”, 70% of those who responded in the survey rated the local economy as either “excellent” or “good.”

THE INITIAL INDICATION OF PARISHIONER READINESS TO GIVE AS DOCUMENTED IN THE FEASIBILITY SURVEY

Here's the tally on prospective giving as recorded in the survey. Please do recall that people were offered the option of putting down a range of possible giving and that pledges could be honored over a three-year period.

There were 51 people who took the survey. Assuming all were stewardship member households of the parish and that there are approximately 275 member households, this would represent 19% of parish households. Here, it is important to remember, that when professional polling is conducted (as for example election polling), a small percentage of potential survey takers actually participate. Nevertheless, from a relatively small number of survey participants it is possible to forecast eventual outcomes.

The low number of participants reflect a natural shyness associated with the public discussion of money. No surprise there, especially in a tight knit community such as Nativity.

In the experience of the coordinator of the survey, having conducted scores of fundraising feasibility studies in Orthodox parishes ranging from 40,000 members to small missions of 50 households, the number of households that take the survey is *always* low. What is also true, is that the *amount* of possible giving by survey takers is almost always *very low* as well.

There are commonly cited reasons for the low number and size of possible gifts e. g., the larger the gift, the more frequently these gifts are quietly anonymous; oftentimes people want to see how other people are giving before they decide what they will do; people who voluntarily choose to make a truly *meaningful* gift may also require consultation with an accountant or with an attorney or need to plan their gift dependent on future circumstances. What's important to see here is that 92% of the survey takers indicated that *they will give*. This is a very good number and likely an indication of how the general parish will respond to the campaign.

The results of the survey showed two potential gifts of \$100,000 each, two potential gifts of between \$50,000 and \$60,000 and 10 potential gifts between \$10,000 and \$30,000,

If we count the low side of those who entered a *range* of potential giving this would be \$473,300 over a three-year period. On the high side of a *range* of giving the amount would be \$545,900.

Obviously, this is considerably lower than our goal of \$3,350,000. Yet we must remember this is just from the 35 people or families that cited a gift amount or a range of giving. There are an additional 240 “units” capable of making a gift. Dividing the lower range of potential giving (\$473,300) by 35 potential givers reveals an average gift of \$13,522. Dividing the higher range of potential giving (\$545,900) from 35 potential givers reveals an average gift of \$15,597. Once again, it’s highly unlikely that this is going to be the average gift levels tallied from the remaining 240 stewards. However, professional fundraisers know that it is often near the end of campaigns, that the largest commitments are made.

The first group of people to declare their intent to give by stating a potential gift amount likely include leaders or people with a reasonably high emotional commitment to the project or a high capacity to give. A few of those do actually show up in our survey.

However, if we take the 275 stewardship pledges in the parish and subtract the 35 people or families who have already indicated a potential giving amount to the capital campaign, then we have a remaining pool of 240 potential giving "units" though it is highly unlikely that the average potential gift from this larger pool of donors will compare on an equal scale with the first group of survey takers.

Once again we discover how critically important it is that major gifts, often stemming from accumulated assets and not just monthly income, will ultimately determine success or failure in our campaign.

We are still in search of a leadership gift of \$1,000,000; a second leadership gift of \$500,000; two gifts of \$250,000 each; a third gift of \$100,000 and a number of gifts at \$50,000, \$25,000 and \$10,000. However, let us never forget that every gift will be gratefully received with joy, remembering that only God and the donor knows if the gift is truly sacrificial.

RESPONSE TO THE PLANNED GIVING QUESTION

Another tremendous source of hope arises from question #6, concerning planned giving or the possibility of including Nativity in one's estate plan.

Analysis is a bit challenging here because survey takers were encouraged to check any and all of the options that reflect their point of view. Of the 51 survey takers who responded to this question, only 7 indicated that, "This is not a program we would participate in." The remaining 44 survey participants on some level and in some way, indicated, "a willingness to consider this", "an openness to receiving information on this", "have a conversation about this", etc. Two farsighted parish members disclosed that the parish is already in their estate plans. We pray God grants them *many more wonderful years!*

This is very encouraging concerning not only the campaign but just as importantly, the long-term financial stability of the parish and therefore, the long-term durability of the Strategic Plan beyond five years.

LASTLY, SURVEY TAKERS WERE INVITED TO OFFER THEIR WISDOM TO LEADERS OF THE CAMPAIGN

- BE PATIENT ... THE MONEY WILL COME ... BE GUIDED BY LOVE AND THE REST WILL FOLLOW
- None at this time
- Obtain realistic bids for the project(s). Only proceed when pledged monies are collected. Incur no debt.
- Be open, humble and honest with the parish....communicate simply and directly to solicit input , needs and participation.....minimize bureaucratic tone, posture and persona....find a way to build bridges NOT walls....build a solid foundation
- its shown that basic plan is there. understand there is lots of work. adopt, understand and advertise there will be many project other than just asking members to donate.
- Have funding in hand before breaking ground and don't underestimate the cost/time of Feasibility and construction.
- Thank you for doing this, the effort is greatly appreciated
- Provide directs during clear one to one communication

- Be positive, don't guilt people into giving but inspire them to give. Need to show how planned improvements will benefit them as well as the community
- No one should be made to feel guilty about not being able to give but everyone should feel excited about doing what they can. I don't think all parts of the plan are needed. I would be motivated to give to a part that I felt strongly about.
- Think outside the box. Don't start asking for money before developing a plan. Targeted not boilerplate. Integrated not compartmentalized. Strategy before tactics. Aim before Fire.
- Good luck, and God bless !
- the right persons would have to be selected, someone with compassion, enthusiasm of the project and one who can understand and relate to people, young & old, rich & poor, etc.
- None.
- I would think it will be a very difficult task. Volunteers for big projects is not easy
- To not limit the solicitation to the parish
- Be straightforward Communicate honestly Pray for Gods guidance Take it in stages...don't commit money you don't have Engage community support, work with ministry heads to gather info to show how things are coming together& ask for this info well in advance of when it's needed
- flexibility -i.e. perhaps we would consider giving to a particular item on the plan, we understand that that is not possible
- Take into consideration the family income, age of steward and stewardship involvement in parish
- Thank you all for your hard work and time. Meeting with people is the hardest part but also the most fun and rewarding. Encourage each other to get those important meetings.
- Pray, fast, read scripture, attend liturgy and participate in the Eucharist. Get your spiritual life right and everything will flow from there
- Be specific
- None at this time.
- Need to connect one on one. Visit people in their homes. Planned giving takes an 'ask' and the person asking has to be credible and trusted.
- Keep everyone up to date, which you all have already been doing a great job at. Transparency is good. Knee up the good work so far.
- Reminding parishioners that the future of our church is at stake and also Annual cost breakdown of running the church..
- Be patient

- Continually show people what's possible. Get to know the individuals and their financial abilities, and keep giving out as much information as possible to combat any misconceptions
- Be transparent, be honest, provide frequent reports as to exactly how the money is being spent, be willing to admit and change course if something is not going to plan, prioritize the ministries - without growth and sustainability the physical building is just a shell
- Slow down
- More open communications as to all the costs and where the funds are going
- Visit everyone individually
- As the Greeks say: God strengthen you in your endeavor
- Be consistent and don't give up. This will happen as goal is very obtainable.
- There would be no advice to anyone leading this effort -
- Be humble and respectful. Rely on God for direction. Give generously to set a good example for others. There's an old saying in fundraising: "Only those who have given sacrificially, will have the courage to ask others to give sacrificially."
- dont be pushy- make clear what they are giving to- small group should not make list-
- Yiasas
- ask at a time of year when not many expenses are coming. Holidays, tax time, etc
- I sincerely hope it is as you say that someone is offering to donate the money, however wants to see the future plans. That would be miraculous and such a gift.
- Keep the communication transparent and accurate at all times.
- Gather small groups of people, Identify "heavy hitters" for substantial donations, Provide fiscal transparency
- Confidentiality of info gained is paramount

PARTICIPANTS IN THE FEASIBILITY STUDY

The first question in the survey requested participants to write in their name. People could also remain anonymous but writing in “anonymous” or leaving the name space blank. Therefore those who elected to leave the space blank did not have their names appear in the list of those who took the survey. Still, those who chose to leave the space blank did have all their subsequent responses recorded, as well as their comments. Also, the names are deliberately jostled in order to negate response or comment “trackers” from ascertaining who is saying what.

Dina Camamis	Anonymous
Eleni and Roman Scanagatta	Irene Starling
William Burrows	Nick Kanas
Victoria Kalabokes	Beverly Christo Orr
Nonie Giusti	Renee Scott
Spiro Stratigos	George Sotiras
Anonymous	Andrea Morales
Philip Marshall	Nicolas Haris
Theodore and Elaine Passaris	Anonymous
Christos Kamages	Marika Yakumithis
Bryan Hall	Peter Passaris
Eirini Karatzaferi	Dina Stathis
Patricia Kamages	Carol Economy
Kenn Cunningham	Steve and Liz Rouman
Karen Walters	Andy Stenros
diane kavantjas	Floretta Burrows
Scott Walters	Marti Madias
Nia Lendaris	George A Georgeson
Anonymous	Michael D. Lagios
Carol Pool	stella hanis
Cheryl Messner	Chris Kalabokes
Rose Hunter	Fr. John and Presbyteria Stephanie
Anonymous	Anonymous

ESSENTIALS FOR SUCCESS

The Capital Campaign Feasibility Study was conducted to assist Nativity of Christ Greek Orthodox Church in Novato, California (Nativity) to evaluate the status of several key elements necessary to conduct a successful capital campaign.

- The membership of the parish must be convinced of the benefits to be realized as a result of the Strategic Plan.
- Consensus must be attained through two-way communication with the members of the community on key aspects of the proposed Strategic Plan, including both ministries as well as facility enhancements.
- Key parish leaders must favorably perceive the fund raising cause and readily offer support to the fund raising team.
- The funds sought in this effort must be viewed as reasonable and attainable.
- All donor prospects, particularly major donor prospects must be identified, qualified, cultivated and respectfully and humbly solicited.
- All donor prospects must be matched to the standards of giving required for success.
- Key Campaign leadership must be recruited, empowered, equipped, coached and supported.
- The parish must possess sufficient staff support and technology to manage the details of the campaign (management of information, communications, letters, securing appointments, pledges, gift recording, acknowledgment, etc.).
- The entire capital fund raising effort must be conducted in such a way as to enhance the spiritual wellbeing and vitality of the community, thereby enabling Nativity to fulfill its mission in fidelity to the Lord Jesus Christ.

WHAT IS NECESSARY FOR A SUCCESSFUL CAPITAL CAMPAIGN FOR \$3,350,000?

Substantial goals cannot be attained with token gifts. Winning a major campaign requires significant giving, supported by five-, six- and seven-figure commitments. These largest gifts must be secured to

cover approximately three quarters of the total goal of the campaign. Campaigns that reach their objectives in a timely and efficient manner do so through carefully planned strategy. Even though each group of donors is unique, giving falls into fairly predictable patterns. Everyone’s level of giving will be affected positively by early major gifts that set a new standard and an example to follow. The top ten gifts “make or break” a campaign. The probability of success increases significantly if leadership-giving levels meet or exceed the standards shown in the chart below. Experience shows that although tempting and mathematically feasible, replacing the top 12 gifts with greater numbers of lower-level gifts is not practical.

FUNDS TO BE RAISED: GOAL OF: \$3,350,000

Gifts Needed	Gift Amount	Sub Total	Cumulative Total
1	1,000,000	1,000,000	1,000,000
1	500,000	500,000	1,500,000
2	250,000	500,000	2,000,000
3	100,000	300,000	2,300,000
5	50,000	250,000	2,550,000
10	25,000	250,000	2,850,000
15	15,000	225,000	3,150,000
20	10,000	200,000	3,350,000
Many	<5,000	150,000	3,500,000

We exceed our goal!

The Capital Campaign Feasibility Report

Comparing the Standards of Giving for a campaign to raise \$3,350,000 with the potential gifts indicated by the 51 survey takers raises questions about the viability of a single campaign of this magnitude. The top twelve gifts make or break the campaign. These include the leadership gift of \$1,000,000 and six additional gifts ranging from \$100,000 to \$500,000, plus gifts of \$50,000, \$25,000, \$10,000, etc.

If this subset of the donor pool is representative of many of the remaining “top prospects,” then it is likely that continued cultivation will be required, seeking to attain consensus on the project and drawing prospective top donors in to take ownership of it. Then it will be necessary to assist them through the emotional, psychological, mental and most importantly, *spiritual* journey that allows major donor prospects to experience the joy and freedom of sacrificial giving – perhaps for the first time.

This rather cautious assessment of the availability of major gifts in the parish community must be balanced with the general experience of counsel in many other Greek Orthodox communities. In light of this, several points need to be underscored:

1. Greek Americans have been very successful in this country; Nativity parishioners are no exception; though, of course, not every family has benefited from this blessing – but perhaps every greater blessings; So much depends upon our level of gratitude.
2. It is probable that other major donor prospects, either unknown or overlooked will emerge as the campaign proceeds;
3. In parishes that have not undertaken a capital campaign in many decades (Nativity qualifies for this), public discussion of giving is often met with pronounced shyness;
4. Parishes that rely heavily upon fundraising events, activities and ancillary sources of income (rentals or cell phone towers) have not yet learned to give proportionately according to Biblical standards. Inevitably, many think about their capital gift in the same way they think about stewardship – a small portion of their monthly income without even a glance at their appreciated assets.
5. When other Greek Orthodox Church communities faced a similar challenge, major donors did indeed rise to new levels of giving, though they had initially indicated modest gift intent;
6. If leadership gifts are made early on and those who give them agree to help seek other gifts, then the prospects for success may brighten considerably.

SPECIFIC CAMPAIGN OPPORTUNITIES

- 1) Parishioners of Nativity feel very optimistic about its future, express love and devotion for their community.
- 2) Fr. John is loved and respected by his parishioners and is perceived as a strong leader.
- 3) All those present at the August 25 parish assembly voted “Yes” for the Strategic Plan;
- 4) The remarkable commitment to include ministry funding in the capital campaign earns high marks in a national comparison with other capital campaigns which typically only includes fundraising for facilities;
- 5) The Parish Council is perceived as effective, with a number of survey takers commenting upon the dedication of its members;
- 6) The one-year strategic planning process was professionally executed and now awaits funding, followed by implementation;
- 7) Of the 51 people who took the survey 92% said that they will give to the campaign, though some indicated they didn’t presently know at what level;
- 8) Of the 51 people who took the survey, all of whom responded to the planned giving question, 79% indicated a *willingness* to consider this possibility;
- 9) Two prospective gifts of \$100,000 each, two prospective gifts between \$50,000 - \$60,000 and nine prospective gifts between \$10,000 - \$30,000 have also been indicated.
- 10) Additionally, a small number of those perceived to have significant gift capacity have expressed the intent to participate even though they did not yet mention a specific amount.

SPECIFIC CAMPAIGN CHALLENGES

- 1) Joyful *sacrificial* giving as a *meaningful* and *proportionate* return to God of all that we have received from Him is a fairly rare practice at Nativity. The principle that should be most influential in determining our stewardship commitment should be a profound sense of gratitude with a meaningful gift personally offered to our savior Jesus Christ! Unfortunately, annual stewardship giving tends to be in response to what others are doing, or what is required for the operating budget, or we compare ourselves with the giving of other Orthodox parishes;
- 2) The parish has little experience receiving major gifts or soliciting major gifts. major donors mentoring this process guides and inspires others. The absence of major donor mentoring results in an impediment to progress;
- 3) Survey participants were not entirely optimistic about the ability of the parish to successfully raise \$3,350,000 in a single campaign. They do believe, however, that a significant portion of this amount can be raised – if not the whole portion, given enough time;
- 4) Skepticism and doubt are not friendly allies of a capital campaign;
- 5) The parish may be understaffed. The Church Growth Institute recommends that for every 300 parishioners (not families) a parish have one full-time pastoral care-giver. Nativity presently has only one full and one part time. Yet 250 stewardship households and perhaps another 100 outlying families could approach 1,000 people somehow connected with Nativity. A full time Parish Ministry Director is one of the goals of the strategic plan.

CAPITAL CAMPAIGN RECOMMENDATIONS

The recommendations presented here are drawn from the information received from those who participated in the Capital Campaign Feasibility Study, plus a number of personal meetings with prospective contributors. The coordinator has interpreted, analyzed, and evaluated the data on the basis of professional theories and methods of nonprofit development combined with 30 years of fund raising and organizational development experience in Orthodox settings. The coordinator respectfully suggests that the recommendations should be carefully considered as the parish reflects upon a capital campaign.

- 1) **Go forward with a capital campaign. The suggested goal, based on the *empirical evidence* gathered in meetings and in the survey, would be \$2,500,000. A “stretch” goal would be**

\$3,350,000; Failure to reach the stretch goal would mean that certain essential items in the strategic plan would not receive funding. Realize that goals can always be increased should strong giving warrant a higher objective; Furthermore, almost every person spoken with or who took the survey indicated a willingness to give to the campaign;

- 2) **Do not allow this first pass on what people “might” give cause a feeling of disappointment. Every campaign feasibility study comes in with a low, disappointing number of participants and a low disappointing number concerning how much could be raised; evidently, people need time to “warm up” to a truly meaningful gift of gratitude to God.**
- 3) **Facilitate an inclusive process to help parishioners buy-in to the Capital Campaign and provide ample information on the Strategic Plan; demonstrate competent planning and accurate cost estimates;** Give people an opportunity to be heard; Those who participate in the process will likely feel a good sense of “ownership” that will translate into more meaningful giving as the campaign progresses; Listen carefully and attentively to people; Remember that opposition and obstacles sometimes come from parishioners who may have legitimate issues with the project; these beloved fellow parishioners fulfill a vital role; – they test the assumptions of leadership and force accountability and due diligence. Treat them as the all-important grain of sand in the oyster that produces the pearl!
- 4) **Emphasize the vital importance of leadership gifts;** these and these alone create a sense of optimism, confidence, credibility, determination and resolve. Leadership gifts elegantly and pointedly dispel fear, skepticism and doubt concerning the attainability of a project; receiving the \$1 million top leadership gift would have a transforming, catalytic and electrifying effect on the community and a wave of gratitude;
- 5) **Undertake a major effort to more comprehensively identify those capable of major gifts, followed by a systematic process of cultivation to build “ownership” of both the Campaign and Strategic Plan;** Because Nativity has not needed to speak to people of significant means for significant gifts, little is known of their philanthropic interests; motivations and affiliations;
- 6) **Craft a strong case statement for the Strategic Plan;** once the goal of the campaign is well defined, each parishioner must be given the information they need to become an advocate for the Strategic Plan; The case statement will need to convey the needs of the parish, the benefits to the community if the campaign is successful and also articulate a compelling vision for the future of Nativity;

- 7) **Select the Capital Campaign Committee chairperson and committee members very carefully – probably not more than 6-8 people;** Remember that these people, if possible, need to be the most effective leaders in the parish; ideally, the Campaign Committee gives a significant gift to the campaign goal; the Campaign Chairperson should be in the leadership gift group, articulate, effective in asking for gifts and able to reach out both to those who support and to those not yet on board; high energy, the ability to communicate confidence and resolute determination will be essential to success;
- 8) **Begin the capital campaign with a “quiet phase”, which begins after the Campaign has been approved in a parish assembly. The quiet phase consists mostly of personal meetings with parishioners to learn their concerns and explain the Strategic Plan; if the timing is appropriate, then those who are engaged in the campaign respectfully request permission to discuss their possible participation in the capital campaign. The quiet phase may actually continue to the very end of the entire campaign. At a time deemed proper by the steering committee, the “public phase” will commence. The public phase begins when everyone and every organization and ministry of the parish is invited to participate in the *privilege* of building up the ministries and the facilities of Nativity – God’s Church. Following the fundraising phase, begins the “harvest phase” when those who pledge to the campaign receive regular bulletins of progress and humble reminders concerning the three-year pledge, though some donors may have a different arrangement with the parish.**
- 9) **Continue to work on stewardship, improving annual giving by parishioners and conscientiously teaching the biblical principles of sacrificial and generous giving according to ability;** Stretch the giving perceptions and practices of the parish;
- 10) **Continue to provide highly visible financial controls and communications procedures;** These competencies build confidence and encourage investment.

**EVERY GIFT WILL BE RECEIVED WITH GRATITUDE;
ONLY GOD AND THE DONOR KNOW IF IT’S SACRIFICIAL.**