



CAPITAL CAMPAIGN PLANNING STUDY

PREPARED FOR

HOLY TRINITY GREEK ORTHODOX CHURCH

RALEIGH, NORTH CAROLINA

JUNE 25, 2009

Submitted by (V. Rev.) Fr. Anthony L. Scott

Stewardship Advocates

TABLE OF CONTENTS



Table of Contents	2
Essentials for Success	3
Scope and Method of the Study	4
State of the Parish.....	5
Receptivity to the Project.....	18
Practice of Stewardship and Availability of Gifts	26
Internal Development Assessment.....	35
Specific Campaign Opportunities	37
Specific Campaign Challenges	39
Recommendations	41
Exhibit A - Participants in the Planning Study	44
Exhibit B - Major Donor Prospects (given to senior leadership to preserve confidentiality)	
Exhibit C – Statement of Need	46
Exhibit D – The Focus Groups	49
Exhibit E - Unedited Advice	58

ESSENTIALS FOR SUCCESS



This Capital Campaign Planning Study was conducted to assist Holy Trinity Greek Orthodox Church in Raleigh, North Carolina (Holy Trinity) to evaluate the status of several key elements necessary to conduct a successful capital campaign building.

- The membership of the parish must be “sold” on the benefits of the project.
- Consensus must be attained through two-way communication with the members of the community on key aspects of the proposed plan, including scope of the project and design features.
- 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.
- Major donor prospects must be identified, qualified, cultivated and solicited.
- Major donor prospects must be matched to the standards of giving required for success.
- Key leadership must be recruited, empowered, equipped, coached and supported.
- Holy Trinity must possess sufficient volunteer and staff support and technology to attend to the details of the campaign (management of information, communications, letters, securing appointments, pledges, gift recording, acknowledgment, etc.).
- Influential and dedicated volunteers together with pastoral leadership must step forward to lead and to work closely with counsel in personal visits to prospective donors to attain a successful result.
- The entire capital fund raising effort must be conducted in such a way as to enhance the spiritual well being and vitality of the community, thereby enabling Holy Trinity to fulfill its mission in fidelity to Father, Son and Holy Spirit.

SCOPE AND METHOD OF THE STUDY



One hundred and two (102) personal interviews and surveys were received including one “Anonymous” participant for a total of 135 people for the Capital Campaign Planning Study by the end of June 2009 by Fr. Anthony Scott of Stewardship Advocates. While on site, Fr. Anthony also facilitated two focus groups consisting of 41 participants. Some of the focus group participants also completed surveys. This is an excellent response from the parish. Participants included a cross section of the parish: members of the Parish Council, clergy, officers, founding members of the parish, and other key parishioners whose support is considered vital to the success of this study and the successful conclusion of the campaign. (The list of interviewees and survey respondents is appended to this study as Exhibit A.)

The consultant spoke personally with the senior Pastor, Fr. Paul Kaplanis, the Capital Campaign Planning Study Chair, George Pappas, and the President of the Parish Council, Penny Gallins, listening carefully to their comments and recording the steps taken thus far to develop the project and also on the general state of the parish. The consultant wishes to extend his gratitude to George Pappas and the members of the Capital Campaign Planning Study Committee, whose close and very competent assistance made this study possible.

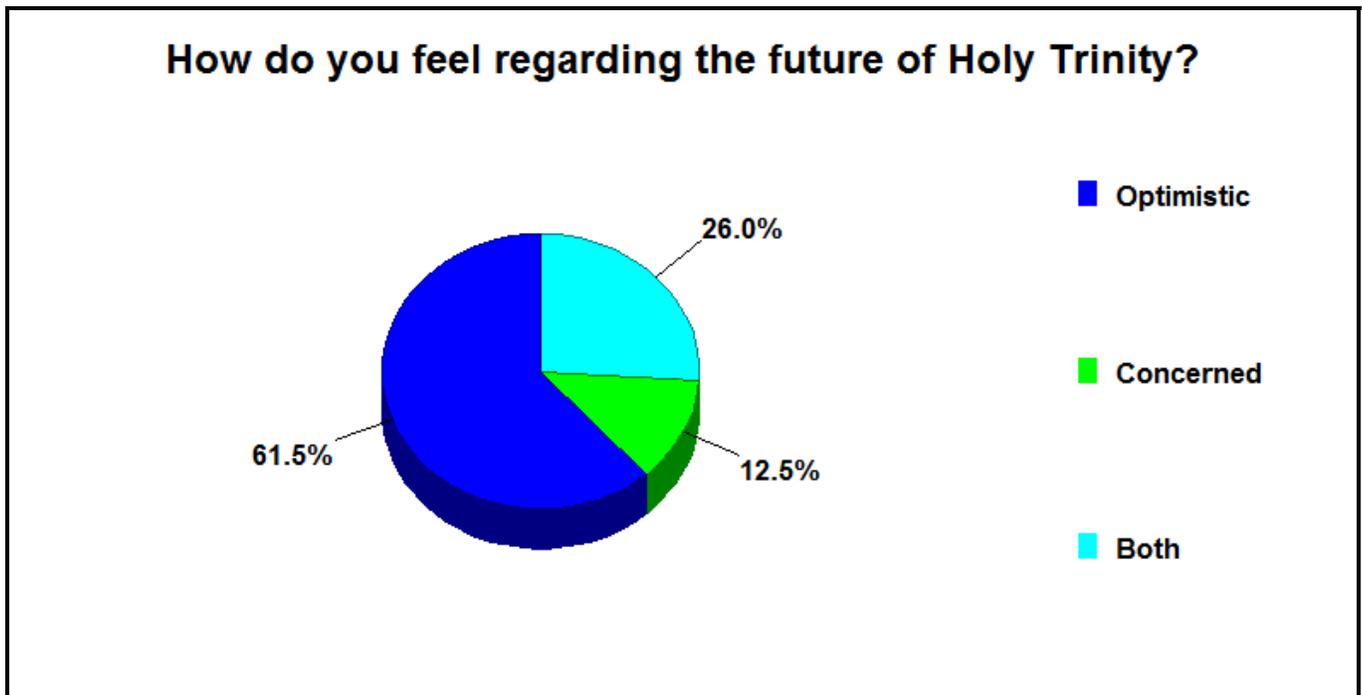
To maintain confidentiality, comments and quotes included in this assessment are not attributed by source. Interview sheets and the personal notes of counsel have been placed in the confidential files of Stewardship Advocates.

STATE OF THE PARISH



In order for a capital campaign to be successful, it must aim to raise funds for the right cause, asking the right people at the right time for the right resources. The general *climate* conducive to successful fund raising must be ascertained. For this reason, it is important that Holy Trinity take account of the state of the parish before launching a campaign. Each interviewee was purposefully asked a very broad question: “Concerning the future of the parish, do you feel optimistic or concerned or both?”

Opinions generally expressed optimism. From 104 respondents (some couples registered different responses), 61.5% described themselves as optimistic. Twenty-six percent felt both optimistic and concerned. Only 12.5% felt only concern.



When asked to list the greatest strengths of the parish, the clergy, and especially Fr. Paul, were most often cited, using descriptors such as “good leader”, “strong priest”, “sets a good example”, “good communicator”, “articulate”, “brought a lot of new people in”, “can reach young people”, “wonderful person”, “good shepherd” and “amicable.” The next most often cited strength was the community itself – especially the growth in membership. Here, descriptors included “many new people”, “Church growth”,

“diverse”, “talented”, “many young families”, “multicultural”, “numerous inter-Christian marriages”, “cohesive”, “dedicated”, “vibrant” and “welcoming.” Other cited strengths included “the Festival”, “strong Parish Council”, “Philoptochos”, and “outreach programs.”

All comments by the participants identifying strengths are listed below:

"We are fortunate to have two priests and the deacon who are always available to their parishioners. There is also strong leadership in the Parish Council. The parishioners are a strength because we are diverse and bring many talents to the Church."

- Fr. Paul, a good Parish Council, many professional people who know how to do things.
 - Many new people have come into the parish. They bring new ideas. The majority of the people are doers who want new programs and new facilities. We are multi-cultural and a very diverse parish. For the most part people are interested in their spiritual life - they want to see these types of programs. People here support philanthropic causes. Philoptochos is reaching out to help people in the community beyond the membership of the parish.
 - Very strong priest. We don't like Fr. Paul - we LOVE Fr. Paul. Good Sunday School program. Good social programs. We have a very active fund raising group with Philoptochos.
- The people have really embraced me and accepted me into the parish family. Traditional family values are passed down to the younger generation. There's efficiency about how the parish is run - not in a cold way but in a good way. This is due to Fr. Paul and Harry Costa. The parish has become very diverse in the past five years. Generally, we are very accepting of new people. We are very transparent as a parish.
 - We have an excellent priest. We have a very young and active board.
 - The people and the fellowship that we enjoy. People basically get along - especially we Greeks! Our festival is a strength. There we see everyone pulling together. Our organizations are strong through good leadership. Fr. Paul is a very good leader. He keeps his temper and I don't know how he manages to do this! He supports all the organizations and follows through. He does a wonderful job at the altar. We have done a good job getting others to join. This is one of the things that make our Church great. Our Philoptochos is very strong. We argue and fight but we always stand together on what's important.
 - We are a growing parish. We are bringing in a lot of non-Greeks and this is healthy for us. Fr. Paul is a strength. He is a good communicator. He does not pontificate. He is articulate and can reach young people. This is critically important.

- We have a very nice sense of community. We are not completely North Carolina-centric. The priest is key. We have one who inspires us to come to Church.
- The influx of new families. The growth since I have been here. The programs and the ministries have grown. It's a very living Church that is moving forward. We have good leadership.
- Fr. Paul is like no other priest we have ever known. He's a wonderful person.
- People have been willing to work and to give of their money.
- We're growing. More people coming in, though I do feel a little nostalgic as the Greek cultural element slowly fades.
- We have excellent clergy. The history of this Church in terms of the people in the community - they've made lots of sacrifices. There is a spirit in this parish of accepting new people and converts. The community here really reaches out to accept.
- The attendance and support of the people.
- The priest is a pillar. He's a very good guy.
- Fr. Paul and the way that he manages to hold the parish together. He's a good shepherd. We all respect him for that. There are many committed people in this parish.
- Our greatest strength is Fr. Paul and more recently, Fr. Theodore. Our diversity is a great strength. Fr. Paul is very inclusive.
- The historical strength of the community. The cohesiveness of the community. The geographical location of the parish in this part of the country.
- Fr. Paul is the number one strength of this parish. We've seen a lot of younger people coming in. We're growing. We're highly diverse.
- There is money in the parish. Fr. Paul and Fr. Theodore are strengths.
- Fr. Paul is the best priest I have ever met. Our Church is full. That is a positive. I've been to too many Churches in Greece that are empty. We have no debt. This is good, not bad.
- The Church is doing well right now. We have a wonderful priest.
- We have a wonderful young element that brings their children to the Church.
- We have an excellent priest and assistant priest. It's a welcoming community.
- We are growing. I came here in 1991. There weren't many children in the Church then. We are also very diverse.
- We have a lot of young professional people that are committed to the growth of the Church both in programs and services.
- The dominant strength of the parish is the priest. There are a lot of people here who are absolutely committed to our faith.
- One of the strengths is the deep roots of the community. The leadership, specifically Fr. Paul, does an excellent job. We have many friends in the parish. The parish meets the needs of all age groups.

- We are a very caring, diverse, committed parish in general. There is a great love for the cultural and historical context of the Church. We are located in a rapidly growing area.
- Much of our good estate as a parish is due to Fr. Paul's work. He sets a good example and attends to everyone's needs.
- Fr. Paul is one of the main reasons that the community has grown the way that it has. The diversity is healthy for us. There is a relatively good sized group that donates a lot of time to the Church.
- We get along relatively well. We get good participation. The Church is full.
- The Church is full and it's wonderful.
- Fr. Paul. The community as a whole is very good.
- The people.
- Fr. Paul is a strength of the Church right now. Presbyteria is also a strength. Lots of youth activities. We've had good assistant priests as well.
- The willingness of the community to work together. Fr. Paul is a strong reason why we come together. He's very amicable.
- Close knit community.
- Very involved and enthusiastic parish with consistent priests who stay there. There is a large youth population. The Greek Festival.
- Parish has strong fundamentals. Dedicated and hardworking leadership from Fr. Paul and the other clergy. A decent percentage of very active and involved parishioners.
- Greek Festival
- Continues to gain new parishioners. Forward thinking parish. Warm welcoming parish. Numerous inter-Christian marriages.
- Continued spiritual guidance. Growth. Habitat for Humanity.
- Good priests. Many hardworking parishioners.
- The parish is very welcoming and helpful.
- The clergy - we are fortunate to have two priests and the deacon who are always available to their parishioners. There is also strong leadership in the Parish Council. The parishioners are a strength because we are diverse and bring many talents to the Church.
- Creating a good atmosphere for spiritual growth.
- People and Priest - a living community. Strong faith. Good management.
- Strong leadership (clergy), diverse parish, many supporters and volunteers.
- Outreach, more English language, education of young and old, respect and understanding, spirituality, encouragement
- The greatest strength of this parish is Fr. Paul - because of his love, leadership, humility, ability to bring people together, his personality, the atmosphere he creates, his love for everyone. Next, the

people of this parish are extraordinary - from the committed, immensely hard working members of the Parish Council and member of Philoptochos, Sunday School staff and many more people who willingly give much time and talent to the Church. We have been blessed by the caliber of our assistant clergy. The love our clergy have for one another is very evident and a beautiful example for us. We have great programs for the children and the youth. The children love Fr. Paul. The youth are given many opportunities to be involved in the Church. We have a very talented and dedicated choir director and beautiful choir. Finally, the friendliness of our parishioners and our love for one another (for the most part)!

- Conveniently located. Choir (with organ/organist), Fr. Paul and Fr. Theodore.
- Descendents of older, founding families remain and have pride in knowing their grandparents built the first Church.
- It is strength to accomplish prospective challenges.
- Inclusiveness. Loving community. Exceptional priest.
- Many faithful. Many hard-working. Many creative.
- The priests, deacon, Parish Council, devout parishioners, choir, cantors.
- Growing membership. Humble, yet strong priest.
- Long standing and established. Great leadership and well respected clergy. Many outreach ministries.
- Our clergy!!!! Our outreach ministry. The dedicated few. Philoptochos.
- Increasing population of Raleigh. Increasing population of Greek/Eastern Orthodox. Wonderful spiritual leadership. Active lay leadership.
- People - friendly, kind, wonderful people. Priest! Excellent and wife! Philoptochos - strong group of hard working women. Greek Festival, Coffee times, Book studies.
- Diversity of Orthodox parishioners (multicultural).
- Priest. Passion of parishioners, various Church organizations and activities, outreach.
- Leadership of Fr. Paul. Cooperation between clergy and laity. Spirit of brotherhood among laity. Longevity of core membership.
- Growing community. Young age of many parishioners.
- Community; strong social environment; young, growing families; solid programs; dedicated volunteers; wonderful priests and staff.
- Growth of newcomers to our Church.
- We share the love of Christ. We have worked together through some tough times in the past.
- Many longtime members. Growth in new members.
- Strong leadership from Fr. Paul.
- Priests and deacon are vital to the future of our parish and our greatest strength.
- Fr. Paul!

- The pan-Orthodox focus. In a growing area. Father Paul.
- Fr. Kaplanis is an exceptional leader. There are some very devoted parishioners who give generously of their time. The Church is rich in history and is a fixture of Raleigh
- Wonderful priests and a great deacon, chanter, choir. More young families with children. Our older folk are well into 70's and 80's. Families coming into parish are very capable folks.
- Clergy, ministries, optimism, involvement.
- Diversity. Strong leadership with Parish Council and priests.
- Diversity. Children. Families. Older leadership and culture.
- Most people love this Church and the priests and want to see this happen. There are families here that have roots going back to the beginning of Holy Trinity and work well together.
- Parishioners are very willing to donate their time.
- Great leader (Fr. Paul).
- Fr. Paul is a fantastic priest and leader for our community. The increasing amount of young people attending Holy Trinity is also very encouraging to see.
- Dedicated and working congregation. Excellent clergy. Very capable leadership. Rich generational and ethnic mixture of congregation.
- Wonderful priest. Many organizations available to all ages. Great interest by the community in following and promoting the Orthodox Faith. Willingness to assist needy causes including non-Orthodox causes. Many people work very hard in the kitchen. The Parish Council's many responsibilities are carried out with care, devotion and success!
- Strong family ties. Father Paul is a wonderful head priest. Very friendly atmosphere.
- Membership has grown. Our clergy is tops. Young families. Excellent Church life.
- Father Paul. Fr. Theodore and Chapel for the children. Youth programs (GOYA, Preschool).
- Our priest and all of the assistants are excellent. Greek traditions are retained in the Church. English is also used to keep the interest of our children. Many dedicated and hard-working parishioners.
- Spiritual depth. Breadth of ministry. Engagement of community. Absence of petty conflict.
- Good Christians dedicated to serve God and our growing community.
- Open vibrant community. Leadership of the priests. Diverse parish family. Wide range of ages.
- Father Paul. Mix of young/old families. Importance of faith/Church in people's lives. Hard working people.
- At Holy Trinity, I see and feel a sense of community and connectedness.
- Compassionate, hard-working clergy. We appear to be getting better at reaching out in timely fashion to the sick/ailing/needy among us. Our stewardship committee is knocking themselves out trying to get people together more often for fun days/nights of fellowship. Attendance is still rather poor, but I give them tons of credit for trying and executing well. The Fathers persevere with occasional weekday liturgies even though the attendance is poor.

- Sunday School - active youth. Active community groups. Festival.
- Father Paul. Administration of the Church. The growth in parishioners. Great fund raising.
- Friendly atmosphere. Wonderful, Orthodox Christians.

Having expressed love and great hope for the parish and its leadership, each interviewee was asked to note the most significant weaknesses or challenges that stand before the parish – especially in light of an ambitious fund raising campaign. The most often identified challenge was financial: “the recession”, “the poor economy”, “people losing their jobs”, “many retirees on fixed income”, “declining home values”, and “not a wealthy community.” This cited challenge was often the reason respondents chose “concerned” in question #1 above regarding the future of the parish in light of a capital campaign.

Other cited challenges are very typical of parishes – even those touted as exemplary Orthodox communities – “factionalism”, “difficulty recruiting enough volunteers”, “inadequate participation in worship and fund raising events”, “inadequate facilities”, “not giving according to Biblical standards”, and “differing priorities among some older parishioners and younger, more progressive younger parishioners.” While not lessening the importance of continually addressing these parish challenges, it is important to understand and accept that these have occurred in every parish in every era in the history of our Church. One needs only to read the Acts of the Apostles, St. Paul’s letters to the Corinthians or the history of the Ecumenical Councils! Unfortunately, some parishes are overwhelmed by these challenges to parish life. In these instances, the gospel, mission, worship, spiritual life, and service to the poor and needy become secondary priorities. Thankfully, this is not the case for Holy Trinity.

All comments by the participants identifying challenges or weaknesses are listed below:

- I would wish for more participation by many of the new people who come for weddings and baptisms.
- Multiculturalism can also be a challenge. It's predominately people of Greek heritage. We have a challenge with transition. Lots of people moving in and out of Raleigh Durham.
- We don't have any big bucks people in our parish. We haven't been building up a construction fund through the years leading up to this campaign.
- We have two major groups - one is more conservative, more established and somewhat less trustful of how things are being done by Fr. Paul and the Parish Council. The other tends to be younger, more progressive and more willing to compromise in order to move forward.
- I'm concerned about our ability to raise this amount of money.

- I don't feel that we have prepared to undertake the financing and building of this church. We have not diligently prepared a financial plan for the building program. There should be a written plan for how this will be undertaken. The pride of the Greeks say that no matter how old you are, you work for the festival. We should do like some of the other Greek parishes and hire a few people to do some of the more difficult work.
- My concern is that people may not be as committed as we would wish them to be. We are also in a difficult situation with the economy.
- We have a shortage of volunteers to help with certain activities. One example is our nursery. We're outgrowing our present facilities - this is not a weakness but a challenge.
- A lot of us feel that money has not been spent wisely over the past several years. They want to do this grandiose program when the economy couldn't be in worse shape. How will we pay for this after we build it?
- The project has gone on so long that the dollar cost has risen.
- Getting more people to share more of the burden of the volunteer and financial need to support the work of the parish. We are stretched very thin on actual church employees.
- We could have more programs. The sanctuary is too small.
- We rely too much on the older ladies. We need the younger women to come in and do their share.
- We need to improve upon stewardship. We only get 300 forms in each year for the 400+ families that we have.
- Our facilities are very inadequate. It's definitely time to build.
- Maintaining the cohesiveness and feeling of family. Figuring out how best to deal with the growth that is occurring.
- A few people do very much but volunteering and service and giving time and talent is the privilege of everyone.
- We have some old timers who could support the church in big ways but they like to keep things the way they were and are not being so welcoming to newcomers.
- We are a very transient community. What happens to five-year pledges when people leave? Banks are very reluctant to make jumbo mortgages or commercial loans - actually, they are more than reluctant. My experience as a businessman is that it will be impossible to get such a loan.
- I'm concerned about the upkeep of two buildings. I'm also concerned about the present state of the economy. Many of the older people are not supporting the idea to build a new church.
- The "founding fathers" have in some degree set themselves apart from the younger folks. They have been wonderful stewards but the economy has brought a lot of concern and conservatism into their feelings about a building campaign.
- Managing the growth is a challenge. The facilities have serious limitations. We are understaffed.
- The parishioners at times do not give according to Biblical standards.
- We need to keep the Sunday School strong so that the faith is communicated to the next generation.

- One of my concerns is generational. The older generation may feel that they have given and don't need to give anymore. The younger generation, consumer oriented, may feel that they have nothing to give. Failure of this project might cause Fr. Paul to experience a deep disappointment that would cause him to leave.
- The lack of financial support by some families is of concern to me. There is a lot of factionalism, which actually exists in all parishioners, so our diversity can also be a challenge.
- I am not Greek and though I have been here 20 years, it's still hard to feel welcome. This has greatly improved with Fr. Paul here but I still sometimes feel that way.
- Income growth has not kept up with our membership growth. Neither have we seen a growth in volunteering coinciding with the new membership that we have.
- My biggest concern is people not wanting to do their part in terms of giving money.
- We have three factions in the parish - the people who built the church, the people who are moving here from other places and then the Greek faction that is here half the year, then in Greece half the year. I don't think people really understand the concept or practice of stewardship.
- The people. Some of the older members are afraid of change and of trying new things.
- I feel that if the service was more in English this would help make the church even more welcoming than it already is.
- The old 80-20 ratio. This is where 20% of the people are doing 80% of the work. We need to do a better job encouraging people to accept more responsibility.
- Collecting funds during this time.
- We are taking on a very expensive project. Raising the money for the new church, etc, in a time of economic difficulty and uncertainty.
- We are not as welcoming of newcomers as we could be. I've lived in Raleigh since 1993 and I've never really felt I belonged as a single adult in this parish. People have their social cliques. This is one of the primary reasons I do not attend this church often.
- The weak economy. The increasing Archdiocese dues. Loss of tradition and heritage.
- Spending more money than the parish can afford. Over expansion. Not all families can contribute.
- We could be more efficient in the use of funds for activities and programs.
- I don't think everyone believes that we need a new church. Also, I know the stewardship committee has trouble each year with getting people to pledge. People give, but don't want to pledge a definite amount, which makes it hard to budget. People need to know the importance of pledging, especially for this campaign.
- Lack of facilities. People sometimes not willing to contribute. Need more volunteers.
- Facilities - not enough space and aging buildings. How to keep our youth engaged and pull them back - most move away and don't come back.
- Need for more space - from the sanctuary to the chapel to the kitchen, classrooms and library. The challenge right now is: first the economic climate and second to bring everyone on board to the building of a new church. People have shared with us their doubts that this can be done.

- Trying not to rush this project beyond the capabilities of the parishioners.
- Aloof clergy leadership. Insulting office staff - secretary - has pushed a lot of members away - many with deep pockets. Newer families appear to have no respect for founding families and feel that they can do everything themselves.
- We don't feel a new church is necessary.
- The context of the economic conditions are affecting all aspects of living.
- Financial support challenges. Many non participating parishioners. Limited facilities.
- A few pessimists can spoil a positive attitude.
- Meeting the expenses of the parish.
- Planning to build a huge new parish, we have spent thousands of dollars and haven't saved a dime yet!
- There are still small groups of members that do not feel that we have a need. I believe this is the way of justifying to themselves that they don't need to contribute.
- The dedicated few - somehow need to involve more people into the core. The low monetary commitment to the parish by what seems to be most of the people.
- Current economy. Outreach programs.
- Money.
- Large number of immigrant parishioners who are reluctant to give monetary support to the church. Because we are multicultural in our parish make up, other than Greek. Perhaps we may not get as much support from the other Orthodox members for our more "Greek" Orthodox church.
- Fear among some due to the economy. Parishioners that think "small".
- Unrealistic view of current economic times. Uncertainty as to the fundraising ability. Priorities differ between older and young members, i.e., older member concerned with costs of aging, less earning power, etc., while younger parents must raise and education families, etc., which leaves a gap between "wanting" and "being able" to build. Little has been said about the cost of maintaining the new, larger facility. Currently, we hear at the end of the year that we are short of funds for maintaining our current, smaller facility. Therefore, how can we meet operating costs?
- This is an aggressive fundraising goal during challenging economic times. Church isn't that well connected to affluence in Raleigh community.
- The stained glass windows on each side of the church could be removed and enlarged on each side for more pews at much cheaper cost. There is no need to go ahead with the plans as proposed.
- Be careful not to put one's want before the common good of all.
- Concerned about cohesiveness - getting old and new members to interact more together. Getting more youth to be involved.
- There are many members who come to church on special occasions or feast days. We don't have enough volunteers to help with the Festival.

- Greatest challenge is accommodating growing parish in our current church.
- Few adult events, e.g., dances.
- My sense is that this is a parish without broad-based financial base or "flex".
- People don't support the church in their pledges. They don't realize the funds that are needed to support their needs and services.
- Getting total parish commitment. Getting the majority of members involved.
- Factional subgroups. Leadership at times appears "cliquish", need for more transparency.
- The challenges are financial - how much can each give to pay off \$6-8 million. It's scary!
- Lack of financial commitment to the needs of the church.
- Many young families with very young children in school and college age. Tuition very high and so is the cost of living.
- A small but vocal minority has dampened enthusiasm at General Assembly meetings with their negativity.
- We are relatively new to the parish and are not aware of any real weaknesses. However, regarding challenges, we sense that a significant number of parishioners may have financial difficulty supporting this major endeavor.
- The terrible economy. The job situation worries everyone but hopefully if this improves people will be comfortable in pledging funds.
- Earning money for the new church may be an issue - weakness - outgrown our current church - bathrooms need remodeling. Church is very crowded at times - especially Easter.
- The current economy. The diverse employment factor of our people, retired members.
- Lots of people who only come to church on holidays and feast days and don't contribute enough. It seems like the same people are the workers and givers.
- Many people do not honor their stewardship obligation. Dedication of some parishioners is limited, expecting others to carry the load. The economic situation.
- Physical plant. Priest needs more administrative support for size of the community.
- Not all parishioners are active in fund-raising efforts.
- Raising money to expand. Getting more volunteers seems an issue.
- Control by establishment (older generation) often negative, pessimistic with limited world views. Internal politics.
- The economic situation may keep us from moving forward at this time. I see a lot of elitism and a sense of "I did this for my church so pin a rose on me and I won't forget it." I sense a disconnection between the church family and many new parishioners who are treated as outcasts. Overly compassionate clergy to the point that bullies are allowed to run free in the kitchen and organizations. Smart, educated people get tired of being told to "suck it up" and "be the bigger person" year in and year out. My time is too valuable to participate in poorly run, inefficient organizations where I'm yelled at regularly. Micro-managing clergy, although I understand and

sympathize that with less than reliable help, one gets use to doing everything oneself. There is not a vibrant Sunday School program. The "successful Pre-School" is struggling to attract our own families to the program. Our Greek Festival may be "the most successful ethnic festival in Raleigh" but we only clear 30 cents on the dollar. We have gross management problems that are turning people off from participating. HOPE and JOY participation is decreasing and do NOT "emphasize spiritual growth through service to the community." Everyone wants to be a leader (SEVENTEEN Philoptochos Board members?) The Parish Council is practically invisible. Why aren't they greeting people? Welcoming visitors? Introducing new members around? Not using people's talents appropriately.

- Welcoming Committee not effective.
- Present economy. The growth of parishioners and limited resources.
- Not enough large donors. Not enough fund raisers.

From the perspective of the proposed capital funds drive, each of the strengths that are cited above can be incorporated into the case for giving to the campaign. The identified weaknesses or challenges, especially the economic conditions of the country, are daunting – this will come as no surprise to the members of the parish. However, the consultant was inspired by one comment that was made in one of the Focus Groups. (Paraphrasing) “I attended a meeting in 1931 when the subject was the need to build a new Church. This was in the midst of the Great Depression. Things were far worse then and much of the discussion was about the poor economy, people losing their jobs, etc. Yet, we did build a new Church then and we can build a new Church now.”

Communications and Financial Management

A Church that is prepared for a major capital campaign must have solid communications vehicles in place, not only to share news and announce progress, but also to reflect input from the community on an ongoing basis. Fortunately, with 96 surveys and interviewees registering a response, general parish communications were accorded a very good 8.3 on a scale of 1-10 with 10 signifying excellence. Of course, communications can *always* be improved upon.

One of the top reasons for donors choosing to give a major gift to any nonprofit institution is their trust in the sound financial management of the organization. A solid track record of financial accountability and competency provides a foundation of trust and confidence to the donors who will be asked in the coming months to make a significant charitable investment in the future of the parish. Maintaining the parish standard of transparency and continuing to provide accurate financial records and timely receipts will be

increasingly important to the capital campaign. In light of this, parishioners were asked to assess the financial management of the parish on a scale of 1-10. The averaged number from 100 respondents was a very acceptable 8.2. It will be extremely important to continue to exhibit improvement in this area of Church management and a high degree of competency going forward.

RECEPTIVITY TO THE PROJECT



The following text was distributed to the entire mailing list of Holy Trinity, describing the need to build new facilities:

Our Parish was founded in the 1930's, when Raleigh was a small capital of the mostly agricultural state of North Carolina. From these beginnings, Holy Trinity was able to grow and prosper by meeting the spiritual needs of its parishioners. We have always been known as a dynamic parish. When we built our current complex in the late 1970's and early 1980's we were able to do so with the use of the skills of our parishioners and minimal debt. Since then we have expanded the buildings and have acquired additional lots adjacent to our original land. Our parish has no debt and is building up its reserve for our building project.

Since the founding of our Parish, we have ministered to Orthodox communities in the Raleigh and surrounding areas, as well as the local universities and homeless.

The growth we are currently experiencing has roots in the dynamic activities of all of our organizations as well as the efforts of the priests who have served with us. We are blessed to live in a city, which is growing very quickly, with bright prospects for the future. Wake County is expected to grow 3.5% annually over the next 20 years. The Philoptochos with its emphasis on serving the poor, has been here to help all those in need. The community provides scholarships for students from the parish community. The choir is a fundamental part of the liturgy of the church and contributes to the beauty of the services. There has been a vibrant Sunday School from the beginning, which has served hundreds if not thousands of children over the years. We operate a successful pre-school, which serves both Church families and the greater community. Our youth groups provide activities for our youth with an emphasis on spiritual growth through service to the community. Finally, the AHEPA family has played an integral role in our parish from its founding through today, and continues to exert a strong positive influence in the community with its scholarship program and its strong support of the Holy Trinity community.

Our Greek Festival is the most successful ethnic festival in Raleigh, and one of the most successful Greek Festivals in the U.S. for a parish our size. We have much to be proud of and much to look forward to as we work together toward Holy Trinity's bright future. We also participate in the Raleigh International Festival, which is an important community outreach program.

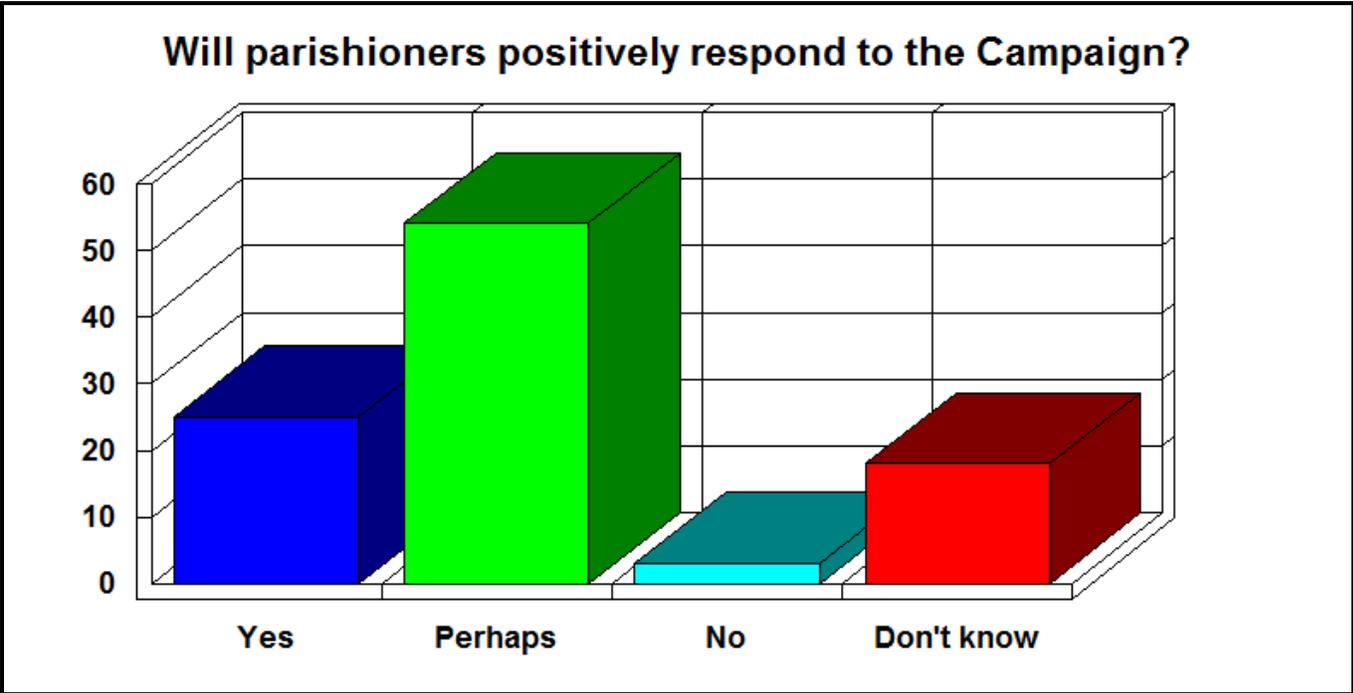
II. THE PROJECT

We own a ten acre site on Lead Mine Road in Raleigh, which gives the Church the flexibility to grow and evolve as our community grows. This existing site is split by a street, but the current building site has room for expansion. The proposed master plan, developed with the aid of Architect Christ Kamages, gives us ample room for future expansion as our parish grows, and allows us to comfortably build:

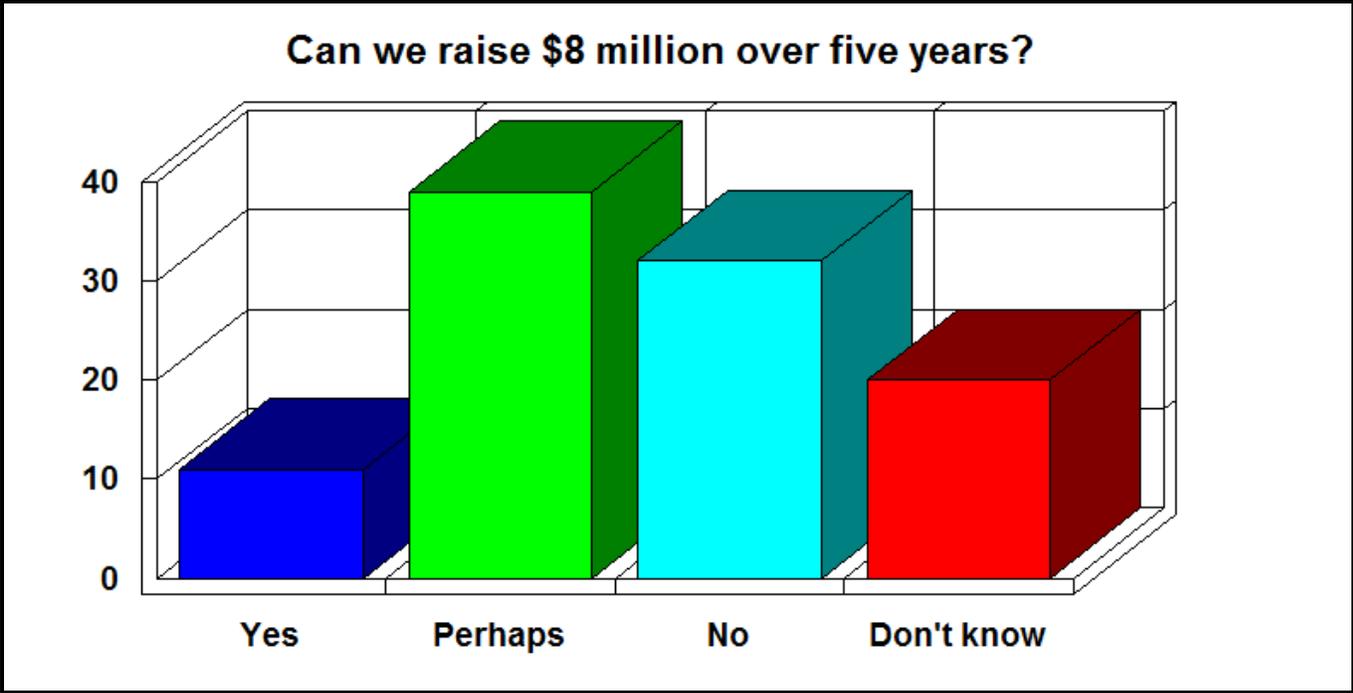
1. A new church which initially seats 550++ (A 70% increase over the current Sanctuary, which seats 325)
2. A new community hall, which seats 450, which would be adequate for larger functions;
3. A new professional kitchen to serve the Hall and community;
4. An office and administrative complex to meet our current and future needs;
5. New classrooms, which will meet the ever increasing needs of our Sunday School, Preschool and other educational programs.

(The complete Statement of Need describing the project is provided as Exhibit C.)

In light of the described need above, the next question in the survey was, "Will parishioners positively respond to the Campaign?" People were generally uncertain about a campaign of \$8 million – especially in light of the present economic malaise gripping the country. A majority of respondents –54% responded with a hopeful "Perhaps." Twenty-five percent did respond "Yes" – that the community would positively respond. Eighteen percent said that they "Did not know." Encouragingly, only 3 % said that "No" the community would not respond positively.



Continuing along this line of research, the survey then asked, “Can we raise \$8 million in five years?” Only 10.8% felt that this was achievable. A much larger group (38.2%) felt that this was “Perhaps” possible. Nearly one third (31.4%) felt that this was not possible. The remainder, 19.6%, said that they “Did not know.”



A number of comments were offered on this question.

- We are capable of doing this but I don't know if we will do this. The economy will majorly affect people's giving.
- This won't be easy. All the people who voted for this must show up and give generously.
- I'm not convinced the parish can raise this amount of money.
- This will be difficult in these hard economic times.
- This is a lot of money and with the economy the way it is, this seems like an awful lot.
- Only if someone hits the lottery, though there are a couple of people in the community who could bankroll the whole thing.
- This may take longer than five years. Consider also borrowing and funding the mortgage with festival money.
- It's a very bad economic time.
- I've been involved in three parish building programs. When the money isn't there, it gets pretty rough.
- We need someone to give the \$1 million gift. That will make the whole campaign successful.
- I'm concerned about the old timers giving generously and I'm also concerned about the newcomers giving generously.
- I don't believe we have sufficient wealth in the parish to accomplish this.
- We have professionals within this community. \$8 million is not too much to raise.
- We struggle to make our operating budget. Don't know if we can do this. Perhaps we can do this if the mentality changes.
- I feel the goal may be too high. I'm not sure we can raise this.
- Most people support but can't get their mind around an \$8 million capital campaign.
- If there is more of a larger group of determined, committed people then we might be able to raise this.
- People will be cautious in their giving due to the economy.
- There was a very strong vote to do this project but since the economy soured people may be more cautious.
- My main concern is that things are not good right now in the economy.
- Due to bad economic times and resistance from older people we may have trouble raising this money.
- I think the public phase and the quiet phase should be going on at the same time to build momentum.
- It will depend upon the success of the quiet phase.

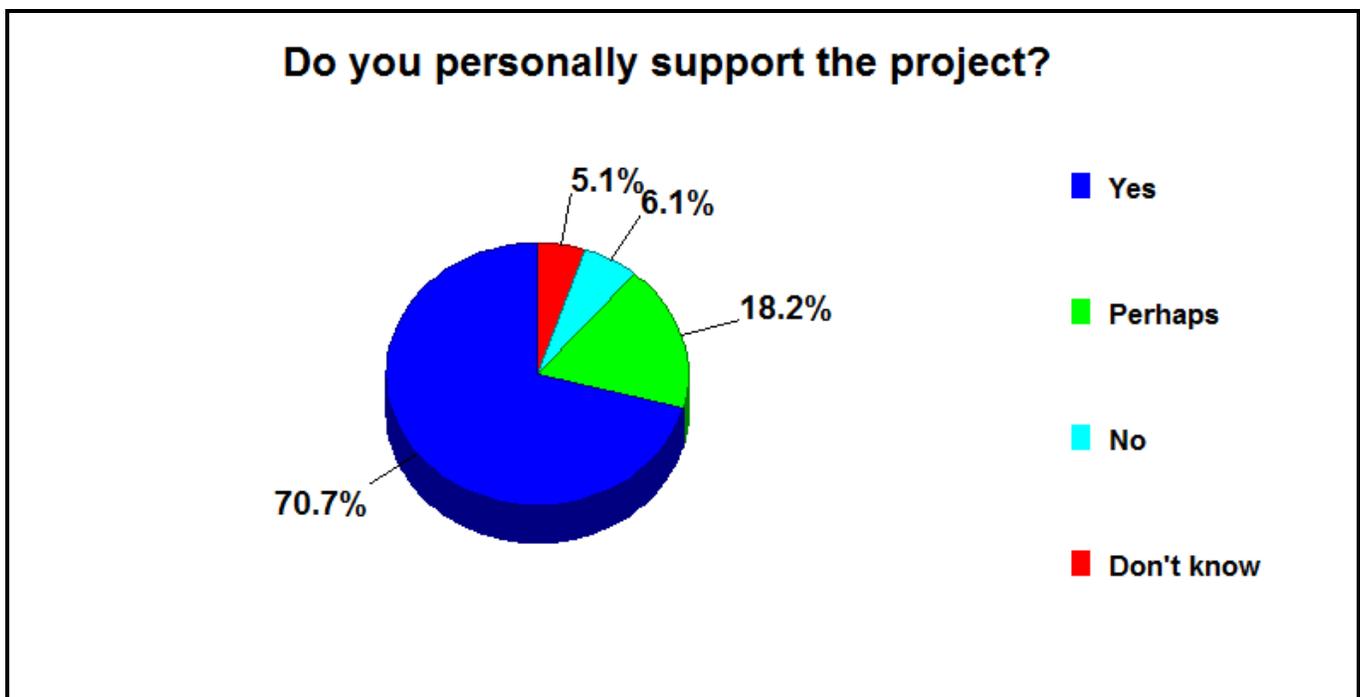
- Parishioners will respond negatively on the total proposal - too ambitious.
- The goal is unrealistic.
- I think if the economy improves, people will be less apprehensive about making a larger commitment and we can reach out goal.
- 20% of the parish will provide 80% of the funding.
- If the economic situation does not worsen.
- We can do this over a longer time span.
- It's a waste of money! If we do raise the money it should not be spent on a huge obnoxious church. What we have works good.
- I'm not qualified to answer this question.
- Maybe we can do this over 15 years.
- Based on a \$400,000 annual budget, then \$6-8 million over five year is only asking families to pledge 3-4 times their stewardship.
- If all have been hit financially as I have it will be rough
- I hope so!
- Because of the economic atmosphere - most people are scaling back.
- Will definitely be tough - need to be very strategic.
- Many of the church members barely make it each month on the social security check they receive.
- If there is enough financial support it would be nice to have a new church. However, I honestly don't think we need a new church. I think we should offer more than one service on Sundays to alleviate the crowding.
- This will depend upon the economy.
- Honestly, I'm concerned with economic current events. Set a goal of raising this over 10 years and encourage parishioners to have the church as part of their estate plans.
- We want to but the economy may prevent us.
- There is a genuine need to upgrade the church infrastructure. I am not convinced that this supports an \$8 investment, particularly given the current economic environment.
- My concern is that everyone will not give. We will be successful only if some large donors lead the way and others do the best they can.
- Although communications are strong as in the annual presentation of budget, we have no idea how much is in reserve. This is critical for such a large project.
- This project may be a difficult stretch for our community.
- It depends upon whether or not the economy improves.
- This is a very aggressive goal for five years.

- We could extend the campaign to 10 years. I don't think pledge commitments will be as substantial as they could be.
- This will take time.

Those respondents who felt that the goal was too high at this time for the community were asked to suggest what to them would be a more reasonable goal. Twenty-seven people chose to answer this question. Their responses averaged \$4.4 million campaign.

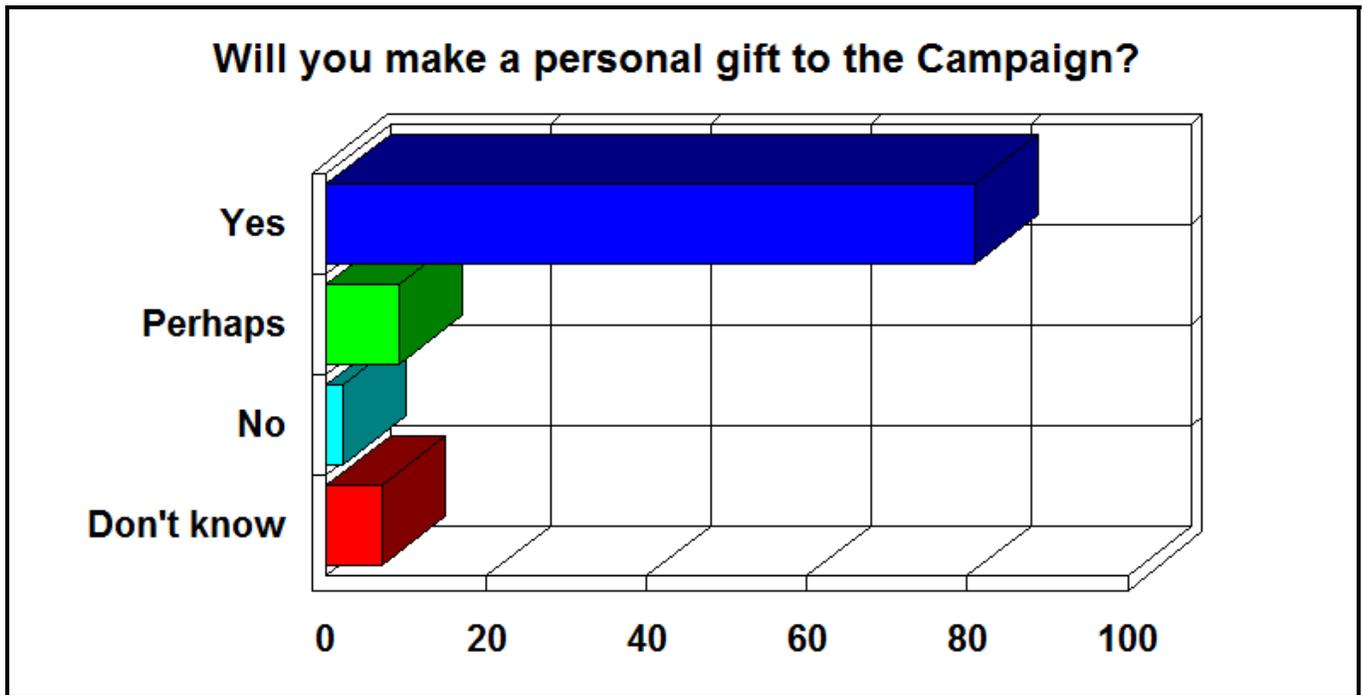
Interviewees and survey participants were asked, “What does your intuition tell you concerning the percentage of the parish that at least *morally* supports the building program?” The averaged response of the 80 respondents who answered this question was 62%.

Then participants were asked, “Do *you* personally support this proposed construction project?” Here are the responses:



Though respondents felt that only 62% of the community supported the project in general, 70.7% of those who returned surveys and gave interviews said that they personally supported the project. An additional 18.2% said that they “Perhaps” supported the project. Only 6.1% said that they did not support the project.

Counsel was encouraged by the response of participants to the next question: “Will you make a personal gift to the Campaign,” As can be seen below, only a few replied that they would not do so.



The vast majority (81.8%) said that they would give to the Campaign. Only 2% said that they would not give to the campaign. In a couple of cases, people said that they were supporting the project but difficult economic circumstances would not allow them to contribute.

STANDARDS OF GIVING



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 10 gifts make or break a campaign. The probability of success increases significantly if leadership giving meets or exceeds the standards shown in the chart below. Experience shows that although tempting and mathematically feasible, replacing the top 10 gifts with greater numbers of lower-level gifts is not practical.

FUNDS TO BE RAISED: UP TO 8,000,000

<i>Number</i>	<i>Amount</i>	<i>Subtotal</i>	<i>Cumulative Total</i>
<i>1</i>	<i>1,000,000</i>	<i>1,000,000</i>	<i>1,000,000</i>
<i>3</i>	<i>500,000</i>	<i>1,500,000</i>	<i>2,500,000</i>
<i>6</i>	<i>250,000</i>	<i>1,500,000</i>	<i>4,000,000</i>
<i>10</i>	<i>100,000</i>	<i>1,000,000</i>	<i>5,000,000</i>
<i>20</i>	<i>50,000</i>	<i>1,000,000</i>	<i>6,000,000</i>
<i>25</i>	<i>25,000</i>	<i>625,000</i>	<i>6,625,000</i>
<i>30</i>	<i>10,000</i>	<i>300,000</i>	<i>6,925,000</i>
<i>50</i>	<i>5,000</i>	<i>250,000</i>	<i>7,175,000</i>
<i>Many</i>	<i><5,000</i>	<i>825,000</i>	<i>8,000,000</i>

Sixty-nine out of 98 respondents or 70% felt that the professional methodology of capital campaign fund raising, as utilized by universities, hospitals, cultural institutions and national charities was the best way to proceed. Sixteen percent responded that "Perhaps" it was the proper way to proceed. Many parishes have historically relied upon special events for capital fund raising, but Holy Trinity is to be commended for emphasizing personal giving as a means to fund this project. This approach is not only more effective, but also more in line with Christ's teaching on how we are to use the gifts He has given us. This does not exclude also utilizing fund raising events, which can bring enthusiasm and involvement.

PRACTICE OF STEWARDSHIP AND AVAILABILITY OF GIFTS



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. Also, a campaign of this magnitude typically requires one top gift between 25-30% of the total goal.

In order to gain some important background information, counsel sought to understand the parish's self-perception with respect to the practice of Biblical sacrificial giving. Each respondent was asked to rate the parish's practice of stewardship on a scale of 1 to 10, with "10" being nearly all the parishioners are giving sacrificially or generously as taught by our Lord Jesus Christ and "1" being nearly no one is doing so. Sixty interviewees expressed an opinion citing a number. The average rating on the scale of 1-10 was 4.0.

Counsel also inquired as to parish experience in giving, raising and receiving major gifts with the figure of \$25,000 and above arbitrarily chosen. Here the averaged number was lower at 2.1 from 52 respondents. The absence of major gift giving, mentoring and parish experience will limit successful major gift fund raising in the parish. Oftentimes, it requires 1-2-3 or more years for a person who financially is completely capable of making a major gift of emotionally, psychologically and most importantly, *spiritually*, growing into actually making the major gift.

Counsel believes that *sacrificial* and *proportional* giving according to true ability may only occur rarely at the parish, as is true in every other Greek (and non-Greek) Orthodox parish he has worked in! It is also true among most of these parishes that annual giving still is made out of a small percent of "disposable income" – in other words from what's left over after all *self-identified* essentials have been paid. It is only when we begin to view generous stewardship giving as an *essential* element of the family budget and one of our *highest* priorities that we will begin to give as the Lord taught us.

“There is a conspiracy of silence in the parish on this subject of giving. It’s not easily spoken of publicly.”

Oftentimes, when gauging the practice of stewardship in a parish, we compare ourselves to other parishes within our geography and are tempted to feel smug if we are doing slightly better than our neighbors. Let's compare ourselves rather to those few Orthodox parishes that are committed to sacrificial giving where the average annual giving per family is \$2,500-\$4,000 and more, not to mention Mormon, Baptist and Evangelical giving. Our giving is also done only in comparison to fellow parishioners. Once we know the average pledge in the parish (which typically is abysmal), then we feel we have done more than our part if we give slightly more than the average. For stewardship giving to be efficacious and faithful to the teaching of Our Lord, it must be practiced as a loving, faithful and grateful response to all that God has given to us and done for us irrespective of what other parishes or people may be doing.

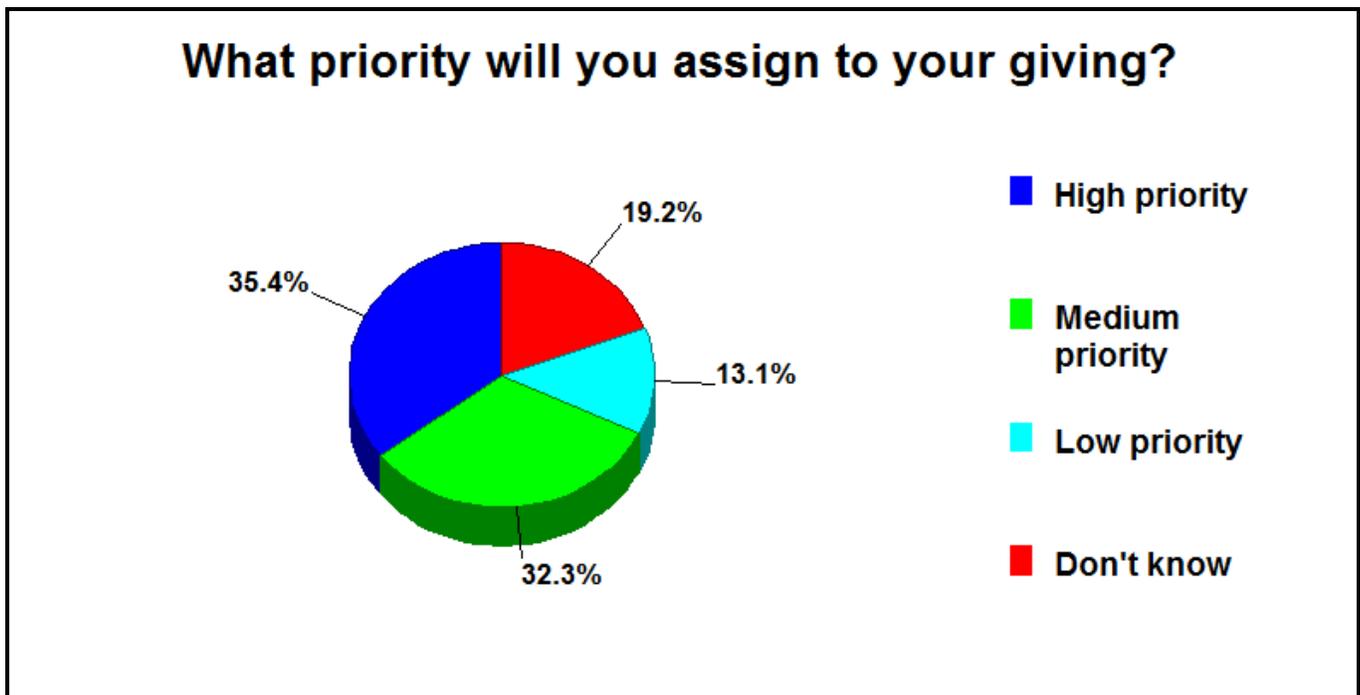
The causes for this lesser practice of stewardship are many. One cause contributing to the low level of giving in the parish may be the method by which money is raised – letters mailed out and verbal appeals. These methods are indirect and less effective than more personal methods of communication. Polite yet direct conversation with individuals regarding their giving is rare.

Ironically, the lower the stewardship number cited by interviewees, the more encouraged is the consultant. Why? It means that deep down people know that they are not giving as they should and that there is vast room for improvement. In parishes where there is a self-satisfied perception that “We are doing all that we can” or “We pat ourselves on the back when it comes to giving”, we find little possibility for growth or positive change. Arrogance, complacency and self-delusion reign supreme.

Counsel sought to learn each respondent's thoughts about the availability of gifts at the key levels required to achieve an \$8,000,000 goal. Each respondent was asked whether they believe that gifts will be available in the community as presented in the campaign gift chart cited above. Only 10 people felt that the lead gift of \$1,000,000 was available. Only eight felt that three gifts of \$500,000 were available. Twelve felt that six gifts of \$250,000 were available. Twenty felt that 28 gifts between \$50,000 and \$100,000 were available. Forty-three felt that 50 gifts between \$10,000 and \$25,000 were available.

Generally, Planning Study participants were pessimistic about receiving the larger gifts but as one moved down the gift chart of a prospective \$8,000,000 campaign, confidence grew as the gifts became smaller, even when many more of these were required. Once again, fear associated with the economy together with inexperience with major gift-giving and major gift-receiving in the parish were reflected in the uncertain and cautious responses.

Each of the respondents was asked what personal priority they would assign to this project in terms of their philanthropic giving in the coming few years. Of the 99 responses to this question 35 of the participants, reported that giving to this campaign will be a high priority among their key financial goals in the coming years. For 32 respondents it would merit a “medium” priority. For 13 of the respondents it would receive a “low” priority. The remainder either did not know or chose not to respond.



In those campaigns that do achieve their goal, typically one finds a very large percentage of participants who assign a “high priority” to their giving and very few who assign a “low priority” to their giving. To achieve an \$8 million campaign, it will be essential for parishioners to elevate the Campaign to a higher priority in their financial plan.

As reported above, 81.8% did indicate that they would make a gift to the campaign. This indicates a likely participation rate of 90% from the parish. The experience of counsel is that the final percentage of participants in the campaign is likely to achieve this higher level once an ambitious, but humble, and professional fund raising approach is applied. The laggards eventually recognize that the train is leaving the station and that they had better climb aboard or they will miss the celebration.

Each interviewee was asked at what level they would consider giving to the campaign. The total in new prospective gifts ranged from \$1,385,000 to \$1,927,500. Unfortunately, this is a low number in light of a prospective \$8,000,000 campaign. Counsel typically hopes to see a 35-45% gift intent amount from this question against a proposed campaign goal. The amount of \$1,927,500 is only 24% of an \$8 million campaign. The amount of \$1,385,000 is only 17%.

This rather cautious disclosure of readiness to give 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 (and other forward-striving Orthodox immigrants) have been very successful financially in this country; Holy Trinity parishioners are no exception;
2. It is probable that other major donor prospects, either unknown or overlooked will emerge as the campaign proceeds;
3. 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;
4. 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.

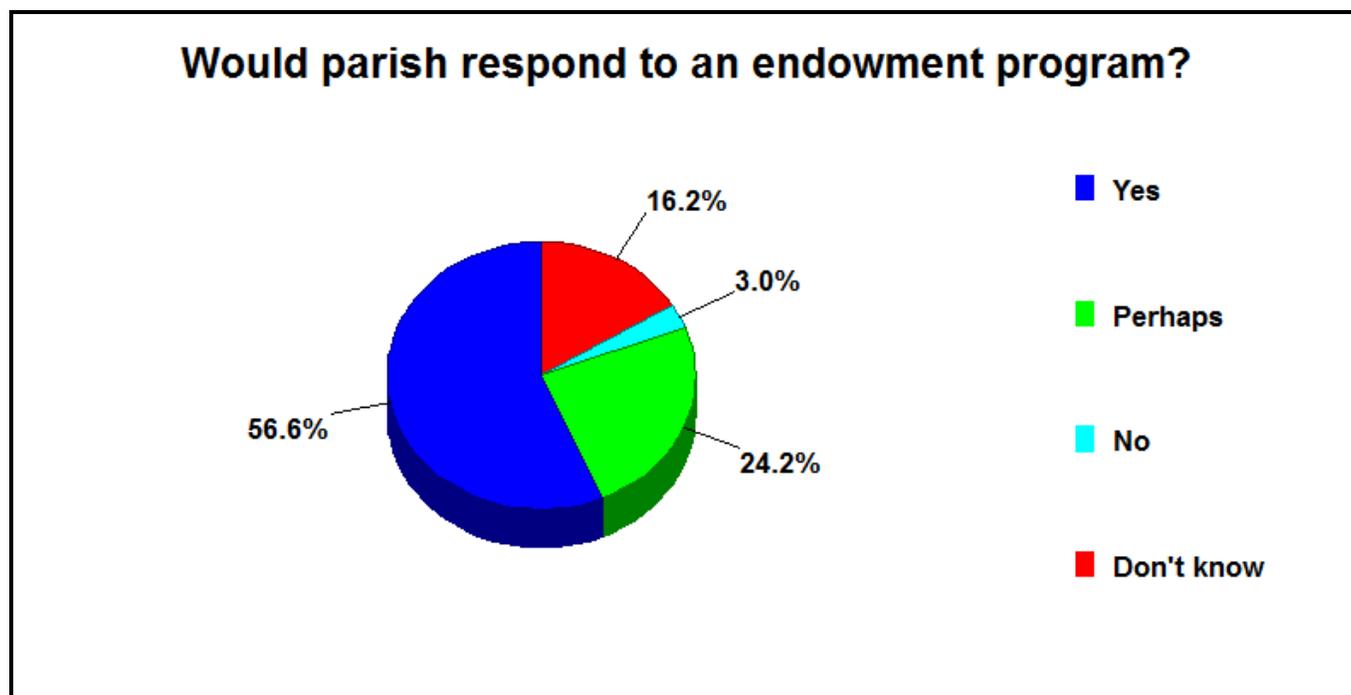
POTENTIAL GIVING LEVEL OF RESPONDENTS

<i>Amount</i>	<i>Number at Level</i>
<i>\$1,000,000 or more</i>	-
<i>\$500,000 or more</i>	-
<i>\$250,000 or more</i>	-
<i>\$100,000 or more</i>	5
<i>\$50,000 or more</i>	15
<i>\$25,000 or more</i>	11
<i>\$10,000 or more</i>	9
<i>Below \$10,000</i>	26
<i>TOTAL INDICATING GIFT INTENT</i>	66

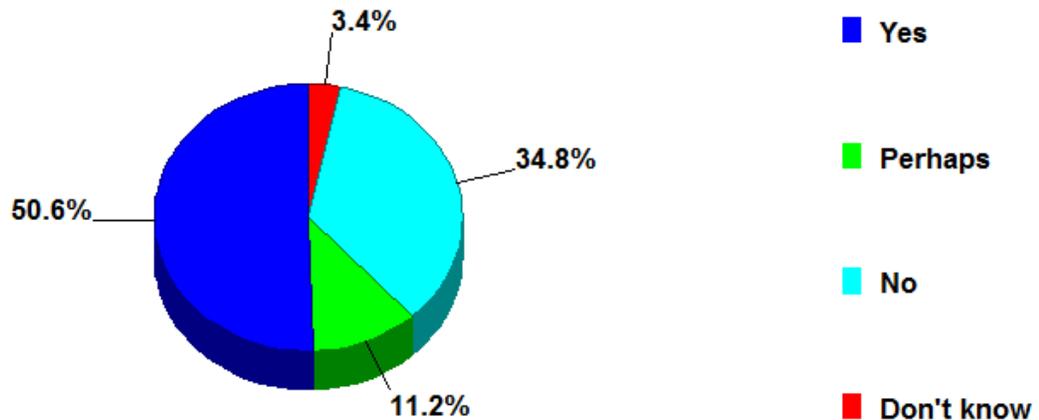
Comparing the Standards of Giving for a campaign to raise \$8 million with this representative sample of the prospective donor pool raises questions about the viability of a single campaign of this magnitude.

If this subset of the donor pool is representative of many of the remaining prospects then it is likely that significant research and cultivation will be required seeking to gain support for the project and drawing prospective top donors in to take ownership. 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. The list of prospective major donors identified by the interviewees is found in Exhibit B. However, due to the highly sensitive nature of this information Exhibit B is provided to senior leadership of the parish as a separate document.

Counsel also queried interviewees concerning initiating an endowment program for Holy Trinity, explaining that often in conversations with donor prospects in a capital campaign the question of estate giving arises. The obvious example here is the cash poor but asset rich parishioner who wants to do something meaningful but is constrained in making a large present gift to the campaign because they depend upon underlying assets to provide income for ongoing living expenses.



Would you allow a visit regarding this program?



Forty-five parishioners said that if the approach was low-key, dignified and professional, they would welcome an opportunity to discuss this with a member of a prospective endowment committee. Ten indicated that perhaps they would allow a visit. Six far-sighted respondents reported that the parish is already in their wills! Congratulations and God's blessings upon these visionary and thoughtful members of the parish.

CAMPAIGN LEADERSHIP



Success in a major capital campaign depends more on the active participation of high-caliber leadership, supported by a sufficient corps of committed volunteers, than any other factor. Having the right people in important campaign positions brings credibility and emphasizes its seriousness, attracting pacesetting donors and dedicated volunteers.

A campaign composed of a hardworking Capital Campaign Committee, highly-regarded lay leaders, an energetic courageous priest, a proactive and influential Parish Council, and well-trained volunteers, all of whom are willing to make appropriate commitments of their own and solicit proportionate gifts from those with whom they have influence, greatly increases the probability of success. Stewardship Advocates can assist the parish as may be necessary to teach, coach and provide support, but *it is the leadership and the volunteers who must give the campaign the legitimacy and impetus to carry it to victory*. Great emphasis must be placed on the preceding point. Leadership and leadership alone will successfully meet this challenge.

What is required is a very carefully selected and carefully recruited Campaign Committee of leaders – perhaps not more than 8-10 people. Members of the Committee ideally should include those with financial capability, influence and leadership abilities that command respect and inspire confidence from all groups within the community. Ideally, the fund raising committee gives 40% of the goal. The Committee must only include those who are prepared to work with counsel to identify, qualify, cultivate and solicit. A few Committee members may be included who are leading major gift candidates themselves, even if their ability to actually raise money is not especially effective.

The parish will need to recruit the best leadership in the community for this project – even if this means that they relinquish other volunteer service commitments. Those who step forward to serve must be those who have no word for failure in their vocabulary, who are prepared to do whatever is necessary to bring the project to a successful conclusion.

As the Capital Campaign Committee begins its work, it must reaffirm its commitment to complete financial transparency and accountability. Clear and consistent reporting, as well as timely and accurate gift acknowledgements, will extend donors' confidence in the appropriate use of their gifts.

It is very important that direct conversation occurs with proposed Capital Campaign Committee members regarding responsibilities before they are recruited. It will be important to confer with counsel before the selection of the Committee is undertaken. Very special leadership qualities are required for a Church to be successful in a capital funds drive.

Each interviewee was asked to suggest names of those they thought would be effective leaders for this effort, as well as names of others who should also be involved in the fund raising. All those who were mentioned for either group are listed below. Numbers in parentheses represent number of times a name was mentioned.

People Suggested to Serve as Chairperson for the Campaign

Harry Costa (11)	Dean Delis	John Saparilas
George Pappas (25)	Theresa Klemes	Chris Sagris
Mark Langford (13)	Rose Marie Connell	Steve Serletis
Dennis Kekas (4)	Ted Vallas	Dr. Jim Sarant
Harry Russos	Frank Nixon	Tamara Costa
Nick Pilos (2)	Manny Aretakis	Toula Capetanos
Alex Catenis	Mary Wehbie	Chris Kamilaris
Jim Sarantos	Chris Kamilaris	George Kapetenakis
Lee Palles	Diana Sarantos	Mitch Owen
Penny Gallins (3)	Lekita Essa	
Mary Helen Winstead (2)	Sidney Langford	

People Suggested to Serve on the Capital Campaign Committee

Mrs. Pota Vallas (4)	Helen Perros (2)	Mary Wehbie (2)
Harry Kledaras	Harry Costa (5)	Mike Cederas
George Pappas (8)	Tamara Costa	Nick Pilos (2)
Mark Langford (6)	Penny Gallins (2)	Frank Nixon (2)
Sydney Langford (2)	Mitch Owen (3)	Dennis Kekas (4)

Harry Russos
Lee and Annie Palles
George Megaloudis (2)
Lekita Essa (4)
Sophia Meyers (3)
John Demos
Ernest Charles
Tim Harrison
Angie Vurnakes
Paul Dombalis
Elaine Noulis (4)
The Fotiu Family
George Kapetanakis (2)

Joyce Kekas (3)
Nick Saparilas (2)
Gus Saparilas
Jim Sarant
Artemis Sarayiotes
Roxanne Serletis
Jason Kekas
Helen Perros
Terri Fotiu
Fotis Fotiu
Kristine Scharf
Amalia Kythas
Frank Nixon

John Saparilas
Steve Serletis
Jim Sarantos (2)
Mary Helen Winstead (4)
Charles Wehbie (2)
Harry Russos
Floye Dombalis
Chuck Schmidt
Lee Palles
Betsy Higgins
Stephanie Ingle
George Lakkas

INTERNAL DEVELOPMENT ASSESSMENT



Role of the Priest

The importance of spiritual leadership cannot be overstated. Imagine the difficulty in raising funds for a major project when the priest is deeply unpopular in the parish! The priest's readiness to undertake this work, to place it high upon his priority list, to make time to work with counsel in the pursuit of major gifts will be critical to success. He must play a major, but discreet role, in the fund raising effort. When lay leaders feel the resolute determination of their priest to accomplish a task – especially one that enjoys strong community consensus – they rally to the cause. Fortunately, Fr. Paul has indicated a cheerful and ready willingness to work hard for this project.

Learning Curve

During the context of the campaign to come, many of the processes required to qualify the parish and cultivate each parishioner's interest in the project will be unfamiliar. Many new skills will be required in order to successfully cultivate and solicit the higher level of capital campaign gifts. The professional approach in the solicitation of major gifts will be a new experience for most of those involved in the fund raising. For many, it will also be emotionally and psychologically uncomfortable to personally ask a fellow parishioner for a sacrificial gift. It will be essential to enter into this effort with prayer, asking God to guide all who participate to do this new work for His glory. It also will be essential for all to be guided in the methods of professional development so that the process can be as efficient and effective as possible, with the general spiritual well being of the parish and the personal spiritual well being of each parishioner paramount.

Communication and Cultivation

One challenge will be to define and communicate with greater clarity the full description of the project, as well as any additional goals that are pursued as a part of this campaign (an endowment, for example.) As soon as these concepts can be communicated, it is advisable that time be spent describing the design and building strong consensus, to fan the flames of enthusiasm in the parish for pursuing these goals. If

any new or changed plans for construction are developed, increased two-way communication will be essential. Timely thank you letters must be sent to acknowledge the pledges that will be sought. Accurate pledge statements acknowledging pledges and gifts must be sent to confirm receipt and thank donors again. Clear and consistent communication, both formal and informal, will be important parts of cultivating interest and confidence. Once more detailed plans are ready to be shared, they could be taken out to the people in neighborhood gatherings to build the consensus of the community. This form of communication will be enhanced with further one-on-one communication with key donor prospects as the campaign builds steam.

Staffing and Information Management

A wealth of information will be generated concerning donors and prospective donors in a campaign. A major gift may require a number of cultivation visits and discussions before it is received. Recording and tracking this ongoing dialogue is essential for major gift success. The vital importance of accountability, transparency, good stewardship of the funds, the highest professional ethics, and regular reporting on progress cannot be overstated.

The capital campaign will place additional responsibilities upon the parish volunteers. These will include management of financial aspects of this campaign such as pledge statements, gift acknowledgement, and financial reports. Volunteers may need to take on additional responsibilities associated with an increased flow of information, communications, donor tracking, correspondence, meetings, minutes, etc. Parish leadership should be prepared to allocate an additional five hours per week by a technologically savvy and highly responsible secretary to support the work of the campaign.

Campaign Materials

Brochures and stationery supplies are required to complete a campaign successfully. However, this is not expected to be a major expenditure due to the priority and emphasis that will be placed on personal contact rather than expensive brochures and mailings.

SPECIFIC CAMPAIGN OPPORTUNITIES



- 1) Fr. Paul Kaplanis, the presiding priest at Holy Trinity Greek Orthodox Church, receives a strong vote of confidence from his parishioners.
- 2) The “emotional” and spiritual disposition of the parish is very positive.
- 3) The parish has received many new families and members and Planning Study respondents spoke enthusiastically about the growth in membership.
- 4) Dedicated lay leaders were cited as a strength – especially within organizations and the Parish Council.
- 5) The project is well-defined and has been carefully moved through the various vetting processes of parish life – strategic planning, campus development, architect search and interviews, broad community input and regular review by General Assemblies.
- 6) The membership describes the parish as home-like, having many converts, diverse, dedicated and welcoming.
- 7) High marks were accorded to the parish on critical campaign factors such as the financial management of the parish and general parish communications.
- 8) Many names were offered as prospective major donors; the names offered indicate undeveloped potential gifts.
- 9) \$1,385,000 to \$1,927,500 in prospective gifts to the campaign were indicated by 66 of the 102 respondents in the study.
- 10) Recently, increased stewardship is allowing the parish to allocate the proceeds from the Festival to the building campaign.
- 11) A strong majority of study participants indicated that they would make a gift to the campaign.

- 12) Most respondents felt that the parish would be open to the idea of initiating an endowment program. Forty-five families indicated openness to meeting with a member of a prospective endowment committee and six families indicated that the parish was already in their estate plans.

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 rare practice in the parish. Stewardship giving tends to be in response to what others are doing and what is required for the operating budget of the parish. If people have not yet learned how to give *sacrificially* from their disposable income, how will they ever consider giving *sacrificially* from their appreciated assets? The general non-practice of sacrificial giving means that simultaneously with a capital campaign an educational program must be conducted on the meaning and practice of Biblical stewardship. This will impede progress.
- 2) Respondents expressed deep concern regarding the state of the economy, the decline in housing values, unemployment and a precipitous drop in the equity markets; many felt that this will have a strong negative impact on the campaign.
- 3) The parish has little experience receiving major gifts or soliciting major gifts. Mentoring this process guides and inspires others. The absence of mentoring indicates an impediment to progress.
- 4) Study participants were uncertain and even pessimistic about the ability of the parish to successfully raise \$8 million in a single campaign for this project. They do believe, however, that some portion of that is attainable.
- 5) There is a perception within the parish that it lacks the concentration of very significant wealth that other similarly-sized Greek Orthodox parishes may have.
- 6) Only a modest percentage of study respondents were confident that the \$1,000,000 leadership gift and the other gifts necessary at \$500,000, \$250,000, \$100,000 or \$50,000 would be available for a successful \$8 million campaign. Skepticism and doubt are not friendly allies of a capital campaign.
- 7) A number of surveys noted some resistance to the building campaign among the more senior members of the parish. Typically, the senior generation has accumulated the wealth of a

community. Only personal conversations with these senior members will confirm or disaffirm this perception.

RECOMMENDATIONS



The recommendations presented here are drawn from the information received from those who participated in the Capital Campaign Planning Study conducted by Stewardship Advocates and an on-site assessment. Counsel has interpreted, analyzed, and evaluated the data on the basis of professional theories and methods of nonprofit development combined with 22 years of full time fund raising and institutional development experience in hundreds of Orthodox settings. Counsel 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 the interviews*, would be \$4,000,000. A stretch goal would be \$4,500,000.** Realize that goals can always be increased should strong giving warrant a higher objective. The readiness to support the building of new facilities receives strong moral support from a majority of those interviewed. It's important to remember that people invest in projects – both for profit and non profit – that appear to have a reasonable goal or promise a reasonable return on investment.
- 2) **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 top \$1,000,000 leadership gift in a suggested \$4,000,000 - \$4,500,000 campaign would have a transforming, catalytic and electrifying effect on the community.
- 3) **Undertake a major effort to more comprehensively identify those capable of major gifts, followed by a systematic process of cultivation to build ownership of the project within these prospects.** Because Holy Trinity has not needed to speak to people of significant means for significant gifts, little is known of their philanthropic interests, capabilities, motivations and affiliations.

- 4) **Craft a strong Case Statement for the project.** Once the goal of the campaign is well defined, each parishioner must be given the information they need to become an advocate for the project. 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 Holy Trinity.
- 5) **Select the Campaign Chair and other committee members very carefully. The committee may not need to be more than 8-10 people.** Remember that these people need to be the most effective leaders in the parish. *Ideally*, the Campaign Committee gives 40% of the campaign goal. The Campaign Chairpersons *ideally* 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. Allow the consultant to assist in identifying and recruiting these individuals.
- 6) **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.
- 7) **Identify the administrative person who will provide back office support to the campaign. Allocate five hours per week for administrative support.** Recording pledges and gifts accurately and efficiently will need to be a priority for this person. Accurate quarterly statements must be consistently sent out to donors. A campaign newsletter will also need to be sent out periodically. He or she will likely need to handle questions from major donors over the telephone in a polite and professional manner. This person may need to manage the scheduling of multiple meetings with prospective donors and committees. Attending capital campaign meetings, recording the proceedings and distributing minutes will be necessary as well.
- 8) **Continue to provide highly visible financial controls and communications procedures.** These competencies build confidence and encourage investment.
- 9) **Write a formal financial plan for the building program, including anticipated costs for an expanded facility and the strategies that will be employed to meet this challenge.** A number of interviewees cited the importance of this and counsel concurs.

- 10) **Use the services of a professional fund raising consultant to assist with implementing the recommendations above.** Professional nonprofit consultants assert proper priorities, bring proven expertise to bear, challenge present thinking, force deadlines and timetables and can change the way things have always been done. The development and advancement of nonprofit institutions (including churches) has become a science in the past 25 years. Building community consensus, professionally enhancing annual giving, initiating an endowment program and ultimately, raising major gifts in a capital campaign, are difficult, challenging and complicated endeavors. Most priests are working at maximum capacity managing the day-to-day needs of their parish, rendering service to parishioners and leading the community in worship. They do not have the time, the training or the expertise to also undertake these vital strategies for long-term parish development.

- 11) **Initiate an endowment program within the community, encouraging members to provide for the parish in their estate plans.** This is a sensitive matter for many people. Yet a large number of respondents in the study indicated a willingness to speak with someone within the parish about this possibility. For this program to be very successful, only a modest percentage of the parish needs to positively respond. In some of our communities, this beautiful practice has become a tradition.

EXHIBIT A - PARTICIPANTS IN THE PLANNING STUDY



Steve and Roxanne Serletis	Bill Pappas
Fr. Paul and Presbytera Evi Kaplanis	Fares Hanna
Jim and Diana Sarantos	Tom and Frances Mathes
Penny Gallins and Gene Brown	Jimmy Ellison
Elaine Fotiades	Anne Kidd
Alex and Genevieve Catenis	Vange Proimos
Leonidas Capetanos	John Georgedakis
Katina Rogers	George and Sandy Pappas
Elia Nicholas	Harry and Tamara Costa
Jim and Kally Shuart	Lou Moshakos
George Kaloyannides	Julie Powell
Louie Capetanos	Helen Perros
Harry and Cathy Russos	Joanne Gehas
Jimmy Sarant	Mr. and Mrs. Robert Hall
Chris and Irene Zahariades	Maria and George Morfogenis
Mark Langford	Eugenia Hill
Stefanie Lyford	George and Christine Lakkas
Dr. Robert Wehbie	Jessica Costa
Nick Pilos	Stella Taylor
Joyce Kekas	Mitchell and Leona Owen
Thanos Maroglou	Leon and Amalia Kythas
Bena Russos	Nadia Yovanovitch
Chris and Sophia Pappas	Helen and Bruce McCallum
Dr. Mike and Mary Karam	Bertrand R. Michaud and Patricia Z. Michaud
Chris Vlahoplus	A. J. Vurnakes
John Saparilas	Mike and Tina Forno
Lou Sedaris	C. G. Kledaras
Charles and Mary Wehbie	Janet and Christos Kamilaris

Cynthia Gallion
Lawrence J. Marangos
Janine Sagris
Evan and Maria Bundros
Elaine Noulis
Nicholas E. Stratas
Mrs. W. G. Pappas - Debbie
Sophia Myers
Lekita Essa
Harry and Linda Kledaras
Christina Brunk
Angela Georgallis
Elaine Saparilas-Prewitt
Katherine Effie Frankos
Elaine Agapion Kennedy
Beba Zevgolis
George Megaloudis
Mr. and Mrs. Alexander Sawtschenko
Paul H. Roubekas
George Fotiades
Matena and John Costakis
George and Kathleen Kapetanakis
Christine Kushner

Leslie Hatch
Penny Kyriakoulis
Joanna Tillotson
Georgette S. Wehbie
John and Christina Demos
Thano and Chrys Matthews
A. C. Triantaphyllou
Carol Poulos
Marina Kelly
Lilo Means
Jill and Brian Swartz
Helen Nixon
Emanuel Zervos
Theresa and Foti Fotiu
Sophia Mandikos
Alexia Idoura
Meg Economy
Zographia and Matthew Pusic
Jennifer E. Sullivan
Kimon and Christina Schaffer
Anonymous
Diane Filler

EXHIBIT C – STATEMENT OF NEED



Holy Trinity Greek Orthodox Church Statement of Need

I. BACKGROUND

Our Parish was founded in the 1930's, when Raleigh was a small capital of the mostly agricultural state of North Carolina. From these beginnings, Holy Trinity was able to grow and prosper by meeting the spiritual needs of its parishioners. We have always been known as a dynamic parish. When we built our current complex in the late 1970's and early 1980's we were able to do so with the use of the skills of our parishioners and minimal debt. Since then we have expanded the buildings and have acquired additional lots adjacent to our original land. Our parish has no debt and is building up its reserve for our building project.

Since the founding of our Parish, we have ministered to Orthodox communities in the Raleigh and surrounding areas, as well as the local universities and homeless.

The growth we are currently experiencing has roots in the dynamic activities of all of our organizations as well as the efforts of the priests who have served with us. We are blessed to live in a city, which is growing very quickly, with bright prospects for the future. Wake County is expected to grow 3.5% annually over the next 20 years. The Philoptochos with its emphasis on serving the poor, has been here to help all those in need. The community provides scholarships for students from the parish community. The choir is a fundamental part of the liturgy of the church and contributes to the beauty of the services. There has been a vibrant Sunday School from the beginning, which has served hundreds if not thousands of children over the years. We operate a successful pre-school, which serves both Church families and the greater community. Our youth groups provide activities for our youth with an emphasis on spiritual growth through service to the community. Finally, the AHEPA family has played an integral role in our parish from its founding through today, and continues to exert a strong positive influence in the community with its scholarship program and its strong support of the Holy Trinity community.

Our Greek Festival is the most successful ethnic festival in Raleigh, and one of the most successful Greek Festivals in the U.S. for a parish our size. We have much to be proud of and much to look forward to as we work together toward Holy Trinity's

bright future. We also participate in the Raleigh International Festival, which is an important community outreach program.

II. THE PROJECT

We own a ten acre site on Lead Mine Road in Raleigh, which gives the Church the flexibility to grow and evolve as our community grows. This existing site is split by a street, but the current building site has room for expansion. The proposed master plan, developed with the aid of Architect Christ Kamages, gives us ample room for future expansion as our parish grows, and allows us to comfortably build:

1. A new church which initially seats 550++ (A 70% increase over the current Sanctuary, which seats 325)
2. A new community hall, which seats 450, which would be adequate for larger functions
3. A new professional kitchen to serve the Hall and community
4. An office and administrative complex to meet our current and future needs
5. New classrooms, which will meet the ever increasing needs of our Sunday School, Preschool and other educational programs

III. PROJECT FUNDING

During the Master Planning Process, it was estimated that to build a new complex we would need to raise approximately \$8 million, which includes the phase 1 buildings of the sanctuary, administrative wing, and lower level of the sanctuary which includes classrooms, gathering space with small kitchen, and support offices. This also would include sanctuary chairs/benches and finishing, excluding iconography.

We are seeking to raise enough funds to build our phase 1. Our proposed methodology to raise the funds is based upon professional standards of fund raising as successfully utilized by other Orthodox Churches. This consists of three steps:

- 1) an organizational and planning phase including this Campaign Planning Study;
- 2) a core fund raising phase during which the leadership quietly seeks the major gifts that set new standards in giving, create credibility and optimism for the project, and

inspire others to give generously; and

3) a public phase in which each and every family is invited to offer their own sacrificial gift to the project.

According to the study of hundreds of successful capital campaigns, there are certain internal dynamics that ensure success. The chart below represents the level of giving that will likely be required for us to be successful.

EXHIBIT D – THE FOCUS GROUPS



Focus Group #1

June 5, 2009

Participants:

Harry and Tamara Costa

Joyce Mandikos

Jimmy Elliason

Mark and Sydney Langford

Lekita Essa

Frank Nixon

Teri and Fotis Fotiu

Elaine Noulis

Father Paul

Mitch Owen

Father Theodore

George Pappas

George and Kathy Kapetanakis

Risa Poniros

Jim and Teresa Klemes

Leon Kythas

Penny Gallins

Jeff and Mary Winstead

George Megaloudis

Focus Group Minutes:

Strengths

- The church is very welcoming with a unique mix of people.

- Our clergy is one of our strengths.
- They have high energy and are not afraid to get their hands dirty by getting involved. We are a growing parish right now.
- The Greek community, to their credit, has opened their arms to non-Greeks welcoming them in the church.
- We have a good focus upon our youth.
- We have a special bond among us. As a church community we have a good reputation in the larger Raleigh community.
- I was gone from the community for 15 years. When I came back I felt very welcomed.
- We transition well from different board members to different parish council presidents.
- The diversity in the parish council is also a strength. We preserve a peace among ourselves even in times of stress.
- My son has said that no matter what happens he always has friends at church.
- There is an interest to get closer to God; a willingness to ask questions; an interest and enthusiasm to embrace a common vision, implement programs – a spirit of offering, volunteering and working for the mission of the church.
- We have the right priest in our parish who loves everyone.

Weaknesses

- We have energized our community far beyond the facilities to accommodate the enthusiasm.
- There is a level of fear in the community regarding taking the next step.
- Our successful festival creates a financial dependency that may limit Biblical sacrificial giving.
- We have a small portion of people doing the majority of work.

- We are not as effective as we should be to reach out to those who are not quite as involved as some of the rest of us are. We need to tap into all these people.
- Integration all of the various diversities we have is a challenge.
- We may take our blessings for granted. This would be a weakness.

Key Challenges to a Successful Campaign

- Getting everyone involved.
- Bringing in people who are not very active.
- Some senior members of the community have expressed some cynicism regarding achieving this campaign.
- Some feel that we are not as frugal as we should be.
- We need to maintain ongoing, open, transparent communications with the parish so that rumors don't undermine the campaign. There is a challenge in becoming complacent about this – that everyone does know what is going on.
- We need to generate as much positive feelings as possible. These will encourage people to give.
- Getting people to take ownership of the project is a key challenge.
- We probably need to address how we would not get into the problems that our neighbor church has had.
- Do we need to have more social events that get marginal people involved? Perhaps one or two dances. We can also make money on this.
- We have a lot of young couples with young children. Some of the old ways that things were done no longer are either effective or relevant.
- We have to get over the idea that “someone else” is going to build our church. We have to do this ourselves.

Biblical Sacrificial Giving

- We have a long way to go but we have improved in our giving.
- It's an educational process. The new people and the young people have to be educated.
- We don't teach sacrificial giving to our children or to our youth. We fail to teach it as clergy.

Can we raise \$8 million in five years?

- We need to wait until the study comes back to see what would be our goal.
- We have the ability to raise this but I don't know if people will give as they will need to.
- We don't need to go outside. We need to look within ourselves for the solution to raising the money.

Endowment Program

- This will require an educational program.
- There are many ways for people to do this.
- We should identify endowment opportunities. This would encourage people to participate.
- All gifts should be acknowledged. A giving tree is a way to do this.

Advice concerning the Campaign

- Communicate and educate.
- Continue to solicit input from those who may not have offered input.
- Reach out to everyone.
- Convey the concept of sacrificial giving. We need leadership on this issue.
- We need to clarify how the church is run and why contributions are needed.
- Further the communication with our sister parish regarding some of the pros and cons of fund raising and their building project.

- Explain the project to your friends and family. Stand up to unfair or untrue criticism. Do not be afraid.
- Keep the project and communications fresh. This will go on for five years.
- Stay positive. Answer all questions.
- We don't celebrate how blessed we are as a community. We need to build confidence within the community.
- Reach out one person at a time. Get them involved.
- Set up a box out front where people can put campaign and building suggestions. Put pictures out for people to see of the new church.
- Go out and try to influence the rest of the community with the enthusiasm that we have.
- Do not lose sight of our faith. It's easy to get lost in projects.
- We need to hear each and every one of our founder/elders about this project.
- We need to remember that this project will run for several years. Let's remember to have fun along the way. This will be communicated to other people.
- We need to reach out to those people who don't come to church every Sunday.
- Push the idea that this is our legacy and that it will be something after we are all long gone.
- Different things work for different people. Keep it fresh.
- Let's remember to say how proud we are as Greeks as we experience more and more diversity within the city of Raleigh.

Focus Group #2

June 6, 2009

Participants:

Christos and Jan Kamilaris

Fr. Paul Kaplanis

Deacon Gavriilo and Rhonda Milkovich

Mike Cederas

Matena and John Costakis

Helen McCallum

Helen Perros

Emma and Arthur Paradeses

Evan Bundros

Pota Vallas

George Pappas

Focus Group Minutes:

Strengths

- Everything in our parish is good.
- We have a long history. We are growing.
- We are very diverse with many converts and different cultural groups.
- Good parish council members.
- We are very active liturgically.
- Ministries and programs have grown.
- Good emphasis has been given to youth ministry.
- We're a very active parish – the bulletin is crowded with activities and ministries.
- Every Sunday the church is full.
- Our festival is a great opportunity to bring the community together.
- It's a very inclusive environment.

- We do an outstanding job of reaching out to new people and integrating them into our community.
- Liturgical services are beautiful.
- Our priests are our number one asset. We also have a wonderful choir.
- We have a good relationship with the greater Raleigh community.
- Our people are our strength – the willingness to be interested, to come to church, to participate. When we have a guest speaker we always seem to have a great turnout. When it comes to the need to rally together we get good support.
- We have a growing commitment to serving the poor and the needy.
- If we build in the near future, we can probably receive these services at a discount.
- I was in a meeting in 1931 when we were talking about building this church. We had the same concerns about the economy, people losing their jobs, etc. Yet we raised the money in 1932 to have a church. Now we must rise up and do the same thing.
- We have no debt.

Weaknesses or Challenges

- I don't see any weaknesses.
- We don't have an adequate facility to take care of our needs.
- Money is a challenge.
- The country's economy will be a challenge to the campaign.
- We are cramped for space. We have to shuttle people in and out of rooms to accommodate the ministries, organizations and meetings.
- When we voted to build a new church we only received 63 votes to go forward. There were so few people at that General Assembly. Is this indicative of non-interest or complacency? Or is this just normal for General Assemblies?
- We have a core group that is fervently in support of this program but what of the remainder of the community?

- There are pockets of negativity within the community concerning this project. We need to continue to listen and cultivate these people – not to dismiss them.
- One of our challenges is the continued maintenance of our present facility.
- One of our challenges will also be to also minister to those who are being hurt by the current economic malaise as we proceed with a building program.
- We haven't done a good job helping people to understand what it means to be a good steward. Some people still look at stewardship as dues. It's not yet Biblical sacrificial giving.
- We have to raise a lot of money. Our people may not give as they need to give. We all need to give. We need to work for 100% participation.

How well has the community assimilated and practiced the Biblical teaching of sacrificial giving?

- We have made a lot of progress here over the years. Some are learning to give sacrificially but we have a long way to go.

Can we raise \$8 million in five years?

- Consensus of the group was that we have the capability but do not yet know if people will give generously.
- The parish council discussed at length whether or not we would hire Fr. Anthony. We came to the conclusion that we need someone with experience, training and a track record to assist us.

What advice would you give to the leadership of the project?

- Be confident that it can be done. Convey this to the community.
- The leadership has been tremendous thus far. Keep on doing what you are doing.
- Set a goal for when you are going to reach before you go to the bank.
- You can't get to \$8 million in one day. Be patient with people. They may give more as the campaign goes forward.
- Keep up the communication. I think people will come forward.
- Create a vision of how we will get there – not just where we want to be. When we launch we must be unrelenting and determined. It may take longer than five years – so what? Get it done.

- Start with an achievable goal and then add on later.
- We need the vision put out there for us.
- We need a pep talk on sacrificial giving. Those of us here in the focus group had a good opportunity to learn more about this. We need to communicate this to everyone.
- The recession will last five years. We must take this into account.
- This project calls for very deep prayer that we would be shown the way that our hearts would be softened, that we would embrace sacrificial giving.
- Get small groups together to inform them, cultivate them and then speak with them about their giving. I'm not afraid. We can do this.
- We need to communicate our personal enthusiasm drop by drop, person by person, like ripples in a pond, to other people.
- I'm very pleased with the way George has managed this process and very much hope he will continue.
- We must pray and trust in God. This must be a deepest reservoir of hope and strength.
- The question that people ask them themselves is, "Why should we build this church?" The real question we should ask ourselves is, "How will this project help us move closer to our salvation?"

EXHIBIT E - UNEDITED ADVICE



The final question in the interview was, “What other advice or counsel would you offer to the parish as regards the proposed campaign?” The responses below are offered without commentary by Stewardship Advocates. Some people had a lot to say and some had no additional comments, but many jewels of wisdom are to be discerned here. All comments have been listed.

- Remain positive in your thinking, point out the benefits of what it would do for the community - how many new people would come in.
- Remain faithful to God that this can happen. The leaders must remain strong and enthusiastic and truly believe in what we are doing.
- We feel that the project should be put on hold due to the economic situation. As we are on hold, let's build up the building fund. We need to get a million dollars into the account. Once a fund is created, then go to the people and ask them to borrow \$2-3,000 from the bank and each family give that amount.
- Have a clear idea where you are going. We seem to have this from the master plan process and project definition with the architect. We have to be strong about this - not "if" or "maybe" - but do the entire first phase - not piecemeal.
- Work hard. Work and prepare for the festival. Save money and economize on the parish budget.
- Be transparent. We haven't gotten enough information. We want to see a financial plan.
- Keep in contact with the parishioners at all times about the project. Get people involved. As long as we can keep the community from becoming factional we will be successful. As long as the project continues to build momentum, then people will begin to invest in something successful.
- Be very patient. When you deal with Greeks, you catch more flies with honey than you do with vinegar. At the same time you will have to be direct with people.
- Be very careful and cautious. People will probably want to give more than they commit to. Go slow. A lot of the families that are still with us have already built a church here. I feel it is unfair to ask them to give again.
- Concentrate on the young working people. We're from another parish and they did a tremendous restructuring there. It was mostly the young people who carried the project. With us old retirees, we don't know what's ahead. The way the market has been over the last six months, we have taken a very big hit.
- Listen carefully to people to be sure you understand what they are saying.
- Become very religious! Any type of business where you are talking about this kind of money, proceed with caution.

- Keep the community informed throughout the process. Encourage and facilitate broad participation in the process. Announce it when you get large gifts. This gives encouragement, excitement and builds optimism and momentum. Try to get all age groups involved. This gives everyone a feeling of "ownership" - even if it's very, very small gifts from children, teens and young people.
- Be patient but don't hesitate. Be inspirational.
- Don't overextend yourself to the point where it will destroy the parish. I have seen this in other parishes that I have been involved in. It tears the community apart. We have a lot of different cultural groups here. Consider how each will be approached.
- Keep the older families in the loop as much as possible. They are going to be the most vocal ones. Many still believe that expanding the church is the right way to go.
- Communicate effectively with the parish. Be direct, be fearless, and act in faith. Have open information meetings. The leadership must be aware of the present state of the economy and the crisis that some people are in. Fr. Paul recently started answering questions that people write and put in a box. Could this be done for the campaign also? Consider posting up all the minutes, and documents associated with the project on the website.
- Be flexible with your time line. Building prices are low right now but the economy is bad.
- Be clear about how much you are requesting people to give. Break it down in increments. Go personally and ask people with all due courtesy for their gift. Tie gifts specifically to items within the building program.
- Don't let up. Be persistent in a nice way. Be sure you articulate what this program will do for the future of the community.
- I would hope that there would be one donor who would make a very large gift to propel this project forward - someone who would donate a piece of property toward this project. If we don't have this the project is just a dream.
- Be careful with the architect and the builders. I know some churches that have had problems with their roofs and their buildings.
- This is a new direction. Whatever education or spiritual advice can be received from a professional, this will be important. Show the benefit of each decision to build whatever you are going to build. Establish a priority of need in the event you can't get it all. You have to show that they church can afford to build this and to maintain this. Be sensitive to people who make a commitment and then have to move.
- Talk about ministries and service. Don't be too pushy.
- Make sure we get the most important elements of the building program done first. Don't get over-extended. Don't put the parish at financial risk.
- Good communications and transparency are very important in our community. Stress prayerful giving.
- Ensure that the plan we have allows for expansion at a later date. We've done a lot to create transparency and develop new programs in the community. The more visibility we can provide to

the greater Raleigh community in terms of our service the more this will help our internal fund raising and possible external funds coming from outside the community.

- Push on. Do not be discouraged. It's a dynamic process. People's opinions change. Be well organized. Do not waste money or time. People respond positively to a well managed project.
- Be sure to focus on major gifts in the "silent phase". Raise 60-65% percent of the money quietly before you take it out to the entire community to give. This brings credibility, optimism, excitement and momentum.
- Let every leader be a humble servant, remembering the example of our Lord. Love and treat every person equally.
- Keep the whole process open but don't fall into "paralysis through analysis". Let everyone have their say but make decisions and move forcefully forward. Be realistic. Keep it simple. Watch expenditures.
- Keep your head up and don't give up. Be persistent.
- Be committed. Have a plan but still be flexible because of the wide range of personalities and interests we have in the parish. We don't want to scare any off or offend anyone.
- You are doing the right thing by conducting a study asking for everyone's input and utilizing the services of a professional.
- Have a middle ground or fall-back plan on the project if we can't raise all the money. Achieve at least part of it.
- Don't be emotional about it. Be confident. Enjoy the process. Have fun. Always stay cordial and polite.
- Communicate. Be transparent. No hidden agendas. Answer every question no matter how silly they are.
- Communicate, communicate, communicate with the parish! A good marketing campaign will increase funding. People like to feel that they are a part of something bigger than themselves.
- Do not lose sight of the main objective of the project. Continue to keep processes transparent to parishioners. Stay connected with the pulse and sentiment of the parishioners as the project progresses forward.
- Expansion of the church is a good move and necessary to handle the growth rate. However, the proposed expansion is too ambitious for the community at this time due to the economic crisis.
- Find the right people from all age groups to lead the project. I think people will be able to relate to their age group and be more trusting of this project.
- Don't forget the young people! I know the bulk of the money will come from people who are better-established monetarily, but make sure that those of us who will benefit most from this church over the next 50 years are held accountable and do what they can to contribute to their church. We tend to pass the responsibility off on our parents, but we have to step up now and prepare to be the future leaders of our church.

- Tap into the vision, how it relates to all the young couples with children. Consider the grandparents of these children who do not live here. Help them see what we are building for their grandchildren. Respect the traditional families but realize that we are a much larger community. Recognize the commitment shown by all parishioners.
- Communications will need to be run near perfection. Personal connection with parishioners who attend sparingly. They need to be engaged. Exploit all avenues for giving.
- Keep everyone informed. Try not to antagonize people. Try to reach those who only come at Easter to give a donation or two.
- Lots of prayer.
- Respect the will of the majority.
- The money could be spent to renovate the church now. Plus think of all the other causes the money could be used for. Please don't ask us to donate for this project. We feel it is unnecessary. If plans change to renovate the existing church we would donate.
- Be sensitive and be inclusive. The way this has begun has offended some people. They feel because they do not have the finances as others do. However, they have other assets to offer.
- Protect against capital campaign challenging stewardship. Explore level of borrowing/payment capability. Project/estimate income needs in new facility.
- Keep the faith. Be patient. Do not judge the size of gifts.
- Any advice I would give at this time would be premature.
- Save up the money first, see how much you can afford, then start to build within your means. Don't rely on borrowed money now to be paid back later. You shouldn't spend money you don't already have. Americans get into debt using credit cards and mortgages instead of saving first and buying it when you have the money. Request that the current church budget be cut to divert some money to the building program. There is no need for the retired priest to be paid. The choir director could volunteer his time instead of getting paid. The priest could take a pay cut. Very few of the parishioners make as much as he does. Instead of paying for maintenance at the church, ask parishioners to volunteer time and materials. Then the money that the parishioners are already squeezing out of the turnip can be used for building the larger church.
- Be confident that we can raise the money and don't be afraid to ask members for their support. During the fund raising and pledge phase of this process, I would like to suggest we post, for all members to see, the amount of pledges and by which family. I feel this creates a healthy competition and accountability for each family.
- Don't get discouraged. Keep everyone informed as to progress. If at first you don't succeed, try, try again. Try to find a way to reach the non-regulars for a substantial commitment.
- Proceed with cautious confidence and belief that God is with us.
- Proof the papers that go out to members.
- Keep the congregation informed on revenues.
- Communicated. Educate. Think positive. Don't give up. Be patient.

- The core members are very concerned with the attitude of mortgaging our church and the ability to repay the debt. Some of the parishioners don't seem to understand the difference between I want and I can't afford or pay for it. In the past our core members were self-employed entrepreneurs and achieved success through their hard work and sacrifice. The economic climate is different today. The young people of our community are wage earners and their priorities are different. The socio-economic status of our community is completely different. At one time the "old timers" lived as a community within a community and the church was the center of religious and social activity and giving was part of their being. This is different today. As a CPA, it is my opinion that no bank today will loan money to a church without some personal guarantees. Does the community have such persons and would they be willing to give a personal guarantee?
- Plan, plan, plan - get a strong committee and leadership (someone well connected!)
- Consider expanding the present church and not go forward with building a new church.
- To keep continuously in prayer before the Lord seeking His perfect will. Always asking what would Jesus have us to do? Keep in mind Psalms 12:2, "Unless the Lord builds the house, they labor in vain who build it."
- I think you should ask the parish whether they would prefer~~1. To have more than one service on Sundays (and give projected cost in addition to our current expenses) 2. To build a new church (and give projected cost of construction and all related expenses to maintain the new church)
- Be realistic - think this project through - Once you build these facilities, you will need to maintain them.
- There needs to be a good response to this survey. We can't go into this project without 70% approval and support. Be very pro-active as having church in estate plans and getting list of parishioners who are, as I am, a professional in financial planning. I would offer any input needed.
- First priority is a larger sanctuary.
- May God bless you.
- Examine the gap between desire or aspiration and the "new reality" i.e., the sea change that has occurred with financial well-being, unbridled asset or wealth growth and general security. Maybe \$6 million is the "new reality" - I'm just saying, be prepared that it may be meaningfully less.
- Stress to our folks the great pluses - that we have land, no debt, a church in which we will worship during construction and the need we have to plan for the future.
- Get a commitment from each family in the parish.
- Create transparency in the full picture - what is reserve fund? What is overall project fund goal?
- It seems that money is discussed too often within the church.
- Stress how important it is for our religion and for our families. If the Catholics can do it, so can we.
- Don't be afraid to be frank with parishioners. Sometimes we are too careful with requests for support. Need to be more direct.

- The present plan might be beyond the financial capability of our parish. Perhaps a more modest expansion plan would be more realistic in serving our needs. We certainly would support the beautification of the current entrance, enlarging and modernizing the kitchen and enlarging the fellowship hall. If the campaign survey indicates that the present ambitious expansion is doable, then of course we would support it to the best of our ability. We would love to see it happen!
- Think also of the cost of maintaining such a large expansion of the church, especially if the congregation gets smaller and is less enthusiastic years from now.
- It would be wise to collect the pledged amounts before starting building or at least a large portion to be sure the pledged amounts will be completely paid in full.
- Good luck to them!
- Don't give up!
- Be dedicated knowledgeable and honest.
- Transparency. Frequent updates. Involve sense of community. Do not overwhelm the parish.
- Promote more fund-raising and fellowship project. Approach corporations, etc., for fundraising support. Communicate all concerns to parishioners.
- Work hard to collect the money.
- Stay optimistic. We can come together and find a way.
- Please remember that the parishioners will give with their whole hearts and love for God but it might not be as great a figure that they wish they could give. Be accepting of this and don't make them belittled. We might not be able to raise the exact amount but we have to at least try to make some effort, a first step. I think that's what matters right now.
- The endowment program is a great idea and something we should have been doing for years. I've seen no information about operating budgets for the new facilities. The Parish Council needs to demonstrate far greater capability in successfully managing the assets we currently have before folks sign on for bigger buildings and more operating expenses. Paint some Sunday School rooms, get the carpets cleaned professionally once a year, fix those broken/hanging blinds by the copy room, get a contract going with an exterminator to come in and spray the cockroaches a couple of times a year. Paint the fellowship hall PLEASE, but a new bookcase or two for the library, get that Sunday School office cleaned out, put in some flowers, etc. More transparency when funds are raised for the building. I haven't heard anything about initiating a "going concern" to generate steady streams of cash, no matter how small - spaghetti dinners, selling soup or pastries to local specialty grocers, getting a booth at a weekly Farmers Market, etc.
- Parishioners may respond better to community fund raising in conjunction to major gift giving. This can involve everyone including our student population. Continue the lines of open communication. Take advantage of our parish successes, including our active community groups, fund raising efforts and festival.
- Lay out the financial options for people.
- Try and get a more professional survey - many typos and mistakes; very disconcerting. Take a close look on how money is being raised presently. Consider more fund raising activities. This

survey does not mention any except the Festival. Get the entire parish involved. Mobilize the youth. Have them raise money for this project. Pare down the scope of the project to reduce costs. It is a little too rich for this community. Have all church organizations plan fund raising events for this new facility.