



April 25, 2016

We wish to extend our thanks to all for the cooperation, support and gracious hospitality extended to Leslie Pendleton throughout the feasibility study process recently completed.

A special word of thanks goes out to Katie Pederson, Sara Weigle, Stephanie Everett, and Shea McNutt, for working on the case statement, coordinating the personal interviews and mailing the questionnaires.

During the implementation process, we found friendly, concerned, and open communication regarding the proposed campaign and project plans. A total of 125 units participated in the survey; 15 interviews were conducted, two responded to the mail questionnaires, and 108 responded to the online survey. This represents a total response rate of 50% among the members of the church community that were contacted.

This study is our distillation of the information, opinions, and ideas gathered through the survey. It represents our combined evaluation and appraisal of major factors related to the proposed campaign.

Now important decisions must be made to continue the momentum essential to the success of a campaign. The Episcopal Church Foundation welcomes the opportunity to provide further assistance.

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I. Tentative Case Statement	

## **Executive Summary**

After a period of discernment, and careful evaluation of needs, parishioners of Church of the Epiphany, Atlanta GA were surveyed through a Feasibility Study conducted by the Episcopal Church Foundation (ECF) in March 2016. The purpose of the study was to determine the willingness of the parish to support a proposed capital campaign to raise up to \$1,296,000 from members of the congregation for building renovations, parking and improvements.

All members of the parish were invited to participate in the feasibility study and 50% responded to the survey via personal interviews, led by the ECF consultant, direct mail, and electronic emailed survey.

Responses indicate 95% support among the respondents for conducting a capital campaign, although some have reservations. Study results indicated that 77% of respondents would contribute to a campaign at this time. By using the ranges of estimated gifts they indicated, and applying a formula which takes into account as yet unidentified gifts, as well as other relevant factors noted in the responses, ECF recommends that Epiphany conduct a capital campaign to raise a primary goal of \$1,006,600.

All of the comments provided by respondents are included in their entirety in the following report. The unattributed comments should be read thoroughly in order to obtain a complete understanding of all views expressed in the Study. This will prove very helpful to the leadership and members of the congregation as decisions are made about final project plans and moving forward with a campaign.

Section One of this Report provides background on ECF's Feasibility Study methodology and offers more detailed conclusions and recommendations flowing from the results of the Study.

*Section One:*

**Conclusions, Recommendations and Methodology**

## I. Introduction

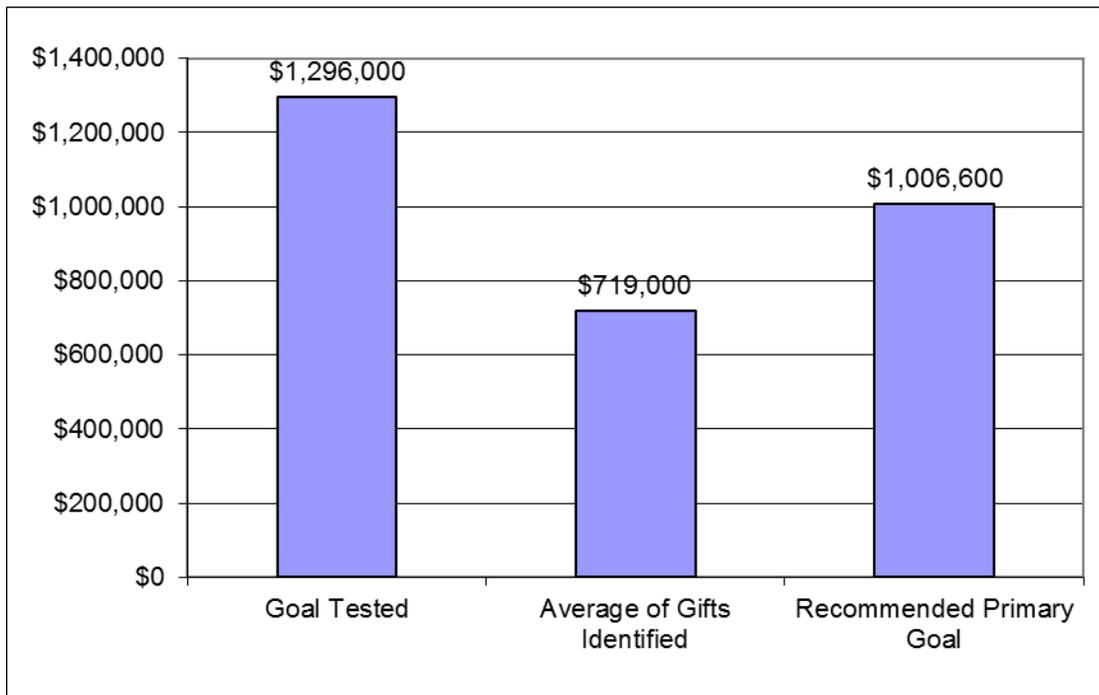
For some time the leadership of Episcopal Church of the Epiphany, Atlanta, Georgia, has been evaluating the parish's programs, facilities, and resources, and assessing the capital needs of the church. After much study and the involvement of many people, the Vestry authorized the Episcopal Church Foundation to conduct a feasibility study to explore the willingness of the congregation to support financially these identified needs.

The facts, findings, and recommendations of the resulting survey, now completed, provide a sound basis for leadership decisions with regard to the future of a fund drive. A complete description of the goals of the proposed plans may be found in the tentative case statement in the Appendix.

## II. Conclusions

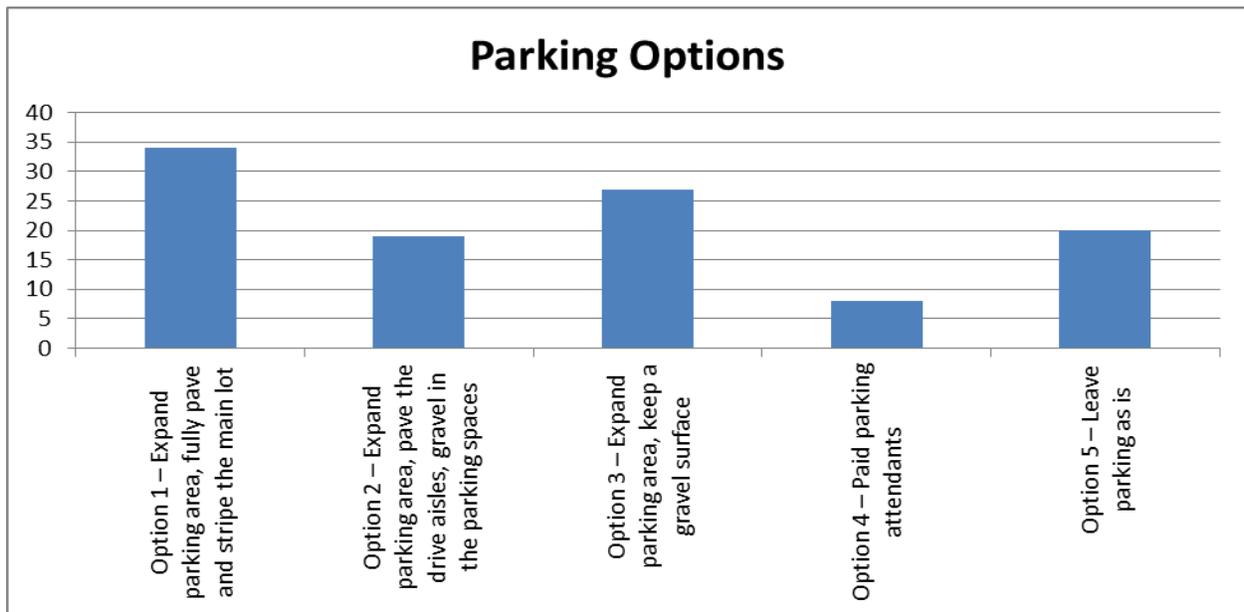
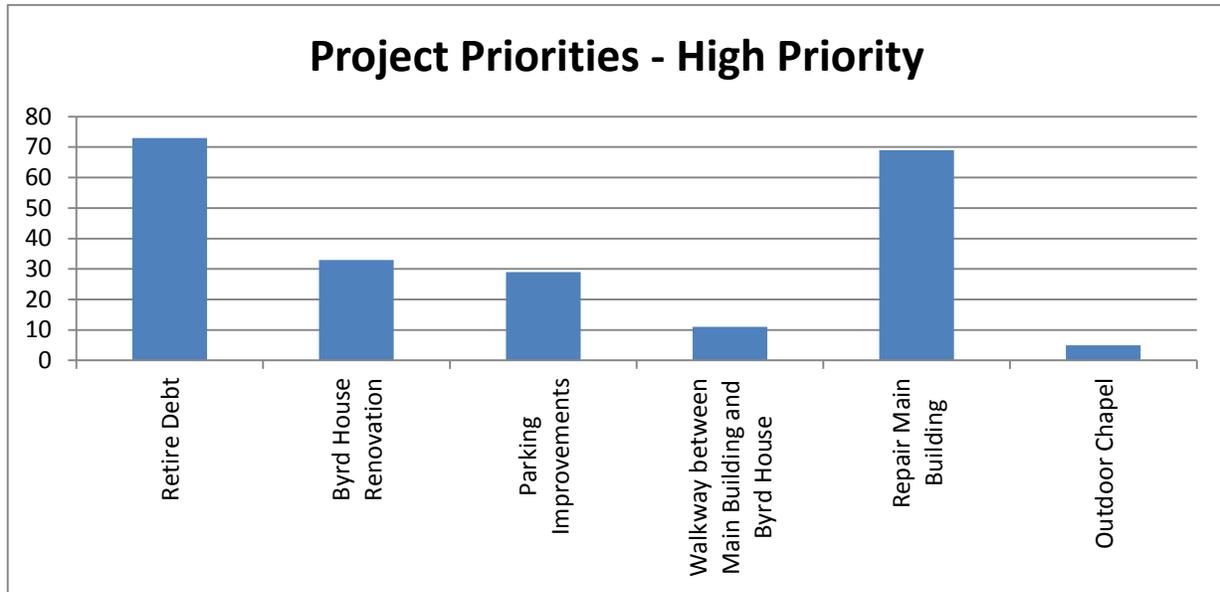
### Gift Potential

Experience tells us we can take the average between the low estimate (\$532,500) and the high estimate (\$905,500) of the pre-campaign projections revealed in the Study and multiply by a factor of 1.4 when certain percentages and comments (such as revealed in this study) are attained. Thus the average, \$719,000, when multiplied by this factor (1.4) reveals a suggested goal of \$1,006,600. This recommendation is made factoring in the reality that additional gifts, not yet identified, will be forthcoming; hence the multiple of 1.4.



## Awareness of Need

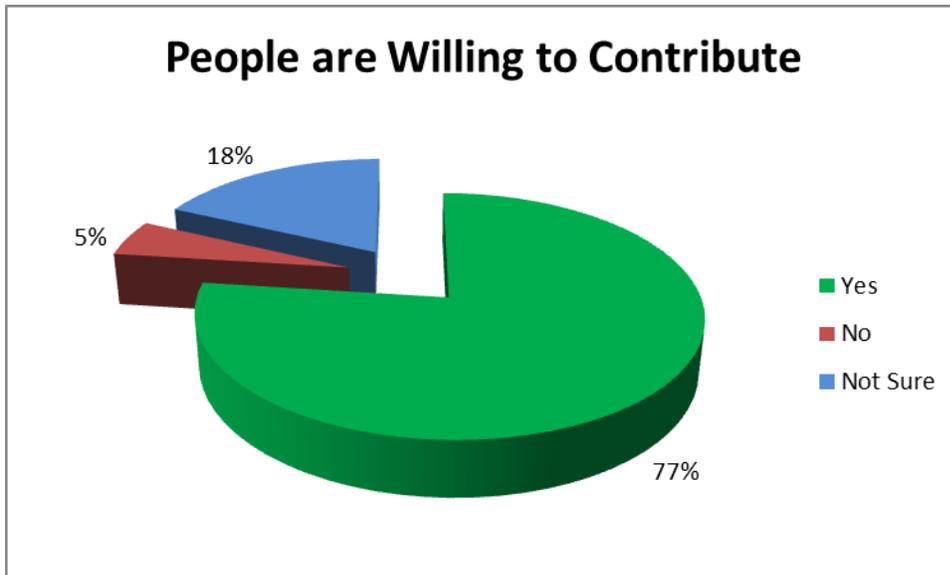
A majority of respondents (79%) were aware that Episcopal Church of the Epiphany is considering a possible campaign, and 81% were also aware of some or all of the proposed plans. Of course, not all the items received the same degree of support. Present awareness of need is a positive; however, each project should be studied and prioritized with consideration given to the degree of support and the resources available.



## Interest in and Support for a Capital Drive

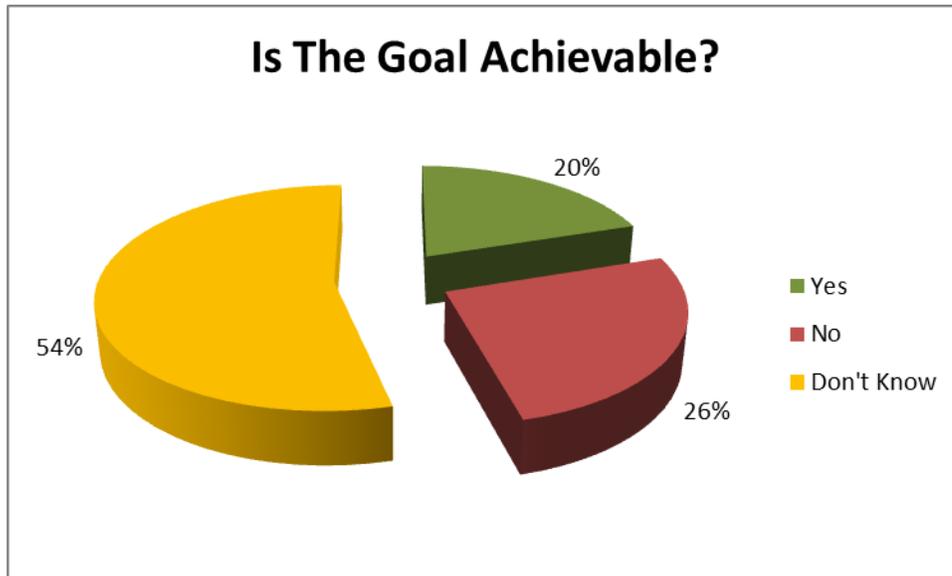
There is significant indication of support for the proposed campaign, but also signs that suggest caution. Positive signs from respondents include:

1. Ninety-five percent are in favor of the campaign, although some with reservations.
2. Only 17% are opposed to the proposed campaign timing.
3. Seventy-seven percent of respondents would give to the campaign.
4. Twenty-four percent are willing at this early stage to consider a volunteer position.

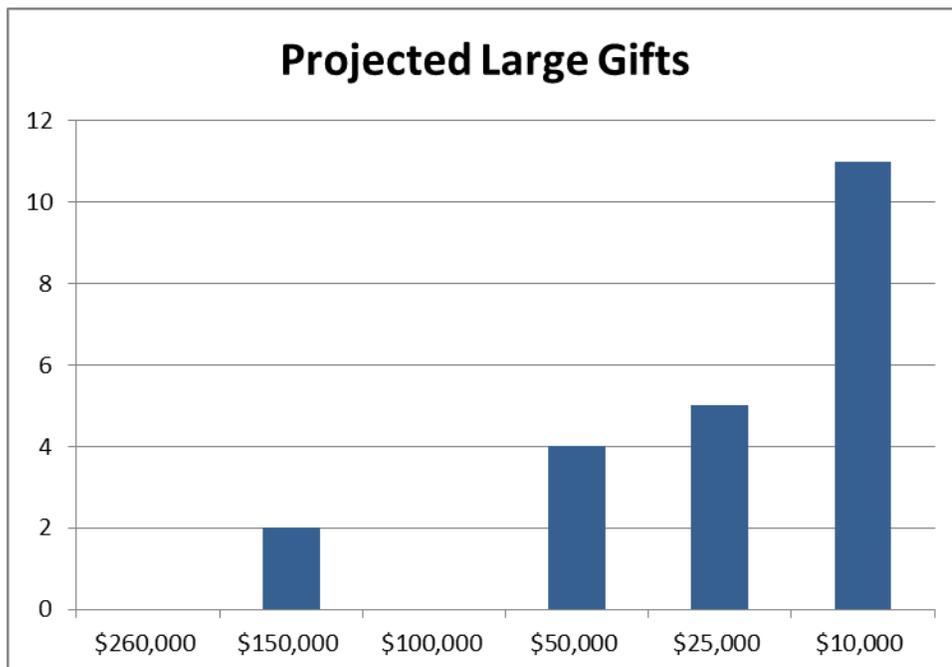


## Concerns

1. Approximately 20% of respondents feel the goal is reachable. Twenty-six percent feel it is too high. The remaining 54% had no opinion on whether this goal can be achieved. This is an indication that the proposed goal may be too high.



2. Too few larger gifts were reported at this early date to allow a goal of \$1,296,000 to be fully embraced.



## Influential Leadership

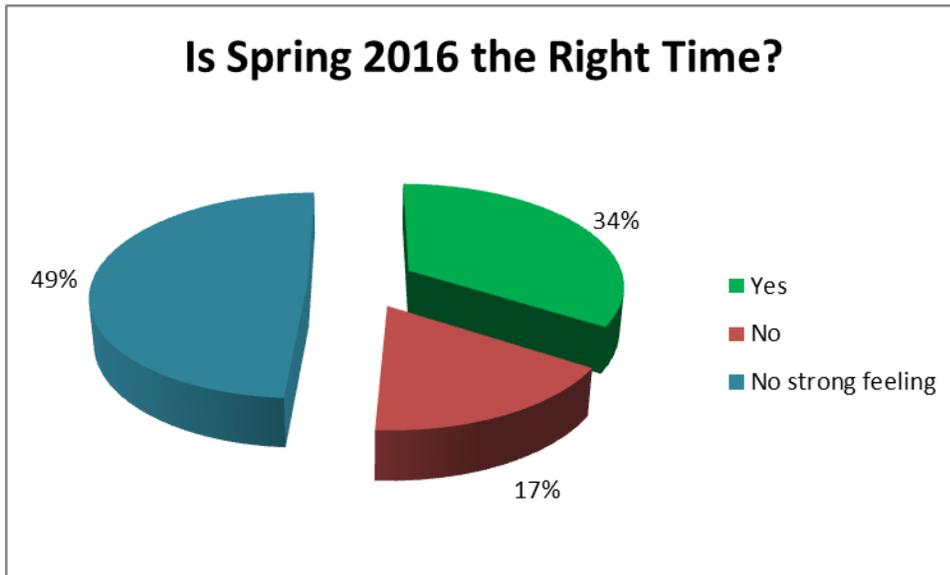
Strong leadership—both financial and volunteer—is absolutely essential for the success of any campaign. A leadership core is presently in place. It is the challenge of this leadership group to expand involvement within the parish, including other individuals who may have significant giving potential. With involvement comes commitment.

## Planned Giving

A number of people requested planned giving information, and 10 indicated the church was already in their estate plans. This is encouraging and suggests that such future gifts could be used to help build endowment or retire indebtedness.

## Campaign Timing

The respondents endorsed the proposed campaign timing. Of course, decisions on the priorities of projects must be made. It is imperative to revisit the proposed plans and make appropriate changes in the size of the effort, the proposed goal, and other sources of funding.



### **III. Recommendations**

#### **Recommendation #1**

The information revealed in this Study suggests that a capital campaign for a Primary Goal of \$1,006,600 is realistic and appropriate. This presupposes that an assertive campaign involving the entire constituency would be launched, and that the type of methodology used by the Episcopal Church Foundation would be followed.

Recognizing that immediate needs are greater than what is revealed in the Study, leadership may wish to consider \$1,006,600 as the “primary” goal and establish a larger “challenge” goal, which would encourage the congregation to stretch to longer pledges—five years rather than three years, for example.

If the “challenge” was not reached, the congregation would still experience success by achieving the “primary” objective, but hopes would be high that the challenge, at least in part, could be accomplished.

#### **Recommendation #2**

Planned giving activities should be pursued during the campaign in an effort to encourage major gifts to underwrite the future of the church. Such gifts, often deferred and received in future years, are helpful in reducing mortgages or indebtedness. The Episcopal Church Foundation is responding to individual requests for information on planned giving.

#### **Recommendation #3**

Review the Tentative Case Statement and make final decisions based on the financial feasibility revealed in the Study. Consider also the prioritization suggested by respondents.

#### **Recommendation #4**

Share as soon as possible the revised plans with the congregation and seek increased consensus. Increase significantly all publicity concerning this project.

#### **Recommendation #5**

Once the leadership has had an opportunity to review the Study recommendations and revise the proposed plan, a timetable such as the following should be considered to maximize success:

Months 1-2	Determine campaign calendar and budget. Announce goal. Begin materials development (pledge cards, brochures, letterhead, etc.). Recruit and train campaign leadership and support committee chairs. Evaluate Advance Gift prospects.
Months 2-3	Continue to train leadership. Complete materials development. Begin Advance Gift solicitation. Contact planned giving prospects, if appropriate.

Months 3-4

Prepare for and launch the Congregational Gift division. Hold kick-off event. Begin personal solicitations and monitor solicitation efforts.

Months 4-5

Finalize all calls. Set up pledge collection and acknowledgment systems. Hold Celebration Event to acknowledge conclusion of the campaign and recognize the leadership and volunteers.

**Recommendation #6**

Select professional management to guide and direct the campaign to insure efficiency and the implementation of a proven, successful fundraising methodology.

## **IV. Methodology**

### **A. The Feasibility Study**

As the parish considers a capital campaign, it should reflect on several important questions:

- ◆ What conditions are essential to a successful campaign in the church community?
- ◆ How much money realistically can be raised?
- ◆ Will the church community support a drive that fulfills the goals of the proposed plans?
- ◆ When should the campaign begin, and how long should it last?
- ◆ What volunteer leadership is available to head the campaign?

Determining the answers to these and other questions was the major purpose of the Feasibility Study. Through the Study we have researched, analyzed, and evaluated fundamental factors present, or capable of development, which might influence a capital campaign.

The study was conducted in three phases: research, personal interviews, and direct mail.

#### **Phase I**

An examination of the proposed needs, development of a “Tentative Case Statement,” determination of optimum campaign goals and timing, and review/selection of personal interview prospects were completed during sessions with the parish leadership.

#### **Phase II**

A sampling of parish members was selected for personal interviews. A total of 15 interviews were ultimately conducted by Leslie Pendleton of the Episcopal Church Foundation.

#### **Phase III**

A mail survey was sent to 20 households. Included in the mailing was a letter requesting participation in the survey, the questionnaire, the tentative case statement and a self-addressed return envelope.

An online survey was sent to 217 households. Included in the mailing was a letter requesting participation in the survey, the online questionnaire, and the tentative case statement.

## STATISTICAL NOTE:

- ◆ A total of 20 direct mail questionnaires were mailed to the parish community.
- ◆ Of those, two were returned: a mail response rate of 10%.
- ◆ A total of 217 online surveys were sent to the parish community.
- ◆ Of those, 108 were returned: an online response rate of 50%.
- ◆ Including the 15 who were interviewed, 252 units were exposed to the study. Of those, a total of 125 units or 50% participated.
- ◆ Based on experience, this response rate is an excellent representative involvement from the parish community, lending credibility to the study findings.
- ◆ Of the total that participated, 46%, attend worship services one or more time(s) per week. Another 38% attend two to three times per month.
- ◆ Regarding the financial-giving practices of those who responded, the majority, 82%, are regular contributors with a written annual pledge.
- ◆ In importance of charitable donations, Church of the Epiphany ranks as the most important charity that respondents donate to, with 54% rating it as such. Another 42% rank it in their top five charitable donations.

## **B. Elements of a Successful Campaign**

There are certain elements which must exist in connection with every successful fundraising campaign.

1. Recognition and acceptance of the “tentative needs” as expressed.
2. The case for widespread appeal.
3. Availability of strong financial leadership.
4. The capability of existing leadership to recruit additional support.
5. Past and current support levels for other church-wide capital campaigns.
6. The congregation’s awareness of the proposed plans.
7. The economic optimism of the parish community.
8. Overall response to goal attainability.
9. Indicated interest in contributing to, and projected levels of support for the proposed campaign.
10. Projected timing of the campaign.

These elements are carefully reviewed in this report. The Conclusions and Recommendations Section of this report addresses the elements of success as we consider the readiness of Episcopal Church of the Epiphany to proceed with a major capital campaign.

*NOTE: Minor editing has occurred in the comments to ensure grammatical accuracy and preserve the anonymity of the feasibility study respondents. Also, the spelling of some names could not be verified against the parish directory.*

*Section Two:*

**Composite Analysis and Summary of  
Personal and  
Direct Mail / Online Responses**

# Results from 15 Personal Interviews, 2 Direct Mail and 108 Online Responses **Total of 125 Responses**

*Note: Not all respondents answered all questions.*

**1. Prior to this survey, were you aware that the parish was considering a capital campaign?**

  97   Yes        26   No

Seventy-nine percent were aware that Episcopal Church of the Epiphany is considering a capital campaign. This is a positive indication that the church leadership has prepared the ground for a major capital campaign.

**2. Prior to this survey, were you aware of the needs as expressed in the accompanying proposed plans?**

  55   Aware        23   Not Aware        45   Aware of some of the needs

Forty-five percent of the respondents were aware of the capital needs of Episcopal Church of the Epiphany. Another 37% were aware of some of the needs. Only 18% were not aware of the needs. This is an indication that the leadership has done a fine job of communication.

**3. Are there additional needs that seem important to you which are not covered by the proposed plans?**

*Comments:*

I think a portion of the money raised for the capital campaign (10%) should go to outreach. (2)

Outreach support. (2)

Check on the state of the organ. Possibly an organ fund? (2)

Full-time youth staff.

Dedicated teen/youth person for Jr. high and high school.

Something dedicated to pastoral needs - services or a staff person.

Move the playground to behind the Byrd House. We need better curb appeal and additional signage.

Regular maintenance fund.

New seating.

On-going funding for supporting community service actions made by Epiphany, although this could also come from annual budgets.

Additional services during the week (in the evening) to accommodate those who have families and work. Which likely means more clergy.

The church provides food frequently, and to a large number of people. The stove burners and oven are hard to light and inconsistent in their function. This facility does not provide an effective set of resources for the cooking that we do for our own events, for Peachtree Pine, or for Emmaus House.

Landscaping.

Add a real elevator to the second floor, audit entire facility for wheelchair accessibility and wheelchair friendliness.

The plans do not provide for the need for a greatly increased number of parking spots.

#### **Interest in and Support for a Capital Drive**

#### **4. Generally speaking, do you favor the parish conducting a capital campaign as outlined in the proposed plans?**

70 Yes

6 No

34 Yes, but with some concerns

More than half, 64%, are in favor of the campaign, with another 31% in favor with some concerns. Only 5% are opposed to the campaign. This is a sign that the church community is willing to support a campaign.

#### *Comments:*

Not really sure what a capital campaign is.

There should be no pressure on individuals to participate (give). How will it be decided which projects to pursue first? I may only be willing to give for specific projects.

I am quite concerned about the parking renovations. Improvements to the church and Byrd House should also focus more on energy efficiency, storm water collection and reuse, and similar concerns. I think the outdoor chapel is a terrific idea and should include a labyrinth or other meditation device, integrated into the woods behind the Byrd House.

Have needs been established to guide the renovations at Byrd house? Given the number of meals provided in the parish, is there consideration of expansion of the kitchen?

There are only some things I would support at this time.

I wish the campaign weren't so insular; the Byrd House and retiring debt, are on some level, missional in that they enable us to devote more of the operating budget to work in the community (in the case of debt retirement) and to have space to do some of that work (in the case of the Byrd House), but the missional aspects seem largely secondary. I think those things are important and valuable for our congregation, but I wish our focus were a little less insular.

\$192,000 seems like a large amount of money for the walkway between the main building and the Byrd House.

No outreach component.

Will the expenses of the Byrd House and walkway really sustain the community well? Can we make it more self-sustaining?

Fixing the main building is top priority.

I am not familiar with what exactly the money is going to and what amount.

Byrd House is an albatross.

Are those who have come to Epiphany recently willing to make a big commitment?

The plans do not provide for the need for a greatly increased number of parking spots.

I would like the debt paid down, but do not think the savings should go to additional clergy.

Too much money.

Paved parking seems the least important item in enhancing worship space and the ability of the parish to expand outreach to the community.

**5. Please indicate the level of priority you would attach to each of the projects outlined in the proposed plans by checking the appropriate line under each heading. At present, they are listed in no particular order.**

*\*Select only one option per line and feel free to make comments (use an extra sheet if necessary).*

	PRIORITY				
	High	Medium	Low	Opposed	Lack Information
a. Retire Debt	<u>73</u>	<u>27</u>	<u>5</u>	<u>3</u>	<u>2</u>
b. Byrd House Renovation	<u>33</u>	<u>51</u>	<u>17</u>	<u>4</u>	<u>3</u>
c. Parking Improvements (see question #6 for options)	<u>29</u>	<u>40</u>	<u>29</u>	<u>8</u>	<u>3</u>
d. Walkway between the Main Building and the Byrd House	<u>11</u>	<u>39</u>	<u>46</u>	<u>9</u>	<u>0</u>
e. Repair Main Building	<u>69</u>	<u>31</u>	<u>4</u>	<u>0</u>	<u>4</u>
f. Outdoor Chapel	<u>5</u>	<u>32</u>	<u>51</u>	<u>15</u>	<u>7</u>

*Comments:*

I agree that there should be a clear pathway from the church to the Byrd House, but I believe a different design would be less expensive and have less adverse impact on other parish functions. I hate the thought of converting the existing oratory into a vestibule, thereby losing that function altogether. I also dislike the thought of eliminating parking spaces for a walkway. There is an existing concrete path running from courtyard past the sacristy, connecting with a path from the baptistry, and feeding into the south end of the paved parking lot. If this path could be continued on the other side of the parking lot, it could be constructed so as to lead to the back of the Byrd House and people could enter via the new ramp and deck included in the proposed renovations. If there was a wish to include a covered area on the deck in case of rain, that would be less expensive than the two 10-foot canopy roofs proposed.

Maybe we can do the projects and pay off some of the debt. If we pay off the debt I would like to know where the \$52,000 annual is going.

The debt had always been planned for during the last campaign. There were no unexpected expenses.

Retiring the debt should come after everything else is funded. If we take the debt out of the equation we can raise what we need for these exciting projects.

D. We need a walkway but I don't like the plans.

The value of the Byrd house is the land. Not worth fixing it; it's a dump. Build something new.

We are not ready for growth and should wait until we have a better understanding of what we are and where we want to go.

Item B - Byrd house is a valuable option if we anticipate significant programming need for the facilities. We need to look carefully at the expected uses for a remodeled facility to be sure there is sufficient need, if so I would move my ranking to HIGH.

Seems like we are retiring one debt for another debt.

Retiring the debt is utterly crucial. Then, maintaining the existing buildings is a must - we cannot let them fall into disrepair. An outdoor chapel would be lovely, but is not necessary. I think a walkway would be nice but \$192,000...really??? That could be done in stages.

Would it not be better to raze the Byrd House and build a facility that meets our needs? We could do a lot with \$250,000.

Debt reduction first and foremost; our debt drains \$50,000 + per year from our programs.

Eventually if we tear down the Byrd house to make room for a newer, more updated and usable building, I hesitate to spend money on that existing structure now...particularly when we are currently in debt and have such existing building and parking lot issues.

The outdoor chapel is a new one for me.

Surely there is a better, less expensive option for making the parking lot safer.

The outdoor chapel is actually a high priority for me, but I don't see any plans for mitigating the noise from the street. If you have ever sat in the meditation circle in the woods, you will know that that is a VERY loud area. Actually holding a spoken or silent service would be nearly impossible without sound mitigation.

I don't think an outdoor chapel should be part of this campaign.

Our very first priority should be performing all necessary maintenance and developing a regular schedule for maintenance. Maintenance should include more hours for the sexton.

Some or all of the elements are important, but the scale of each of them is unnecessarily grand.

Retiring all the debt is unrealistic and may be a bad idea. I do not know what should be done about the parking but you will not get support for any of the options.

An outdoor chapel seems like a good idea. However, the Meditation Garden and the outside area developed by an Eagle Scout have not seen much use - if any at all. I believe the other options are much more important to the church as a whole. In fact, the outdoor chapel seems to be a priority to a small group of Epiphanyites.

Let's spend our money in worship spaces - not the parking lot

B & D must go together.

*In determining which parts of the proposed case are most attractive to respondents, the following system is used:*

*High Priority = 3 points; Medium Priority = 2 points; Low Priority = 1 point;  
Opposed to Project = -1 point; Lack Information = 0 points*

*The most popular receives the highest number of points.*

**a. Retire Debt**

  219   High Priority              54   Medium Priority               5   Low Priority  
   0   Lack Information              -3   Opposed to Project

Total Points: **275**

**b. Byrd House Renovation**

   99   High Priority             102   Medium Priority               17   Low Priority  
   0   Lack Information              -4   Opposed to Project

Total Points: **214**

**c. Parking Improvements**

87 High Priority      80 Medium Priority      29 Low Priority

0 Lack Information      -8 Opposed to Project

Total Points: **188**

**d. Walkway between the Main Building and the Byrd House**

33 High Priority      78 Medium Priority      46 Low Priority

0 Lack Information      -9 Opposed to Project

Total Points: **148**

**e. Repair Main Building**

207 High Priority      62 Medium Priority      4 Low Priority

0 Lack Information      0 Opposed to Project

Total Points: **276**

**f. Outdoor Chapel**

15 High Priority      64 Medium Priority      51 Low Priority

0 Lack Information      -15 Opposed to Project

Total Points: **115**

**RANKING BY POINTS:**

Repair Main Building	276
Retire Debt	275
Byrd House Renovation	214
Parking Improvements	188
Walkway between Main Building and the Byrd House	148
Outdoor Chapel	115

These rankings do not dictate those projects the church should embrace in the final case statement, but they are a strong indication of what communication and marketing must occur if leadership does elect to support projects that have a lower acceptance rating.

**6. Which of the options for parking would you prefer? (choose one)**

34 Option 1 – Expand parking area, fully pave and stripe the main lot

19 Option 2 – Expand parking area, pave the drive aisles, gravel in the parking spaces

27 Option 3 – Expand parking area, keep a gravel surface

8 Option 4 – Paid parking attendants

20 Option 5 – Leave parking as is

*Comments:*

I would point out that Option 4 is not a capital expenditure, but would be an ongoing expense in our regular budget. It should be listed as "\$34,500 for the first three years."

We're concerned that the numbers for these options seem much different than the historical numbers. Underground storm water retention was much more 10 years ago.

We bought the Byrd house to expand parking and these options do not give us more parking. How about an Exit Only onto Ponce from Byrd House – entering from the church side?

Option 1, but with further expansion and more spots.

I'd like to try having people help people to park before we do a paved lot. The ramps do not meet ADA standards.

Option 2 - Needs to be organized and striped.

I understand that our current parking lot needs considerable improvement. But paying \$250,000 for a net increase of 6-10 spots does not seem like a wise investment. What about the option of extending our parking lot over into the back yard of the Byrd House? This has been mentioned a number of times, but seems to have been left out of these plans. Why? I think that we should be allowed to vote on this option as a parish.

Can't we get some volunteers to help with parking?

Option 1 is optimum; option 2 to accomplish soon.

Based on expansion proposal as I understand it, we would get very few additional parking spaces for the cost.

The layout for a paved lot shows 44 spaces planned. Do we know how many cars typically fit currently?

If we are going to do it, we need to do it right. (2)

I favor this only if it doesn't require major increase of handicapped parking that exceeds our needs. We should be sure we won't end up with DeKalb County actually lessening our parking space because of regulations.

There is more designated room for parking on the street now. Parking space is NOT a priority when there is debt. Ask for volunteers for parking duties on the big holidays.

Option 2 or 3 depending on costs.

How do any of these solve our limited parking space issue?

Can the paved spaces on side of building be designated for those with mobility impairments? I'd park farther on any day so someone with mobility impairment could park closer.

Parking isn't that bad. Valet is tedious, and the gravel lot isn't an eye sore.

Do not pave parking lot - leave permeable - with budgeted gravel replenishment/next best option - leave parking as is.

Difficult to assess but I trust you to analyze the situation and go with the most optimal bang for the buck.

Binders are available that allow permeable stable surface.

None of the above. We should have the option to vote on considerably increasing the number of parking spaces by extending our parking lot into the backyard of the Byrd House.

My first thought was option 5. I say option 4 but I do not see it working very well.

Option 3 is second choice.

The parking is used for 3.5 hours a week. Turning the parking into impervious surface will adversely affect storm water runoff for 168 hours a week. That's a 15:1 ratio. For a church that seeks to promote a sustainable footprint, this seems counter-productive. Permeable pavement is possible, but is both more expensive and needs to be maintained (especially since tree cover accelerates degradation of permeability). As for the need to expand parking, I don't see the need (there are few days when parking overflows onto the street, and in any case, it is a better use of land to use the street for those Sundays). I also do not see any design for the expanded parking lot, and unless the width of the lot is going to be expanded by 20', do not see how you can add 50 spots. A 20' expansion would greatly cut into the forest cover. The concern about orderly parking could be accomplished simply by integrating granite or concrete parking "lines" into the gravel (e.g., 10" wide stripes that are at the same level as the gravel but are made of concrete or granite, to mark the sides of the parking spaces), although my sense is that this will yield only 5 or so spaces more and may not actually help at all since it seems to me that people usually park pretty efficiently).

**7. In your opinion, what major positive factors does the parish have in its favor for the proposed campaign?**

*Comments:*

Growth. (10)

Thriving with young people/families. (13)

The clergy/leadership. (6)

The staff. (5)

The parish's main strength is the diversity of ages of members. (2)

A very involved, spirited, dynamic congregation. (5)

We haven't had a campaign since early 2000's. (3)

We have enough people with the ability/affluence to give. (4)

Commitment to community. (7)

There is a lot of excitement around doing something. (2)

Energy around new programs. (2)

Open and welcoming to everyone. (2)

The people are great. (2)

We are a church about being family to one another; we are in it together and people will support what the family wants. (2)

The church feels healthy.

ECF has led a good process and organization.

The obvious need.

Strength of people's connectedness to Epiphany.

It's doable.

If we retire the debt it will help the annual budget.

We have talked about the parking lot forever so people know it is a concern.

There is a core who understand capital campaigns and have done them in the past.

Friendly and warm (as it has been for a long time).

Lots of children.

Intergenerational.

Continuity between the buildings and the parking need to be addressed.

Good will. Love of history. Love of God. Leap of faith.

Epiphany has strong leadership and an active congregation who want the best for the parish.

Inclusive parish decisions.

The very deliberate process itself, which seems designed to move forward only with broad support among parishioners.

Many long-time invested parishioners.

Cohesive staff and vestry who are committed to the campaign.

Fantastic community of people.

Great location.

The parish has the desire to make our place better, plus the scope includes several discrete projects which gives more flexibility in selection and funding.

Possible increase in membership and attendance at various "extracurricular" events.

Better use of Byrd House. Better parking with lines.

Modest needs for the parish facilities (relatively controlled cost), and the staff appears to be supportive.

The ability of members to contribute necessary funds. Some perception of growth in participation in programs.

Increased accessibility for all parishioners to enjoy the grounds. Beautification of the land will provide a more welcoming street appeal.

With the Byrd House, Epiphany has the opportunity to serve the community and the parish.

That we require more space is an exciting prospect for the parish.

The outdoor chapel will attract more members.

Everything should point to our mission for outreach and our sustaining community.

That people have passion around each issue. And according to my cottage meeting, people want that debt paid off.

The campaign is good financially in that we could retire the debt and then have that money to fund other things; and it's good in that we take care of, renovate, refresh what we do have.

Vision of Epiphany as an institution committed to long-term impact, not just on Sundays for an hour or two.

Protecting resources while improving accessibility and safety.

Improved community outreach and engagement. Increased capacity for hosting events. Improved accessibility and general aesthetic update.

Enhancing the infrastructure can allow even more impact to God's children outside of the church. Improvements on our property can attract residential neighbors to come worship as well.

Debt always prevents imagining the next levels of improvements.

## 8. What problems, if any, do you foresee for this project?

### *Comments:*

Raising the money. (5)

Such a diversity of opinions could make consensus and prioritizing a problem. (6)

We don't have the big obvious deep pockets. (2)

Parking disagreement. (2)

Lack of consensus around use of Byrd House. (2)

Lack of funds. (3)

It is very expensive! (2)

We do have many new families, but can they afford to donate in substantial ways? Many of our older, richer folks have passed on. (2)

There are many demands on the family budget, including competing charities and good causes. (5)

Low participation. (2)

The possibility of losing parishioners. (2)

Issues with parking during construction phase. May need to hire company to drive golf carts to get elderly members to the church. (2)

Our eyes are always bigger than our stomachs. We overreached last time and now these many years later, our debt service robs our programs of vitality. (2)

Contributions to the capital campaign are above and beyond annual stewardship pledges. That means donating to a capital campaign, while important, may be seen as a "nice to have" versus a "have to have". That may result in less funds than are necessary to meet goals. (2)

The lead up to this has been disjointed. We've started and stopped and communication has been spotty which has caused misinformation.

Elders having a harder time visioning the future.

Biting off more than we can chew.

Doing everything at once.

Inertia/opposition to change.

If we are happy at the size we are we do not need to have a campaign to grow.

The usual special interests. How do we set priorities?

People will feel we should not spend money on ourselves.

Typical situation wherein the debt continues. Too much on the wish list.

Pledges not being met.

Familiarity and fondness for the status quo.

Resistance to optional expenses.

Timing.

The funding is mostly oriented toward physical improvements, which ultimately are not the reason for the church community to exist.

Too many folks giving input and not being able to get the projects off the ground. You need to definitely reel that process in for a construction project.

No big-ticket items that would possibly be an energizer for fundraising.

I don't see enthusiasm for it.

Permits - if we use Byrd House for church purposes we have to spend a lot of money to renovate.

An overall plan which argues for a coherent whole into which projects fit. A correspondence of this plan to the measured projections for growth of the church membership. Without knowing what percentage of church member participation is the norm for churches of this size, as a part of members registered, it is hard to know likelihood that these actions might draw people into more active church life. Renovation of Byrd House might provide space for more focused attention at more times of the week to adult formation than 10:00 adult classes.

Not all of these proposed projects are necessary. I think the question we need to be asking is - what do we really need? The walkway and the chapel would be lovely and wonderful, but do we NEED them? I would say, "No". We NEED to retire the debt in order to build our programs. We NEED to take care of our physical plant. Everything else is gravy! Take care of our liability and our assets first!

An issue would be that the vestry decides to take out a loan to stretch beyond the capital campaign and take on debt again to fulfill the needs.

Allow the Parish to vote on expanding the parking lot into the Byrd House back yard. I do not believe that people will support the Capital Campaign if they feel their ideas are not represented. What is the harm in allowing a vote on this option?

Possibly too much dependence on the older members with some discretionary income to fund the campaign.

Not getting some of the necessary high lead donations.

Construction hindrances and nuisances.

Getting consensus on retiring debt which should be the number one priority.

**9. What added ideas or suggestions do you have which might be helpful to the leadership in making this important decision to consider moving forward with the campaign?**

*Comments:*

Keep us updated on the details of the campaign- Debt most important? Byrd House?

Cast a wide net when you get volunteers involved; include all groups.

Communicate the need and get it in front of people. Get the solutions in front of people. Show pictures of what could be.

Lay out the process and keep transparency. Listen to what the parish wants to do.

Consistent information and communication. Fuller involvement from Epiphany members. People need to feel involved.

Consider matching or challenge gifts.

Keep communications open and stay transparent. Continually update fact sheet online.

This needs to be communicated well (videos of members talking about why they support it); visible goal and progress communicated in a visual way. Intentional, positive communication.

Consider an outreach element to make it appealing to some.

Keep things framed on what this means for us in the future.

In order to have a vision for the program church that we are, we need some consistent structure around our current programs. Growing will require a cultural growth. We love the spontaneity, but we are too large not to be organized.

Keep listening and allow time for people to weigh in. Don't try to override or shut down opinions.

Keep on with the process. These are good options to consider. People will have a lot to say but that doesn't mean they won't support it.

A \$1 million + campaign is significant but I believe the size and vibrancy of our parish makes it very doable. It would be helpful as a point of reference to know the size of our last capital campaign, the number of gifts made, total commitment (and average gift), along with the size of the parish at that time versus now.

Need to look outward as well.

Scale it down. I think that would be the best way to get it done unless church members with significant financial resources help to jump start the campaign.

Take a hard look at our budget to see if there are places where expenses could be cut; apply those savings to debt reduction.

The plan for bringing people together to express their opinions will be a factor in moving forward.

Place emphasis on being part of our diocese. Use Camp Mikell. Improvements are underway there as we speak.

Making sure the project is completed in a timely manner.

Complete feasibility study, determine how much can be raised, and then ask parish to prioritize based on funding anticipated to be received.

For those of us who weren't here in 2004, how did the parish manage the 2004 expansion? How much did it cost and how was it paid for? It would be useful just for comparison sake to see how this capital campaign compares in scope (and risk) to prior ones.

Forming committees for the overall project and then for each individual project with parishioners. This will allow folks to feel included but not have it get out of hand. I'm sure there are folks in the parish who have expertise in the actual production part and can be of significant help.

The stove in the kitchen is hard to light and requires lying on the floor. We cook a great deal in the kitchen. It would be nice to have a stove that works well. Very few people want to take responsibility of lighting it.

Clarify outcomes if debt retirement is conducted; how will this benefit/affect other church programming?

Byrd House and debt seem burdensome. What if we sold Byrd House, paid off debt, and repaired existing building plus added parking? Don't see this as an era for expansion of church buildings. Would prefer to take the church out of the property more.

I would recommend an ADA concrete pathway with rails from the side parking area to the back of the Byrd House. This would allow for accessibility to the back of the Byrd House lot without having to go around or through the front of the house.

Maybe ask..."What can we continue to live without?"

There will be more buy-in (at least from me, but I think I'm not alone) if we focus on how these improvements can help us be Christ's hands and feet for our brothers and sisters, even (and perhaps especially) those outside our parish.

Do the parking lot in the summer.

Revisit Byrd House remodeling vis a vis a new building. Present some outreach considerations.

Clearly identify and articulate core and stretch objectives. For example, building and facility maintenance is a worthy, important, and legitimate reason for capital raising. The development of the additional property would seem to come second, with the parking lot a distant third. Try to strike a difficult but important balance between realistic and aspirational fundraising goals in line with the income and affluence of the congregation. Try to remain as apolitical as possible in the current toxic presidential campaign environment.

Review support for outdoor chapel.

I hope we've got a few super donors in our pocket. Those of us on fixed incomes probably can't come up with too much.

Spend more time in prayer. Keep up the good work.

Check out the results of this survey first.

I appreciate the deliberative approach and gentle prodding to reflect.

I think the overall list of proposed capital ideas is complete. However, I prefer to see all other items addressed BEFORE we spend money on the Byrd house or the connector to it. I like having the Byrd house, but unless we feel confident it will still be in use for the next five years or so, I would not spend large amounts of money on it (i.e., basic repair and maintenance only). Let's just be careful not to spend close to half a million on the Byrd house and connector just to turn around and tear it down in 3-5 years in order to build a better building for our needs.

Painting and cleaning of residential areas is within abilities of non-professional persons with easily available equipment. Develop plans for volunteer solution for these types of sub projects.

I think that we should be allowed to vote on parking options as a parish.

I strongly suggest dropping the outdoor chapel idea and any reference to more staff in the promotional materials and discussions.

I think all of our decisions should reflect a principle of accessibility and welcome.

I've attended churches where the "annual ask" was muddled with the "campaign ask" and this created great confusion and angst among parishioners. Keep it clear that you want people to continue giving their annual gifts and that a campaign gift will be a "dig deeper" level of support. Encourage stock gifts and gifts from individual retirement accounts as these may be even more advantageous to donors from a tax perspective than the "checkbook gift".

Get renderings of the final project with color coded areas to represent the various parts of the project.

### Leadership

#### **10. If asked, would you be willing to work on a committee in support of the proposed capital campaign?**

26 Yes      28 No      54 Not sure at this time

Twenty-four percent would be willing at this early date to volunteer. Another 50% are not sure at this time and may be persuaded to participate as the campaign plans are formulated. This is a relatively good response at this stage in the process. It appears likely that an adequate number of workers would be attracted to the campaign.

**Campaign Timing**

**11. Do you know of other current or projected capital campaigns in the community that might have an impact on the success of this proposed effort?**

Emmaus House - 2017

One could reference the Decatur School's bond but that is of such a completely different nature I think it not germane. There is also the Woodland's capital campaign (though I think it has been successful achieved from a pledge perspective but it would be an existing, ongoing overlap with the three year campaign payment timeline). Finally, there are, I believe, ongoing campaigns for the Linear Park.

Not unless Ponce gets widened, which could possibly impact the planned Byrd house connector.

Georgia State University

Huge growth of City Schools of Decatur without adequate funding.

**12. Does a proposed solicitation period for pledges in the spring of 2016 seem appropriate to you?**

37 Yes    19 No    53 No strong feeling

Thirty-four percent are in favor of the proposed timing. Forty-nine percent expressed no strong feeling one way or another. The remaining 17% were opposed to the campaign timing. This is an endorsement that a campaign could proceed as scheduled.

**Gift Potential**

**13. How would you describe the present economic climate in your community?**

8 Excellent    78 Good    20 Fair    0 Poor

Seventy-four percent of the respondents to this question believe the present local economy is good, 19% consider it fair. Seven percent believe it to be excellent, and no respondents rated it as poor.

**14. Is the present economic climate improving, remaining the same, or declining?**

29 Improving    61 Remaining the Same    16 Declining

Indications are that the local economy is remaining the same, with 58% rating it as such. Another 27% believe it is improving, and 15% believe it is declining. These responses express economic optimism. When people feel the economy is good, they are more apt to make gifts.

**15. To attain the proposed goal, substantial leadership gifts would be required. Do you know of any individuals, foundations, or other sources that might support these proposed plans? If you have a personal tie to any of these, would you be willing to make an introduction to them of the campaign leadership? If so, please indicate and we will be in touch once the campaign goes forward. (Please include mailing address, phone number, and email address if possible.)**

UTO grant

Druid Hills

Green grants (if some of the renovations qualify).

It's worth checking out family foundations. (Emory Foundation, Glenn family who built Glenn Chapel, Woodruff, Coke, Georgia Power)

Do we have any grant writers in the parish?

**16. Do you think a goal of \$1,296,000 (as outlined in the proposed plans) can be raised in gifts and pledges? (A variety of options exist for the parking portion of our project. We are assuming the most intensive option for purposes of initial budgeting.)**

  21   Yes        27   No        57   Don't Know

Only 20% believe the goal can be attained, while another 54% have no opinion if it can be reached. Another 26% do not believe the goal can be attained. Normally, we like to see at least a majority believing the goal is feasible. Generally when less than half are confident about the projected goal, the proposed goal is usually too ambitious.

*If no, how much do you think can be raised?*

\$500,000

\$600,000 (2)

\$700,000 (2)

\$750,000 (3)

\$848,500

\$1 million (3)

Half the amount. (3)

Twice the annual budget.

**17. If convinced of the need, would you be willing to contribute to this proposed campaign?  
(All gifts, regardless of size, are needed and are important to the success of the  
proposed campaign.)**

83 Yes      6 No      19 Not sure at this time

Seventy-seven percent would be willing at this early date to contribute to the campaign, while another 18% expressed that they are not sure at this time. Only 5% indicated a negative response. This is positive and an indication that a campaign can proceed.

**18. If "yes," please estimate your possible total range of giving. Gifts can be paid over a  
three-year period. *This is not a pledge or in any way binding.***

<u>9</u> \$500 or less	<u>14</u> \$500 to \$1,000
<u>19</u> \$1,000 to \$3,000	<u>19</u> \$3,000 to \$5,000
<u>11</u> \$5,000 to \$10,000	<u>5</u> \$10,000 to \$25,000
<u>4</u> \$25,000 to \$50,000	<u>0</u> \$50,000 to \$100,000
<u>2</u> \$100,000 to \$150,000	<u>0</u> \$150,000 to \$260,000
<u>0</u> \$260,000 and above	

**Typical Gifts Essential to the Success  
of a \$1,296,000 Capital Campaign**

<b>Size of Gift</b>	<b># Needed</b>	<b>Gifts Indicated in Study*</b>
\$260,000	1	0
\$150,000	1	2
\$100,000	1	0
\$50,000	3	4
\$25,000	5	5
\$10,000	20	11
\$5,000	30	19
\$3,000	35	19
\$1,000	40	14
\$500 and below	Many	9

\*Using the high range estimate

Respondents projected donations ranging from a low of approximately \$532,500 to a high of \$905,500. While not indicated in the chart above, not all gift amounts were given within a range as presented. Some were given as singular amounts, e.g., \$5,000, instead of \$3,000 to \$5,000. The high and low estimates have been adjusted accordingly. These early estimates fall short of supporting \$1,296,000 as a primary goal.

## Planned Giving

19. In addition to making a gift to the proposed campaign, some parishioners may wish to explore planned or legacy gifts. Check the blank next to the item(s) of interest. Materials will be sent to you from the Episcopal Church Foundation **via e-mail**.

- 6   Make a gift to your parish through a bequest in your will.
- 4   Create a charitable gift annuity (minimum gift of \$5,000).  
Benefits of a charitable gift annuity could include:
- receive guaranteed income for life (i.e. current rates of approximately 4.7% annually at age 65, approximately 5.8% annually at age 75)
  - receive an income tax deduction now for the gift portion
  - receive some tax-free income from the investment until your life expectancy age
  - possibly reduce applicable estate and inheritance taxes
  - enjoy the satisfaction that at the death of the final income beneficiary, the remaining principal would go to an Episcopal congregation or entity you designate
- 0   Create a Charitable Remainder Trust with appreciated assets (minimum gift of \$100,000)
- 0   Create a Pooled Income Fund gift for life (minimum gift of \$2,500)
- 0   Donate appreciated real property such as a house, vacation home, farm or business
- 5   Send me the *Overview of Planned Giving* brochure which explains planned gift options further
- 4   Add me to the Episcopal Church Foundation e-newsletter on estate planning.
- 19a.  10  Episcopal Church of the Epiphany is already in my will or estate plans.

Ten individuals have already included the church in their estate plans. Several others have indicated they would welcome information. They will receive information confidentially from the Episcopal Church Foundation.

## **A Final Word**

The Episcopal Church Foundation thanks the leadership of Episcopal Church of the Epiphany for the opportunity to work with the parish family. We enjoyed our work on your behalf and would welcome the opportunity to be of service.

Thank you, and best wishes.

*Section Three:*

**Appendix I:  
Tentative Case Statement**