

The Stewardship Journal

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**From My Desk
to Your Inbox**



**Identifying the Common
Mistakes in Project Planning**



**How Long Does it Take to
Hold a Capital Campaign?**



**A Question
of Timing**

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From My Desk to Your Inbox

What are your plans for the rest of 2024? How about 2025? If your plans include building, renovating or another capital project, the *Stewardship Journal* is in the midst of a series called ***Giving Away the Farm*** where you can learn stewardship consultants' secrets to running your own campaign. This week, Mark Brooks shares the keys to a good start in his article, ***Identifying the Common Mistakes in Project Planning***.

As a follow-up, this week's Bonus Section answers the important question: ***How Long Does It Take to Hold a Capital Campaign***. And last, but not least, timing is everything. Learn key factors to consider in the final post ***A Question of Timing***.

If you have missed any issues of the Stewardship Journal, you can access past issues at stewardshipjournal.com or visit LouisianaBaptists.org/Stewardship.

Keep Looking Up,



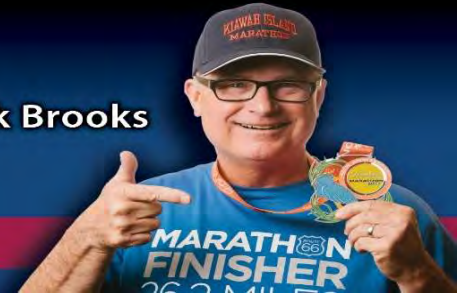
Dr. Steve Hauer

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Mark Brooks



Identifying the Common Mistakes in Project Planning



“You never have to recover from a good start.” My mentor in capital campaigns, Dave Sutherland, drilled that statement into our heads on the importance of planning out a campaign. 99% of campaign mistakes could have been avoided during the planning phase of the campaign. A big part of being a campaign consultant was helping church leaders identify and avoid mistakes ahead of time, giving them a better chance of successfully raising the dollars they needed to fund the dream God had given them. I’m going to do that for you.

I’m continuing my series of free capital campaign advice called ***Giving Away the Farm***. In this post, I delve into the topic of ***Identifying the Common Mistakes in Project Planning***, with the aim of equipping you to avoid these pitfalls. Avoiding pitfalls gets us off to a good start and keeps you out of the ditch from start to finish!

Let’s start by understanding the basics of project planning. There are three levels of project development.

1. **The Project Itself**—Whatever you are raising over and above dollars for. This includes everything from permitting to the final walkthrough for the Certificate of Occupancy.
2. **Financing**—Who will loan you the money to do what you have in your heart?
3. **Funding**—Raising the funds to pay for the financing.

Churches in project development often make critical errors early on, which can significantly hinder their fundraising efforts. I’ll come back to these three levels later in the post.

In my over twenty-five years of working in the stewardship industry, I have found that many churches inadvertently set their capital campaigns up for failure long before the launch of the campaign. This is a recurring issue I’ve observed in my work with the top 100 churches and those running 100 in attendance. Let’s avoid these mistakes.

There are seven common mistakes churches make at the start of project planning. When it comes to developing a project successfully, again, most churches make mistakes far in advance of the start of the project. In this post, I want to share with you the top seven I have seen so that you can learn from them and avoid them. Here are my top seven...

1. The first, and perhaps the most crucial, mistake is not planning far enough in advance. Many churches, caught up in the ‘tyranny of the urgent,’ fail to start the planning process early enough. However, I firmly believe that you can never start soon enough. Long-range planning is not twelve months out. For a project, it is about thirty-six to twenty-four months at least. That is the planning timeline, not the project development timeline! So, it might well be later than you think. Start planning now to avoid this common pitfall. This period is also a crucial time for planting seeds for future commitments.

2. The complexity of project development is often underestimated. This is why the first mistake is so common. Many churches, in their enthusiasm, fail to fully understand the intricacies involved. For instance, I once worked with a client who spent a decade navigating the city’s approval process for their project. There are numerous potential pitfalls that can significantly delay or even derail your project. It’s far more complex than you might think. This is another reason why early planning is crucial. Stay informed, stay prepared!

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3. Overselling the potential to be raised. I talked to a church once that told the congregation they could raise \$4 million dollars. This was two times their operating budget. In their last campaign three years ago, they did not raise their budget one time. They minister in a state still ravished by the economy, with declining membership and offerings. Why in the world would they “sell” the idea that they could raise that much? They are trying to do just that, “sell” the congregation with overly optimistic projections so that the members would vote for the project. I’ll write more on this in a few weeks.

4. Underselling the cost. Trust me, it will take you longer than you think *and* cost you more than you want. If an architect is telling you it “might” cost around \$5 to \$7.5 million, I would use the high number, not the low number. You might want to avoid sticker shock with your congregation, but if the final tab is over what you promised, you lose change out of your pocket with your members. The next time you make a decision, they will remember how you missed it on the last decision.

5. Sequential thinking. I once asked a potential client, “Have you talked to the bank yet?” The reply back was, “How can we talk to the bank when we don’t have the final estimate from the architect?” I replied, “Do you at least have an estimated range of cost?” The answer was yes. I again pressed the need to find out if the range of cost was something they could successfully acquire from banks. If your own bank slams the door on you, it doesn’t mean you won’t find financing, but it won’t be easy. The problem that many churches have is that they view project development as happening sequentially. Project development is like playing chess on three levels. Remember, those three levels are:

- 1. The Project** – Whatever you are raising over and above dollars for.
- 2. Financing** – The lending institution financing the project.
- 3. Funding** – The plan for paying for it all.

You must keep your eye on all three levels simultaneously and in sequence. Each has its own timeline that can and does impact one another. The more complex the nature of the project, the more skill is required for successful planning.

6. Going cheap. Remember the old adage, “You get what you pay for?” The same is true for project development. I often hear churches brag that they were going to run their own stewardship campaign. Then, I watch them make huge mistakes and raise far less than they would have with a professional firm. Large and complex projects that need to raise more than three times your annual operating budget, in my experience, require additional help. The fee you pay will be more than made up by the funds you raise. I’m giving away basic advice but sometimes you need an experienced partner helping you.

7. Not giving enough time before the launch of the campaign. I always say you can’t get an idea on a Saturday night and implement it on Sunday morning. This is especially true for raising over and above dollars. I have found that the larger the amount you need to raise, the longer you will need to give to the process. I believe you need to start your planning twelve to twenty-four months ahead of the launch of your campaign.

Making any of the above mistakes could derail your project and put you in the ditch. When your car goes into a ditch, it does not mean you will never get where you are going. It does mean, however, that it will take you longer and cost you more. My goal is to help you stay on the paved road so that you get there faster with a smoother ride. Avoid these mistakes, and you might even enjoy the ride!



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Bonus Section

How Long Does It Take to Hold a Capital Campaign?

A lot longer than you think. But when I get asked this question they always mean the “public phase” of a campaign. This comes *after* months and sometimes years of planning. In most “public phase” campaigns, the average time is at least six months from initial planning to completion. In some situations, it can and must be done sooner, but they are the exception rather than the rule. Those campaigns typically never raise the same levels of money as those that give more time to the process. Be wary of the consultant who says they can do it in less time. They don’t live there, you do!

Here is one of the driving mantras I preach to my clients...

It’s more important to get the campaign done right than to get it done on some arbitrary timeline.

The question is one of timing, not time. By taking the steps in this post, you can help ensure that your next campaign is successful. My goal is to get you to the start line of your next campaign with the right timing for whatever time of year your campaign is held.

The Six-Month Rule of Thumb is what I like and advise for my clients. I like six months of planning, which then gives you *at least* six months before your call to commitment. However, at times, because the timing is not right, it takes more time.

Here is an overall timeline of the typical public campaign dates to help you get a sense of when they are held. When I say six months, I mean from final planning and initiation of the campaign to commitment weekend. Let’s focus on the various timelines most used by churches.

Spring or fall? Campaign timelines fall broadly into spring and fall time frames. Is one better than the other? In my experience, they typically are not. Again, success is dependent upon timing, not time. What drives the timeline also is your church’s timeline. For instance, if the pastor is going on a safari this spring you probably don’t want to hold a capital campaign then. Trust me, I speak from experience!

To determine the best time for your next campaign, look at your calendar. Capital campaigns don’t totally stop all church activities. Yet pastoral absence, pre-set events, various holidays, etc., all weigh into your calendar planning.

Basically, in the springtime, there are two windows of opportunity...

Pre-Easter Campaign—With this timeline, you would ideally want your commitment weekend to be two weeks before Easter. So, pick out that weekend and back up six months. If I had a preference, it would be this timeline.

Memorial Day or before school dismisses – Here, you want commitment weekend to be about two weeks before school gets out. In most states, this is around Memorial Day. Other schools get out somewhere around the second week of June. Find that date and back up six months.

Fall campaigns – There is really only one timeline for fall. You must have your commitment weekend no later than the weekend before Thanksgiving. Once again, find that date and back up six months from there.

Each of the above timelines has leeway. Yet, for our purposes, this broad overview will help you in your planning and give you the needed time to execute your next campaign properly!

Remember my statement, “**The first and perhaps the most crucial mistake is not planning far enough in advance**”? Let’s avoid that by starting your campaign timeline thinking sooner rather than later.

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A Question of Timing

About this time every year, churches call and ask, "Is it too late to start a capital stewardship campaign?" The answer is, it depends! We joke that most of our answers are, it depends! That is because there are so many variables that go into campaign planning. As I write this at the start of June, let me say that the answer is qualified; no, it is not too late. But it's close to being too late. Let me give you one of my Brooks Mantras, "It's more important to get 'it' right than to get 'it' done on time." It's always a question of timing.

What factors go into knowing whether the timing of your campaign is right? Let me list some key factors for your consideration.

First, what kind of project is it? If you are adopting another church or starting a new campus, you might need more time to help members get their hands around the concept. Understanding the project is crucial, as people will not give to what they do not understand. Most any type of new building takes longer for members to embrace, and thus you might need a longer campaign cycle. However, if your campaign is simple, like debt reduction, then I find you need less time. Most, if not everyone, understands the need to be debt-free. So, the more complicated the project, the more time we like to give to the process to ensure greater success.

Next, where are your leaders? By this, I mean, are they up to speed on the reason you are raising funds? Are they already on board? Your leaders will give as much as 90% of what is given. If you have been communicating with them and have not heard any objections, you might be ready to start your campaign. Tell me where your leaders are, and I will tell you if you are ready or not.

Lastly, ensuring alignment with external factors is a critical aspect of campaign readiness. Consider questions like, 'What is the bank's position on your project?' 'Have local authorities given their approval?' These factors can significantly impact the success of your campaign. It's important to avoid announcing something to the congregation that you might have to retract later. By thoroughly considering these external factors, you can better assess the readiness of your church for a capital stewardship campaign.

Is the church calendar clear? If you have a major missions conference that will fall in the middle of your capital campaign, you need to seriously think about delaying one or the other. A crowded calendar will make for a much more difficult campaign process.

What kind of program/process are you going to use? If you want an old-school multiple-team approach, then you will need longer to effectively recruit and train those lay people who will serve. But realize programs don't raise dollars. Vision does, but you need time to communicate that vision.

How much time will the Senior Pastor commit to the process? The senior pastor is the best at communicating the campaign's vision and thus raising the needed dollars. If the senior pastor is too busy, then I would advise against a launch. Something as important as funding, the vision you have, demands the time and commitment from the senior pastor!

These are some of the keys that we look at as we evaluate the timing of starting a campaign. You will see that I often used the word might. So much goes into a successful campaign. With so much on the line, you need to make sure the timing is right.

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So, how do you know if you still have time for a campaign? Here are some questions to ask...

- Is what we are raising funds for easily explained, or will we need time to get our members up to speed?
- Is the "ask" simple or complex? Explaining debt reduction is easy. Buildings typically aren't.
- Has it been a long time since we held a capital campaign, or is this another in a succession of campaigns?
- Are our leaders already fully on board with what we are raising funds for?
- Are there major issues or initiatives already on our church calendar that would compete with the campaign message?
- Do we as a staff have the time at this time to invest in a campaign?
- Are all the pieces in place, such as building plans, financing, etc.?

These are just a few of the questions you should be asking and thinking about. **Timing is everything when it comes to a successful capital campaign!**