



The Episcopal Diocese of Vermont

Feasibility Study

for

The Episcopal Diocese of Vermont

based on the preliminary case statement:

Spirit and Energy:

A fundraising campaign to equip the saints for mission
and strengthen our diocese for decades to come

Study by Christine Graham, CPG Enterprises, Inc.

cpgraham@sover.net

conducted March-April 2011



Contents

Preface	3
Scope of the Study	4
Summary of Findings	7
Clergy Responses	18
Analysis and Recommendations	19
Executive Summary	23

The preliminary case statement, “Spirit and Energy,”
may be found at www.dioceseofvermont.org



Preface

I am grateful to the Diocese of Vermont and the Capital Campaign Discernment Committee for inviting me to work through this process with them. For almost a year we have explored the needs of the Diocese in Vermont, and attempted to translate those needs into concrete campaign components, develop a compelling Case Statement, and test the results with a small thoughtful sample of Episcopalians statewide. Much has been accomplished, and the effort to engage a broad group of thinkers is well underway.

I particularly thank Bishop Ely for his guidance, patience and deliberate thought; Angie Emerson for bringing me into the process and being a guide as I gathered information; the members of the Discernment Committee for welcoming me into their process; and the interviewees for sharing their frank, honest thoughts. I also want to acknowledge Amy G. Hill, who scheduled my interviews. It is difficult to imagine how frustrating, time-consuming and unmanageable that task is, yet she did it with grace and efficiency and left every interviewee feeling especially well cared-for.

The many wonderful people I've met in this process, the exposure to new ideas, the learning I've done along the way, make this study one of the truly special assignments in my work life. Thank you for inviting me to participate in your exploration of opportunities for the Diocese in Vermont.

Christine Graham
CPG Enterprises, Inc.
April 5, 2011



Scope of the Study

The Episcopal Church in Vermont is facing challenging times and a changing world. As one means of strengthening its congregations and its work, the Diocese is considering a major capital campaign which would help meet immediate needs, and an Endowment Phase that would provide some financial safety net for programs and properties.

The Diocesan Convention authorized a Capital Campaign Discernment Committee in 2007 to explore the feasibility of such a major campaign, including the possible components, goals, and methodology for success. Due to the recession and accompanying national financial uncertainty, the Committee postponed the study until 2009 when Discernment meetings began.

This written report focuses in great part on the findings of the external interview phase, but the process included a great deal more. In sum, the steps have been:

- Initial meetings and discussion by the Discernment Committee
- Selection of a feasibility study consultant
- Identification and refinement of the components of the campaign, including estimated goals based on five working committees exploring the component areas
- Development of the draft Case Statement
- Distribution and discussion of the Case Statement in regional meetings throughout the diocese
- Refinement of the Case based on meetings
- Compiling a list of 35 interviewees from approximately 250 suggested individuals and couples, with names suggested by the Discernment Committee, clergy and the Bishop.
- Scheduling and conducting 29 individual interviews as well as meetings of clergy to discuss the Case and potential for fundraising.

Following submission and discussion of this report, the Discernment Committee will bring recommendations to the Special Diocesan Convention in June. At that meeting, delegates will have the opportunity to discuss the report and next steps prior to voting on a campaign. While it is unusual for such a large group to participate in an open process for determining a campaign, it is the Bishop's way of assuring the participation of hundreds of Episcopalians to question, discuss, and form opinions before a campaign is launched.

For the external study, 29 confidential interviews were conducted with 43 individuals around the

diocese. Three meetings were held with canonically resident clergy, with eleven participating in those meetings. Overall, the participants represented at least 23 parishes of the diocese.

The initial invitation to interview was sent to 35 individuals or couples, and 33 accepted. Three of those were unable to participate due to travel schedules. Two declined to participate, one because of health and another who felt he was sufficiently informed. One other person later asked to participate and was added. Those invited were sent the Preliminary Case in advance, for preparation. The yield, even with those who were unable to participate, is very high for a study like this and shows strong interest.

Each interview lasted about an hour and was conducted by Christine Graham, with the same list of questions for each interview (in the Appendix of this report, which is posted at www.dioceseofvermont.org). The questions were used as discussion starters, and in many cases led to more detailed information and suggestions, which are reflected in the Summary and are more thoroughly listed in the Appendix. The goal was to learn more about the interviewee's relationship, attitudes and commitment to the Church, the Diocese and their local parish, as well as their assessment of other members' reactions to the plans. Questions on the interviewees' potential involvement in the campaign, as donors and as leaders, were critical.

The overarching questions to be answered were:

1. Is a major campaign the right direction for the Diocese?
2. Are the five Immediate Need components and Endowment what is needed, and will they make significant positive impact on the Diocese of Vermont?
3. Will major donors support this adequately to launch and succeed at the campaign?
4. How should the campaign plan be improved, refined, and further designed?

The external interview component of a feasibility study is not a scientific test, and cannot yield reliable statistics or measures. It focuses on opinions: those of a particular group of individuals, highly engaged in their congregations, many involved in the Diocese, and those more able to donate significantly. It cannot be interpreted to reflect the opinions of the whole Episcopal membership in Vermont, but it is intended to reflect the opinions of those individuals who could make the first 60-85% of a capital campaign a success, through their donations, connections, and hard work.

Throughout the Summary of Findings, it is likely that numbers of responses will not add up to 29 or 43: not everyone answered every question, with couples there was sometimes 'a single voice' and sometimes not, and some individuals made two or more pertinent, valuable comments in response to a single question. This report attempts to reflect the depth of their thinking and attitudes more than a numerical response.

The opinions of the clergy who met with the consultant were used as information and perspective, but the specific preferences expressed were not included in the rankings and numerical priorities. The group meeting made it difficult to capture the precise personal

priorities of each person, and in some cases they reflected the opinions of their congregation following participation in regional meetings. The small number of participants would have made honoring confidentiality difficult, were their opinions reported as a 'clergy perspective' in this document. Their recommendations did inform the direction of the report and a brief summary of their comments follows the summary of parishioner interviews.

All interviewees were assured of the confidentiality of their interviews, and therefore no names are attached to the opinions reflected in this report. A small number offered thoughts and suggestions they wanted carried back, or made requests for additional information, and those requests have been honored.

All interviewees were thanked by the Diocesan Ministry Support Team following their interviews, and each will expect some communication following Committee review and Convention actions on this report. A final thank you letter with the Executive Summary, a summary of action, or both, would be an appropriate way to complete the study aspect of the relationship with interviewees, but all should be kept closely in touch with progress from here forward. It would be important to remind the interviewees of the Special Convention in June, as they may be particularly interested in attending or reading the outcome on the website.



Summary of Findings

The backgrounds, opinions, and knowledge base of the interviewees were greatly varied, as one would expect in a statewide survey. However, it is important to remember that most of the interviewees were people with a high level of activity in the Church at some level. The average Sunday-only attendee would probably not have risen to the top of the interviewee list. The opinions and leanings reported here summarize those expressed, with an effort to present both the range of opinion and the priorities or weightings of those thoughts.

To better understand the interview group, note that there were 29 meetings and 43 people participated, meaning half of the interviews were with couples. This is an unusually high participation rate for a feasibility study, and the acceptance rate for interviewing was also high.

Commitment to One's Local Church and Diocese

The individuals selected for interviews are deeply committed to their spiritual life and, in most cases, to their local congregations. About half the interviewees are also involved in some way with one or more other Episcopal congregations in Vermont, and twelve reported being 'deeply involved' with the Diocese. Thirteen said the local church and/or Diocese are their top priority and another thirteen said it was among their top five priorities outside family and work. Only four said it was 'low' and two of those said it was 'declining'. Twenty-two interviewees have, at some time, served as Vestry or Warden locally. Twenty-three reported family members (including spouses) who are involved with the church; most with teenagers or adult children said their children were not involved.

The Activities of the Diocese

Although so many of them are involved with the Church, many interviewees reported a low sense of connection with the Diocese, feeling of its importance in their church life, or appreciation for its work. Eight echoed the sentiment of one who said, "The Diocese is irrelevant for most Vermont Episcopalians and does not affect our lives." Another seven said they did not feel connected to the Diocese, and many said it was unclear what services or benefits the Diocese provides.

At least four strongly expressed dissatisfaction with the 'hierarchy' of the Diocese. They felt it was 'distant' and seemed to ask for more than it provides in return. Geography is a factor in this,

as more Southern Vermonters feel disconnected than northwestern ones, who live nearer the Diocesan office.

About half the interviewees had been to Rock Point or their children had been to camp, and five had been to Mission Farm. There was little praise for the content of their retreats or the accommodations: four agreed that Mission Farm was too uncomfortable to return; many reported that Rock Point was too expensive and unavailable for their members to attend or for retreats; there were some complaints about unfriendliness, discomfort, distance and irrelevance. The natural beauty of Rock Point was a primary draw. For many, Rock Point was the primary component of their knowledge of the Diocese.

The Diocesan assessments are financially stressful. Throughout the interviews, members told of the financial struggles and even crises of their home congregations, and feel the Diocesan assessment is a burden that requires sacrifice. Many try to measure the value of services received, including assistance in calling new clergy, mediation for internal troubles, and convention assembly, and think the assessments are too high for what they get and can afford. Others would like to see more Diocesan leadership in working on international missions and local outreach to the poor, suffering and abused.

For some, the combination of perceived low levels of service and high levels of assessment combines to create resentment. When faced with the new Diocesan annual appeal in combination with a potential Diocesan capital campaign, one said “There is a deeply resentful relationship with the Diocese for many members and churches,” and another, “I suppose it is necessary to support the hierarchy, but I am really only interested in my own church.” Other comments related to wasted time, overstaffing, rigidity and unreasonable expectations. While many of these comments were specific to the interviewee, the accumulated impression is of members feeling burdened by unfair costs in light of concern for their local churches.

These sentiments were more focused on the institution than the individuals: the Bishop is deeply appreciated, as is Angie Emerson, Minister for Stewardship Development, whose help in local churches was often reported with appreciation. It should also be noted that many interviewees say they do not read the Mountain Echo, find the website unmanageable, do not participate in committees because of the time and travel involved, and are therefore increasingly unaware of Diocesan activity.

The Bishop

Vermonters feel very lucky to have Bishop Thomas Ely in this Diocese, and appreciate his warmth, caring, and inclusiveness. They recognize his efforts to bring members together and to solicit democratic participation in Diocesan challenges, and see him as a visionary who understands the ‘essential spiritual direction of the church.’ Some lose patience with the efforts for consensus and would like the Bishop to stake out the goals and lead them there. While some referred to the importance of his work on a national level, there were others who wished he visited their churches more often.

Two concerns that often arose in the interviews were the need for stronger clergy and ministry, and for better communication. Interviewees widely agreed that the Bishop has the ability to address these concerns.

Relationship with Other Episcopal Churches in Vermont and elsewhere

About half the interviewees are involved with congregations other than their own, through committees, mission work, attending when out of state (or country) and with family. The other half are strictly committed to their own local church. There is some concern for the lack of communication with other churches, and for the splits between and within congregations particularly due to GLBT issues.

Some interviewees discussed the unhappiness they felt when an interim priest arrived in their parish, either because they had been so happy with their previous priest or because so many changes were made. Some of them left the church, permanently or temporarily, or attend less frequently and others joined other nearby churches. One said, "I've become a choir Christian; I only go for the music now."

There is also agreement among many members that there are more Episcopal churches in Vermont than the population can support; however no one seemed willing to forfeit his or her own parish in downsizing.

The Case as a Presentation of Concepts

Before discussing the financial feasibility of the proposed campaign, each interviewee was asked about his or her overall personal reaction to the concept of a capital campaign, as proposed. Responses were positive (4), cautiously positive (3), negative (16) and "disappointed" (6).

Those who felt positively about the idea, and another three who described themselves as 'cautiously positive', were still uneasy about a campaign but feel the hope for the Church is with the Diocese. They want to support the campaign and believe it is financially necessary, but worry that will compete with individual churches (especially their own) and acknowledge it would be a challenge regardless of the dollar goal. Among these seven individuals, it would be fair to say their 'positive' response was hesitant and does not necessarily mean they personally would support the campaign.

Sixteen interviewees said they felt 'negative' about the campaign, and every one of them expressed the belief that it would not appeal to other members and that it would compete with local congregations. They felt the goals do not offer sufficient benefit to the congregations, or do not recognize the needs and challenges they face. Several talked about the campaign 'facing inward rather than outward.'

Another six interviewees were 'disappointed' with the plan. They had hopes for it holding an answer they did not find: they feel the Diocese should be addressing social inequities such as poverty and human suffering, not property or communication issues. Many said the goals were vague, the proposed expenditures unclear, and the idea not urgent or moving for them.

In further comments on the Case, interviewees said the plan ‘does not express the concerns of Episcopalians such as the loss of young members and youth programs, finding inspiring leadership in the clergy, and the erosion of membership. They cited the deterioration of local church properties, budgets in deficit, and use of endowments for operating costs (including payment for the Diocesan assessment).

There is recognition by some interviewees that the Diocese also has financial stress. Although some suggest reducing staff, those who are closest to the Diocese are more aware of challenges and compromises to date, and four or five of these interviewees feel the campaign is a necessity to ‘make the Diocese solvent.’ Some feel the timing is bad, and would like to see the Diocesan annual appeal firmly established before launching a capital campaign. They also think time is needed for the Diocese to help members see what the services actually are, so more would give in appreciation. This could be resolved with better ‘messaging’ and more opportunities for engagement, particularly at Rock Point.

The Case as a Document

The Case document evoked negative responses ranging from “jargony” to “terrible.” It is considered vague, too long, generic and old-fashioned. Criticism ranged from style to content: readers would have liked to have the dollar goals at the beginning, specific references to costs and work to be accomplished, and real evidence that the money would make a difference in the critical issues for the Diocese. Many felt the ‘jargon’ and ‘church talk’ left them out of the discussion as they were confused by terminology they did not understand. Overall, the document did not make a strong case, and did not attract or engage the readers.

The Five Components of the Immediate Needs Phase

Interviewees were asked to rank the five Immediate Needs according to their priorities, on a scale of 1 (high) to 5 (low). Many ranked more than one item with the same importance (explaining the 35 #1 rankings below), or did not rank every item, so the averages below take into consideration the number of rankings and of interviewees. For the most part, couples agreed on their priorities. The averages, with the lowest number being the highest priority:

- Rock Point: 2.24 (11 ranked it #1)
- Spiritual Formation: 2.5 (13 ranked it #1)
- Environment and Earth Stewardship: 2.77 (11 ranked it #1)
- Communication: 3.62 (0 ranked it #1)
- Mission Farm: 3.92 (0 ranked it #1)

While there are many variables in the ranking and specific comments are reported below, it is clear that Rock Point, Spiritual Formation and Earth Stewardship are close in the high priority area, and Communication and Mission Farm close in a lower priority area. It should be noted that many people said Earth Stewardship would be the easiest to raise money for in Vermont and rated it high because of that, though it might not be their personal highest priority.

Rock Point: The beauty and treasure of Rock Point is one of the primary reasons people hope to fund it, and several referred to it as the ‘home’ of the Diocese, but there are many concerns as well. The majority of the interviewees do not go to Rock Point and their children or grandchildren do not go to camp; many of them would like to but feel it is priced out of their congregation’s ability, and that it is seldom available to churches because of rentals.

There is great concern about the Bishop Booth Conference Center: its building needs, management, programming, and its geographic distance from most Vermonters. While some say they are ‘waiting’ for the Rock Point campaign, others want to tear down the Conference Center or restrict it for church use.

Regarding a capital campaign, interviewees wanted more detailed data on the work that would be done at Rock Point with campaign funds, and how that might impact their future use of the property.

Spiritual Formation: There is probably more confusion or range of opinion on Spiritual Formation than any other aspect of the study and campaign. For some, the terminology was foreign or uncomfortable, and in one way or another they said “You’ll have to tell me what this means.” Another said, “The Church and Spirituality is number one for me but Spiritual Formation is not on our radar.”

Many interviewees were not comfortable speaking of spirituality, even in an academic or non-personal sense, while others were anxious to share deep feelings and personal experiences, and to urge that opportunities to share spirituality be a large part of the Diocesan work. This often, but not always, seemed a generational issue. At least two, regular churchgoers and active in outreach, said, “This is not for me.” For some, ‘fresh expressions’ was either new terminology, they misunderstood it or were suspicious of it. Three or four were enthusiastic about this. Another three or four emphasized the need for evangelism and would like to see it more prominent in the Case; yet another group had negative feelings and called it ‘proselytizing.’

Regardless of their feelings about ‘Spiritual Formation’ members wanted more information on how the campaign funds would actually be used to promote or encourage spirituality. There was concern that it was simply a means of hiring staff.

A differently written description of Spiritual Formation in the Case might have garnered much more support. Six interviewees agreed with the person who said, “Spirituality is number one for us, but this document does not express it well.” At other points in the interviews people tended to be positive about the need for spirituality, agreeing that, “There is a crying need for this, we are a spiritually impoverished people,” and “middle-aged Episcopalians and Americans want a spiritual life, but do not want infrastructure or hierarchy involved in it.”

Environment and Earth Stewardship: Two aspects of this Case component appealed to interviewees: first, that campaign funds might cycle back to their local churches for improvements, and second, that Vermonters love the environment so much that it would be easy to fundraise for it.

There was very little interest in renewable energy sources, and a very practical interest in knowing exactly how much could be saved in making environmental improvements at Rock Point or their own churches. People looked for efficiency and economy more than innovation. One said, “Sophisticated environmental work and renewable energy are totally irrelevant in a system that does not appear to be surviving for the long term.”

While some think anything environmental in the campaign would attract Vermonters’ support, others think enough is being done in the secular world, and that Vermonters especially are already doing as much as they can. As with other components, interviewees wanted specific data on projects, costs, savings, and efficiencies. They were most interested in campaign funds that would expand the grant funds available to their churches for environmental improvements.

Communication: Communication among churches and members, and with the Diocese, is something most interviewees feel is needed, but it simply did not rank high when weighed against Rock Point, spirituality and the environment. Among interviewees who have ease with, and access to, the Internet, there is a general agreement that the website needs a total revamp, and that it should provide a platform for linking the churches and members as well as linkage to interactive services. Several interviewees with technical knowledge said the costs quoted in the Case were extremely high for such a revamp. Except for those with professional experience, interviewees had little awareness of the wide range of interactive, outreach and educational services that could be included in this. They wanted specific costs, and reassurance that more money would not be spent on studies and consultants.

Those with less interest in the Communication aspect of the Case Statement were primarily uninterested in the electronic forms, and would like to have more one-on-one communication. They are hampered by distance, geography, time and weather. A minority felt the communication was already sufficient, or were not interested in communicating with other congregations.

Mission Farm: Eleven interviewees said they had never heard of Mission Farm or been there. No one ranked it number one in their priorities, although those within about 45 minutes or less of Killington thought it was an asset. Others asked if it actually belonged to the Diocese. People further south in Vermont said if they were going to travel as far as Killington for a retreat, they would just as well go to Rock Point. Another eleven interviewees thought Mission Farm was redundant, and many asked how the Diocese could consider funding it when Rock Point is in such need.

Five interviewees had attended some activity at Mission Farm, and they all complained about the ‘rustic’ conditions; while some said it was a great size and location for certain types of retreats, they personally would not return. Some said it would be appropriate for teenagers, who might find it fun.

What is missing in the Case? After discussing the five proposed Immediate Needs in the Case, interviewees were asked what was missing, based on their own concerns and priorities.

One overwhelming answer was ‘a **focus on youth.**’ This concern came up repeatedly throughout

the interviews, and many feel that youth are neglected, lost, and in trouble; they want to see Diocesan programs focused on children and teens, with consistency and follow up. One summed it up, saying, “We should focus on the one thing that can succeed and have impact, and I think serving kids is it.”

The other highest priority for interviewees is **support for local parishes**, addressing the financial stress they are facing, the challenges in attracting and keeping members, and the cost and quantity of building repairs, renovations and improvements that are needed.

A third area was mentioned by nine people who said the weakness in the proposed plan is that the Church is not **dealing with the ‘real issues’** either in the proposed campaign or in its general operations. They see the real issues including outreach to people suffering and in need, a focus on social and humanitarian causes, ways to link spirituality with social mission, international crises, and evangelism.

Other ideas were proposed, but these three were repeated by nearly all interviewees. Other comments related to finances: behaving in a business-like manner, striving for efficiencies, being more specific about projects, costs and savings, accepting economies of scale, generating revenue and eliminating the unfunded portion of the Diocesan budget.

The Endowment Phase

Sixteen interviewees were very positive about raising endowment funds. Some were positive about this as a second phase of a campaign, but several thought Endowment should come first, one saying, “Just do the Endowment to stabilize the Diocese, and forget the first phase.” Many realized that endowment fundraising often relies on planned giving and bequests and they also felt that should be encouraged. One said, “I used to be negative about endowment but I have come to see it is essential.”

Nine interviewees were negative about endowment in this campaign and another three negative about endowment in general. Their concerns were that Diocesan endowment-raising would take away from local churches, that it would encourage the Diocese to increase its staff and budget, that endowment can be ‘invaded’ and misused by future generations, and that it can make an organization lazy.

Some felt the emphasis should be on the Immediate Needs, and a looming large endowment campaign would be discouraging. They felt it would be hard to raise long-term resources for a church facing so many challenges, and that current money should be spent fortifying the future with new members. Some said it was irresponsible of the Diocese to try to raise endowment from churches that sometimes have to use their own endowment simply to cover the Diocesan assessment.

Will this campaign help the Diocese meet challenges faced today by the Episcopal Church?

Twenty-one interviewees said the campaign will not help the Diocese meet today's challenges. A third of the interviewees said the problems of the Church cannot be solved with money. They feel the church needs to focus on humanitarian issues, relevance, and growth of membership including youth; it needs to focus on the spirituality people are seeking today and also deal with unsupportable budgets in a practical way.

Many repeated their earlier concerns:

- lack of programs and outreach to youth
- looking inward at the Diocese rather than outward to make positive impacts on the world
- the need for dynamic and engaged ministers
- the decline of the Church, and of all Protestantism
- finances, debt, invading endowments, struggle with assessments, and unmet needs.

One interviewee said that although things feel bad, "things may not be bad enough yet for people to be willing to take action."

Interviewees want to see the Diocese focus on:

- support to individual congregations and churches (financial and spiritual)
- youth
- more flexibility in liturgy, days and times of services, types of programs and support, locations of programs
- outreach to people who are suffering
- rethinking the role of the Diocese.

Fundraising: Major Gifts to the Campaign

Despite the fact that most people thought the fundraising goal proposed was very challenging or impossible, only three interviewees thought money would solve the problems. More suggested narrowing the focus from five Immediate Needs to one or two and 'do it right'. One person echoed many, saying, "I feel resentful about this, it is enough to make damage for local churches." Others felt it is enough to "support the image of the Diocese as a large, hierarchical and political institution."

Is it feasible to raise this amount?

Just four interviewees felt it was feasible, but none of them said they would be major donors, and they did not have suggestions for donors who might give \$100,000 or more. They agreed that wealthy Vermonters exist but are well-hidden. They think the goal is very ambitious.

Fourteen thought the goal was not feasible; six said they did not have enough information to know; and one said "I have no idea! I can't even figure out if I will support it!"

The Possible Giving by Members and Interviewees

Just two interviewees thought church members statewide would respond to the campaign. Three said 'maybe' and twenty said 'no.' All interviewees said they thought members who had a campaign ongoing in their local congregation would not give to the Diocesan campaign at the same time.

Among those who did not think the campaign would be supported, some said the Discovery 2000 campaign proved how hard this would be, and others said most of the wealthy Episcopalians in Vermont have died. One said "Now we have old members, but no 'old money'!" Mostly, people felt a campaign would be perceived as competition with needy local churches and would be less inspiring than the local needs. Estimates ranged from 5-10%, of the number of Vermont Episcopalians who might give to this campaign.

Interviewees said the reasons people (including themselves) might not give include:

- the great need in local parishes
- the Case does not say how money will solve the problems
- the Case does not identify the real problems
- people feel disconnected from the Diocese
- Mission Farm is unknown
- there are too many church-related campaigns (local stewardship and local capital campaigns, Diocesan annual appeal, Episcopal relief and other missions, and then the new Diocesan campaign)
- and issues identified earlier: spirituality, jargon, lack of specificity, lack of able donors.

Interviewees were evenly split on the potential giving for Endowment. As described above, some people think the Diocese should skip directly to the Endowment campaign. For them, this seems a wise move, but they admit it would only be supported by a small number of wealthy individuals.

What would be most attractive to donors includes:

- money to local parishes (17 interviewees said this)
- environmental improvements (9)
- programs for kids (5)
- saving the church (2)
- spirituality (2)
- Rock Point (2)
- more clarity and specifics in the Case (3)
- music, and innovation (1 each)

When asked about specific donors for the Campaign, about half the interviewees offered names, which are listed in the Appendix. They suggested a few categories of people, also listed. A core group of individuals were suggested more than once, all being previous donors to the Diocese.

Asked about their own (or their family's) giving, were this campaign to go forward, over a five year period, fifteen interviewees suggested specific gift levels, seven said they would give nothing, five said they would give 'small or nominal' gifts, and four said they were uncertain or would give 'very little if at all.' The total suggested by this group of twenty-nine interviews was less than \$200,000 over a five year period. The gift chart:

\$50,000- \$100,000:	1
\$10,000-\$20,000:	3
\$5000-10,000:	3
\$1000- \$2500:	2
\$1000:	4
\$500:	2
\$0:	7
small, very little, uncertain:	9

The ability to pledge over a period of time was important to twelve interviewees and most preferred a five year option. Fourteen said it would not be an important part of their decision-making.

Among many other comments about their giving, six interviewees said they are already tithing with a considerable portion of their giving going to the local church. However, they consider their gifts to international missions, social and cultural programs in the community, schools and colleges, and other charitable causes, in their tithe. Giving to the Diocese would rank lower. One person who gave to the Diocesan annual appeal said it necessitated a reduction in giving to the local church, which s/he was unhappy about.

Many people might have considered a higher gift if the Case spoke more deeply to them and was more specific. Most interviewees have a high level of involvement in the church and they would have appreciated a Case that spoke to their concerns. One said "This plan makes my heart ache. It is too slow, too unclear, too non-specific and doesn't help us sustain our church."

Planned Giving and Bequests

A large majority (23) think the Diocese is wise to work on Planned Giving possibilities, and they would also like to see Planned Giving promoted more in their churches. They are well aware of the aging Episcopalian membership and hope this can get underway in a bigger way soon; where it has been started, they worry that there has been insufficient follow up.

One interviewee suggested a partnership with an insurance company that could promote insurance policies with the Diocese as the beneficiary. One person reported having already arranged a bequest for the Diocese, and three said they had established a bequest for their local church. Only three people were negative about Planned Giving, because it could compete with church giving, and because they are not ready to think about writing a will.

Helping as a Volunteer in the Campaign

One person offered to serve on a campaign committee, and another two volunteered to look over donor lists; but 21 said they definitely would not participate. Most people were too involved in their own church, unenthusiastic about the campaign or committed to other projects.

Most interviewees expect the Bishop would be very involved in the campaign, and at least ten consider his participation as a solicitor is critical to its success. At least six others would like to see Angie Emerson involved, as well as some local and retired clergy. Another ten people were suggested, and are listed in the Appendix (they are unaware of their ‘nomination’ in this study).

Moving Ahead with a Campaign

Interviewees were split in four nearly equal camps regarding conducting a campaign:

Yes: 7 No: 8 Not as currently described: 8 Maybe: 6
--

However, among all interviewees there are similar stipulations: reduce the size, length and scope of the campaign, wait a while to begin, find ways to benefit the parishes with the campaign. Other suggestions were to deal with the Diocesan budget shortfall first, to raise 60% or more before launching the campaign publicly, and to include more international outreach.

Final thoughts and recommendations:

Most interviewees said they had a good opportunity to express their thoughts through the interview, and some added a final suggestion or thought:

- Though most do not need specific personal follow up to the interview, they do want to know what happens.
- “Put the campaign in the context of a changing church.”
- A great deal of personal contact will be needed to succeed with this campaign
- “Bishop Ely is a strong leader and encourages consensus, is well-liked and admired; so if any Bishop could lead this campaign, he could. But it will still be a huge challenge.”
 - o People will want to see him in a leading role.
 - o People would like to see him as a spiritual leader more than an administrator.
- The Diocese needs to offer more depth and more diversity in spiritual growth and communication, before it can expect significant giving to this campaign.
- Members would like to see the Vermont Diocese more directly involved in missions, social causes, helping those suffering here and abroad.
- The message should be: “Yes your church needs help, but your Diocese needs help in order to help your church.”

- It is critical that the church reach out to younger people: to those 25-35 and 35-55 groups, to youth, and to children. Programs and retreats are needed for them, enhancements to the camp for kids, options and flexibility in church services, programs, outreach, and education.

Summary of Responses in Clergy Interviews

Three meetings of clergy were held, in Manchester, Shelburne and White River Junction. A total of eleven individuals attended. Opinions and comments ranged widely, and similar sentiments were expressed as in meetings with parishioners. The dominant messages continued to be concerns for the local churches, for loss of membership, for meeting the needs of youth, for changing needs and expectations by parishioners, and for the difficulties in using Rock Point as a retreat for Episcopalians statewide.

For some but not all, there is concern about a sense of disconnection from the Diocese, augmented by a desire for greater communication and support from colleagues. Like their parishioners, they appreciate the Bishop's presence whenever possible, for preaching, building relationships, and leading Spiritual Formation.

There were concerns about the size, timing, components, and overall wisdom of a capital campaign at this time. Somewhat more strongly than parishioners, the clergy mentioned the Diocesan annual appeal - some hoping it would be given time to get established before a capital campaign, and some feeling it was misunderstood or distracting. (Note: The interviews were conducted in the midst of the annual appeal and some interviewees had not received a request, while all clergy knew about it.)

The clergy were somewhat more inclined (than other interviewees) to support the Spiritual Formation component of the Case and somewhat less interested in environmental measures, except in direct support for building improvements. Most were anxious to see Communication, particularly the electronic and website improvements. Feelings about Rock Point and Mission Farm reflected geographic proximity.

While the majority of the clergy did not support moving into a capital campaign at this time, most recognize the importance of improving Diocesan finances and property management funding. They suggested several ways to prepare better for a campaign: establishing the annual appeal solidly, waiting two or three years, allowing the economy and job market to improve, bringing more church members to Rock Point, lowering the goal, narrowing the focus of the campaign, and defining the specific purposes and impacts of the campaign more thoroughly. Clergy were supportive of promoting Planned Giving and most thought bequests would be either for individual churches or for Rock Point.

The most powerful, repeated message from clergy was certainly concern for the financial struggles of their own churches and the impact a capital campaign might have on them. Each congregation is challenged in its own way, and any anxiety expressed by the clergy in these meetings clearly sprang from stress in their own churches.



Analysis and Recommendations

A successful capital campaign combines a compelling Case for Support with a powerful group of influential and generous donors who will give and work to make certain the community's leaders and philanthropists understand and support the cause.

The opinions expressed in this study were deep, wide-ranging and complex. However, in asking the basic question, 'Can the Diocese launch a major capital and endowment campaign?' the answer, and the rationale, is simple.

Based on the interviews in this study, a campaign as described in the Case Statement is discouraged. The Diocese would be wise to rethink and reconfigure its plans, based on three primary concerns expressed by the majority of interviewees:

1. Vermont Episcopalians today are more committed to, and more worried about, their local churches where budgets, building needs and declining membership are threatening their future.
2. While the five components of the Immediate Needs phase are real and powerful issues in the Diocese, there is not enough agreement about priorities, not enough specificity on spending campaign funds, and not enough certainty that fulfilling these Needs could change the future of the Church.
3. Vermont Episcopalians do not feel connected enough to the Diocese to invest significant amounts of their time, money and effort in a campaign for the Diocese at this point.

The Case: While the size of the tested campaign was a realistic (or modest) amount to cover the demands of five Immediate Needs, the interviews suggest that members would be more likely to respond to a smaller campaign with a much more restricted and specific purpose. Unfortunately, there was no overwhelming top priority among the needs, but there is enough overlap and crossover among the top three areas, that a new vision for the campaign could be developed. This would include Rock Point, Spiritual Formation, and Earth Stewardship, each significantly reduced from the original Case.

A campaign blending those three areas would still suffer from members' feelings of distance or lack of attachment to the Diocese, and from their severe concerns for the local churches.

A successful plan to move forward can include solutions to these feelings of detachment and viable means for help to local churches, as well as a melded plan that could focus on spiritual development, Rock Point and plans for environmental efficiencies.

Giving: Based on interviewee assessments of their own giving, and a 4-6 times ratio between the study and the campaign, even if some of these interviewees were underestimating their own gifts (which did not seem to be the case) the highest realistic goal would be a campaign of \$1 - \$1.25 million. No gifts were suggested over \$100,000, despite the gift chart requiring thirteen gifts from \$100,000 to \$1 million. There are people on the 'suggested prospects' list with the capacity to give at that level based on their previous gifts, but there is no assurance they would give in those levels for this campaign.

Campaigns are emotional creatures, and it is certainly true that one highly visible and inspiring gift can turn around a discouraging situation. Such donations are sometimes magical surprises. It is also possible some changes in this Case could elicit new and unanticipated gifts.

Prior to the final decision about a campaign, I would strongly suggest personal meetings with some of the possible donors who were not interviewed, including solicitations for pledges. If those meetings indicate radically higher giving, the campaign goal could be reconsidered.

Currently there is not enough enthusiasm for the Case, and not enough potential giving to meet the goals. If significant surprises do not surface, I would suggest a revamp of the goal, the phases, and the components of both phases as well as some other preliminary work before launching a major campaign in order to enhance the opportunities for success with a campaign.

Recommendations

While revamping the campaign plan, the Diocese could begin work immediately to improve the receptivity of its members to a campaign, by helping them connect more deeply with the Diocese. Some of these ideas were suggested in the current Case, but could be implemented in part, at less cost, and with more engagement than originally suggested.

1. **Communication:** The website must be improved as soon as possible; every day fewer people take the time to read a print journal the length of the Mountain Echo. This is underway and will make a highly positive impact on the members; it will lead to interactive long-distance meetings, support meetings and trainings, and other experiences that will link individuals and congregations, building a stronger sense of unity.
2. **Fundraising Collaboration with congregations:** Both the local churches and the Diocese need to raise money, but as long as they compete, both lose. The creation of a shared plan for fundraising on special projects or planned giving, or both, would help raise more money and better relations at the same time. There is a start on this with Angie Emerson's work as Minister for Stewardship Development, but this suggestion is for more: for actual solicitations in partnership, with the proceeds shared between the church and the Diocese. The variations on this can be developed, but might include the church raising money for its immediate local needs while the Diocesan share goes to endowment, etc.

3. Education: Expanding church visitations by Diocesan representatives offering information on Statewide, National and International activity. These visits could be made by informed, involved laypeople; they should be tied to church services and made easy to access. Videos of the presentations could be on the website afterwards. Volunteer opportunities could be offered.
4. Reaching Youth: Developing short (weekend, overnight), very inexpensive (or free) experiences for teens at Rock Point at various times of year, combining outreach, outdoor activity, nature, spiritual education and discussions. This could include volunteer work such as trail clean-up and other Rock Point maintenance.

The purpose of these four steps would be to wake people up to the work and reach of the Diocese, demonstrate a commitment to youth, jumpstart better communication statewide, and provide tangible results-oriented fundraising help.

As much as possible, the skills and professional expertise of Vermont Episcopalian laypeople should be utilized. There are great talents in the Diocese, and people are always more engaged when they are part of the solution.

The Diocesan campaign itself could start in a year or two (dependent on progress on steps 1-4 above) and consist of two parts which would run concurrently:

- *Supporting the Church Today: Spirit and the Environment*
- *Supporting the Church for the Future: Planned Giving*

Each prospective donor would be asked to make an immediate gift and also to establish a Planned Gift (at any level) through bequest, insurance, a retirement account, or a more complex trust or annuity. The immediate gift would benefit the work of the Diocese (separate from any collaborative project-related giving that the church and Diocese might have requested) while the Planned Gift could be designated for the Diocese or as a split between the local church and the Diocese.

Supporting the Church Today: Spirit and the Environment could be a \$2 million campaign where the tangible goals will be:

1. To improve Rock Point: making basic, necessary repairs and upgrades, and energy efficiency improvements; and to underwrite reduced fees for church retreats, transportation assistance, and elimination or reduction of commercial rentals.
2. To establish more Spiritual Formation programs including those for youth, young couples, families with children of specific age groups, and specialized groups (i.e., recent retirees, adult children serving as caregivers, etc.)
3. To create a grant program for parishes in tackling their greatest needs, whether tangible or not: environmental improvements, outreach in the community, conducting retreats, program development, access, expanding the schedule of services, etc. While some of this may be happening, more financial and advisory help from the Diocese will make a big difference and will build the connection between parish and Diocese.

It is clear from the interviews that prospective donors will want real data on the amounts, costs, allocation methods, and other specifics on these three areas of work. This added information may prove useful in raising more money than originally anticipated.

Supporting the Church for the Future: Planned Giving: This would be a permanent ongoing effort, but initially a goal will make it easier to grasp. It should be a large goal and long term such as \$10 million in 10 years. The intention would be for proceeds of Planned Gifts to fund Diocesan Endowment, but donors could request a different restriction. Gifts would only be announced when realized, but a list of Legacy Commitments and acknowledged in the Mountain Echo and online (with donor permission). Great care will be required in determining the right time, respecting the plans of each congregation when approaching Planned Giving prospects.

In sum: The plan proposed is designed to make this an opportunity to move forward to increase membership, deepen spiritual life as members choose, raise necessary funds, complete critical work, and build strong churches and budgets. When these issues are in resolution, the feasibility of a major campaign would change dramatically.

Many other comments from interviewees will provide guidance in developing the new plan including comments about clarity, specificity, language, etc. Those are technical issues and easy to accommodate once the direction is determined.

The Diocese has so many devoted, serious, thoughtful members who would like to be part of a whole that serves all members well. When they begin to feel their churches are growing stronger and their membership in the Diocese is productive, financial generosity and stability will follow.



Executive Summary

After two years considering a capital campaign, a devoted committee working with Bishop Thomas Ely developed a comprehensive document outlining a two-phased campaign: \$5.625 million for immediate needs spanning Spiritual Formation, Environmental Stewardship, Communication, Rock Point, and Mission Farm; and a second phase of \$5.5 million for Endowment that would help stabilize finances and maintain properties for the long term. These goals were ambitious but not high compared to need.

However, interviewees were concerned about a range of challenges that made them reluctant to endorse the campaign as suggested. In their congregations, members are seeing budget stress, rapidly declining and aging membership, deteriorating buildings, and an uncertain world that brings into question the outreach and spirituality that would otherwise be their touchstones. Along with these concerns, many members feel disconnected from the Diocese. For some it is difficult to see, but others understand that they need a strong Diocese so their churches can get help.

The Diocese has the opportunity, based on opinions expressed in this study, to invest time first in solidifying the connection between congregations, members and the Diocese, and helping the local churches repair their sagging budgets as well as their compromised buildings. With much enhanced and modernized communication, and more outreach to youth, the foundation will be laid for a strong, though modest, capital campaign run parallel with a Planned Giving program. These efforts will be most successful when fundraising is a collaboration between the congregations and the Diocese, both in asking and in receiving.

After the preliminary efforts are underway, the Diocese will be well-positioned to conduct a three-to-five year campaign to raise \$2 million which can be devoted to a combination of property and program enhancement that joins together spiritual formation, use of Rock Point as a spiritual centerpiece for the Diocese, and enhanced assistance to congregations as they face their greatest challenges.

The Diocese has many devoted, serious, thoughtful members who would like to be part of a whole that serves all members well and reaches out to others. As they begin to feel their churches are growing stronger and their membership in the Diocese more productive, financial generosity and stability will follow.