

Stewardship Advocates

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Annual Giving Program Development

Every parish and church organization struggles to fund the annual operating budget. Rare is the church institution that oversubscribes its budget through voluntary giving. Yet it is voluntary giving that is one of the most effective means of deepening commitments to a parish or church organization. Giving regularly and generously is a habit of the heart that bears much spiritual fruit.

Practically speaking, those who have learned to honor a sacrificial pledge for annual budget support are the leading candidates to give major gifts to a capital campaign and planned gifts in their estate. Parishes and church organizations that do not have an effective annual giving program in place face an uphill battle in any capital campaign.

Stewardship Advocates has designed an annual giving strategy specifically for Orthodox parishes. It is a method that once learned, can be administered each year by the parish leadership with minimal (if any) further professional assistance.

Working with Stewardship Advocates, the strategy consists of a position analysis, a seminar with the parish leadership, the development of a fundraising plan specifically designed for each parish's unique circumstances, prospect evaluation and review, volunteer training and then the actual implementation of the annual giving program.

Capital Campaign Position Analysis

A Capital Campaign Position Analysis typically examines a campaign presently underway that may be stalled or experiencing difficulties. The purpose of the analysis is to understand the basic goals of the campaign, the present organization of the campaign, the present state of the campaign and what fundraising methodologies have been utilized.

The Position Analysis seeks to identify obstacles to moving forward and offers recommendations designed to provide acceptable and workable solutions. It is the application of professional training, broad experience and objectivity that allows new thinking and creates renewed energy going forward.

Campaign Planning Study

A campaign planning study assesses potential support for a proposed construction, renovation, land acquisition or endowment project by completing a number of confidential interviews, facilitating focus groups and conducting surveys of the supporting constituency. Along with assessing the viability of a project, a study clarifies the mission and fundraising goals of a parish or church organization to its constituency.

To formulate an accurate assessment of constituent support, a planning study professionally analyzes the raw data collected and measures the mood and tone of the constituents. Specific recommendations are presented to the parish council or governing board in a detailed final written report. Stewardship Advocates also comes to the parish or institution to present the findings in a PowerPoint presentation and to answer questions.

These are the benefits of conducting a planning study:

1. Assesses the potential support for and viability of a proposed development project;
2. Clarifies the goals and objectives of the proposed project;
3. Enlists community leaders to champion the cause;
4. Provides cultivation opportunity for donor prospects to become more involved;
5. Examines the institutional capacity of an organization to manage the added flow of information and office tasks;
6. Gathers critical information that allows an intelligent and professional development of a fundraising plan;
7. Identifies a reasonable fundraising goal and a stretch goal;
8. Allows the parish or institution to assess the competency of the consulting organization.

Establishing and Building an Endowment

The growth of endowments is an encouraging trend in the Orthodox Church. Endowments enhance service, stabilize programs, ensure against unforeseen catastrophes, and often support worthy causes beyond the parish. Sometimes however, endowments serve darker purposes. They may lull parishes to sleep or cause divisions when fierce debates arise concerning their use or how they may be restricted. Endowments can discourage sacrificial giving and encourage superficial church involvement and cynicism.

Stewardship Advocates applies professional development theory and methodology for endowments within the context of Orthodox ecclesiology and the realities of parish life. Endowment building is a highly technical field requiring expert counsel. It requires the implementation of a long-term strategy that accords to every church member the possibility of making what may be their largest gift ever to the institution they cherish most.

Stewardship Advocates can initiate a program or enhance an existing endowment building program in your parish or church organization. An endowment building program will assume many of the characteristics of a capital campaign including a leadership team, educational and training seminars, specific fundraising goals, major gift cultivation and solicitations.

Executive Counsel for a Capital Campaign

The use of executive counsel is an excellent approach for parishes or church organizations that desire the direction and involvement of an experienced, Orthodox, fundraising professional during a capital campaign. Utilizing this approach, Stewardship Advocates provides continual support to a parish or organization in a capital funds drive with regular visits during critical junctures in the campaign.

The learning exchange and transfer-of-knowledge that takes place between the leadership team and the consultant makes executive counseling of great long-term value to a parish or church organization. Executive counseling is particularly effective in solving issues that keep a project from moving forward and that may need to be addressed over a period of time. Whether the obstacles are in the internal fundraising operation, the planning, or among constituents, periodic counseling guides parishes and church organizations through the process that will bring success.

Stewardship Advocates has developed a program specifically designed to assist Orthodox parishes and church organizations at each step of the campaign. The program includes a campaign planning study, assessment of fundraising capability, training seminars, prospect research, strategy sessions, and expert counsel on fundraising literature and methodology. Following the campaign, fundraising expertise is now located within the leadership of the parish or the church organization.

Introductory Planning Program

Thoughtful planning is critical to the successful fulfillment of the mission of the Church. We wait upon God, yes, but God expects good and faithful servants to multiply the talents given to them.

Stewardship Advocates offers an introductory planning program that enables church institutions to begin professional planning. Introductory planning can be used to set up a business plan or cultivate and implement the organization's management intent.

Working with the leadership team, Stewardship Advocates designs a specific planning program that address each parish and church institution's needs. A variety of methods are offered, and can be tailored to the specific objectives and capabilities of the parish or church community. Possible outcomes include formulating a mission statement, identifying and prioritizing needs, undertaking the initial description of a building or renovation project, community consensus building, structuring a project development schedule, etc.

Major Gifts Program

Most parishes, dioceses, institutions, organizations or agencies of the Church have a few supporters who are blessed with extraordinary wealth. Many of these individuals have made very large gifts to non-Orthodox charitable institutions but not to the Orthodox Church. This is not a mystery. The primary reason is that until very recently, the Orthodox Church had not developed the internal ability to generate these gifts. Large universities, hospitals and cultural institutions have a full complement of fundraising professionals whose expertise generates major gifts.

The art of major gifts is a highly specialized discipline that takes years of training and experience to master. A major gift prospect may take several years to bring to fruition in terms of a five-, six-, seven- or even eight-figure gift. Stewardship Advocates can work with you on an ongoing, case-by-case basis to coach, assist, and enable you to raise these extraordinary, "institutionally transforming" gifts.

Parish Council or Governing Board Development

Though most universities, hospitals, and service agencies have learned the value of a deliberate program of board development, the Orthodox Church continues to lag in this area. The difference between governance and management is not always easy to discern. Yet it is precisely this blurring that causes so much misunderstanding in a church institution.

Board development brings the best of leadership to the fore, maximizing the talents, gifts and strengths of the leadership team.

The most important asset of any church institution is a fully developed governing board or parish council. Unfortunately, the reverse is also true. An undeveloped board can easily become an adversarial or intrusive board. For a board to be active and effective the staff must understand the theory and methodology of board development. Governing boards constantly evolve and devolve. Therefore, a conscientious, ongoing program of board development is required.

Boards are complex organisms. Beyond the full board assembly there are committees that may also benefit from the involvement of a consultant. It is difficult to disassociate board development from the tasks of board work. These include governance, strategic planning, the recruitment and nomination of future board members, board self-assessment, determining mission and purposes, participating in the selection and monitoring of the performance of the institution's leader, preserving and expanding capital assets, fiduciary oversight, ensuring legal and ethical integrity, and the embodiment of Orthodox faith.

A board development process might include an independent review of board documentation, a board self-assessment (sometimes called a "self-evaluation"), observation of board meetings by the consultant followed by a written report to the priest and parish council chairman or the CEO and the board chair. Other strategies may include teaching seminars on board development, service and organization; a study of how information is presented to the board, at what level, and in how much detail; the compilation of key strategic indicators for board reporting; leadership retreats and the distribution of board development materials.

Philanthropic Audit

As differentiated from the Campaign Position Analysis, which typically studies a capital campaign presently underway, the Philanthropic Audit closely examines the stewardship program, major gifts, endowments, history of giving and methodology of fundraising in the parish. It ascertains the depth of understanding and readiness to practice the biblical standard of sacrificial giving. Areas impacting giving to the parish such as parish communications, financial management and information management are also examined.

The study utilizes three or oftentimes four methods to gather information: personal interviews, a focus group, document review and a general parish survey. The deliverable is a written report identifying strengths and challenges before the parish as relates to financing the work of the parish and offering a number of recommendations on establishing new revenue programs or improving upon existing revenue programs.

Seminar on the Sacrament of Stewardship

Are Orthodox Christians good stewards? Some, yes. Perhaps many. Yet the sacrament of stewardship has not been consistently practiced in the Orthodox Church for many centuries. There are several reasons for this unfortunate lapse. The long history of state-sponsored churches, the imperial tradition of czars and kings, the suppression of the Church under Islam and perhaps worst of all, the strict limitations placed upon the Church under communism to engage in philanthropic or charitable work have all taken their tolls. In our own time, the secularization of social services has deprived the Church of its historic role in society to serve the needy.

In a seminar designed to facilitate discussion, self-examination and discovery, Stewardship Advocates helps those attending to understand the vital importance of stewardship in the personal Orthodox Christian life and in the corporate life of the Eucharistic community.

Strategic Planning for Parishes and Church Organizations

Strategic planning is the systematic examination and critical evaluation of parish or institutional structure, organization and activity. It is the bold and humble attempt for a parish to see itself as it really is, an achievement which when applied to creatures, as St. Isaac of Syria has said, is a miracle greater than raising the dead. It is the deliberate effort to be delivered from what St. Gregory of Nyssa called “the tyranny of tradition” which prevents peoples and institutions from doing God’s will in the actual conditions and circumstances of their real life and work.

No phrase in church development is more misused, misunderstood or misapplied than “strategic planning”. For many, the most common planning tool – the annual operating budget – serves as the strategic plan. For others, an internal business development plan is called a strategic plan. Still others use the term to describe a wish list or a task list drafted by a committee of the parish council or governing board.

Simply stated, strategic planning is exercising a choice for a preferred future. Strategic planning in the church environment is more challenging than in the for-profit environment. It is difficult to measure how well a parish or church institution is accomplishing its mission. How does one define “success” in the church? The bottom line is not customarily measured in quantity or dollars but in the quality of service rendered.

The goal of a strategic plan is to give credible specificity to the vision of a church institution. The vision of a church institution is the tangible expression of its mission in future terms.

Strategic planning is a deliberate process. It includes a number of steps and broad constituency involvement. Stewardship Advocates can manage a strategic planning process for your parish or institution. Professional counsel brings necessary objectivity. At the end of the process a clear plan of action emerges, critical community consensus is created, credibility is built, and dollar figures and resource requirements are attached to goals and objectives. These are then scheduled on a calendar. A blueprint for the organization is fully realized and embraced, and the parish moves forward with a clear purpose.

The strategic planning process often leads to a capital campaign. The reason for this is simple. At any given time, at least 95% of the operating budget of a parish or church institution is earmarked for necessary, legitimate, ongoing expenses. Therefore, 5% or less of an operating budget may be available to initiate change. To substantially advance a parish or church institution after a strategic planning process has identified the long-term goals and short-term objectives, very often new funds must be raised.

Three-Day Stewardship Weekend

The three-day stewardship weekend offers a comprehensive opportunity to orient or re-orient the parish to the sacrament of stewardship. The event includes the possibility of educating the leadership of the parish in the theological and spiritual necessity of stewardship together with practical strategies to move the parish forward followed by a written report with recommendations on how to proceed.

1. The weekend begins on Friday with an assessment of present fundraising activity and the existing stewardship program of the parish. The assessment includes interviews with 6-7 key leaders, including the priest, of course; an examination of the present way in which giving information is managed in the parish; and finally on Friday evening, a focus group of 8-10 parishioners and the priest discussing the opportunities and challenges to the good practice of stewardship in the parish.
2. On Saturday an all-day seminar from 10 AM to 4 PM is open to the entire parish. The content of the seminar is the theology of stewardship together with practical strategies of improving stewardship in the parish.
3. With the permission and the blessing of the bishop and the local priest, Fr. Anthony would assist with divine services on Sunday morning, preaching the sermon.
4. Finally, Fr. Anthony would return to his office to write a "Philanthropic Report" specifically addressing the practice of stewardship at the parish, offering a customized professional analysis and recommendations on how best to proceed with the development of stewardship in the parish. Within a few weeks the report will be sent to the priest.