<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thank You</td>
<td>3</td>
</tr>
<tr>
<td>Executive Summary</td>
<td>4</td>
</tr>
<tr>
<td>Findings</td>
<td>5</td>
</tr>
<tr>
<td>Recommendations</td>
<td>18</td>
</tr>
<tr>
<td>Recruitment Suggestions</td>
<td>28</td>
</tr>
<tr>
<td>Proposed Campaign Infrastructure</td>
<td>32</td>
</tr>
</tbody>
</table>
Waitsfield UCC is a strong congregation with deep connections to its neighbors and town. It is also a warm congregation, with caring and compassionate faith leaders and lay leaders. Beyond its members, there are many friends of the congregation who value its cultural, social, and spiritual impact and want to help sustain the building and the congregation.

While there is much work before the congregation, we have little doubt that with commitment Waitsfield UCC will be able to launch a successful capital campaign. This campaign will generate revenue to shore up the church’s physical plant. It will also be an opportunity to “rebrand” the church for the greater Mad River Valley and to generate new interest in the role the congregation plays in the community.

We would like to extend our sincere thanks all those whose cooperation and dedication helped make this feasibility study a success and a wonderful personal experience.

It has been a great pleasure to work with Waitsfield UCC. We look forward to a continuing relationship as you take the critical steps in restoring both the building and supporting the mission of the congregation.

Sincerely,

Gianfranco Grande and Tuomi Forrest
Partners for Sacred Places
EXECUTIVE SUMMARY

Waitsfield UCC contracted with Partners for Sacred Places to study the feasibility of launching a fundraising campaign to renovate and restore the physical plant. The goal of the study was to gauge opportunities and challenges in the following areas:

- Philanthropic appeal of proposed project(s)
- Capacity of staff and lay leadership to undertake the project
- Perception of the congregation among congregants and community members
- Gift potential of interested and committed donors

Methodology

In conducting this study, Partners for Sacred Places (Partners) conducted a series of thirty-three private, confidential interviews with individuals representing a variety of congregation and community constituencies. Based on the results of these interviews, and of reviews of the congregation’s giving history, Partners developed this report to analyze the feasibility of the proposed campaign and to advise the congregation of the necessary next steps to achieve its goals.
PROJECT PRIORITIES

• **Be Courageous** – A significant majority of interviewees expressed an openness toward the consideration of a campaign. While this sentiment was tempered with a desire to have a solid plan in place for raising funds, managing construction, and ensuring sound stewardship and maintenance after the building program is completed, there was broad general support among interviewees to proceed with a campaign. This was a sentiment shared both by church members and community stakeholders interviewed. For the considerable investment of time, money, and other resources necessary for a campaign, interviewees wanted to feel like it was “worth it” – that the campaign had an ambitious yet realistic financial goal and project plan.

• **Building Priorities** – We discussed the following broad building projects with interviewees: Basic building repair and restoration, especially restoring the slate roof; enhancing access with a new lift; updating and re-furbishing the downstairs space (classrooms,
office, social hall, kitchen, restrooms) and potentially building a new wing on the rear of the church. We also discussed general base level costs associated with these potential projects.

- **Existing Historic Structure**
  Interviewees all spoke to the need of preserving the historic building, particularly the roof, and thought this piece should be core in any potential campaign. This consensus is also in alignment with the general sense of the church’s iconic status in the town and Valley and the need to preserve this key cultural asset.

- **Lower Level Space**
  Most people agreed that the downstairs space, though currently functional at a basic level, was not attractive and could be laid out better. Basic updates were desired to enhance its usability and comfort level for both church members and congregation-related activity and for guests and others using the space for community events. Similarly, most everyone saw the utility in enhancing full accessibility by replacing/updating the existing lift.

Apart from general agreement that refurbishing these existing spaces should be part of a potential campaign, there were some differing opinions on the proper aesthetic for the space. Some preferred a more traditional look, others something more contemporary that might signal to non-church members that the hall was “community” space. We will discuss separately, in “Recommendations,” concepts about use of the space, but will note that there is certainly some link between the design/aesthetic and ultimate primary and secondary uses of the spaces.
Finally, we presented as a concept the idea to build a new addition to the rear of the existing structure for the purpose of providing additional functional space (offices, expanded rest rooms) and possibly rooms for individuals or families in need of short-term housing.

Unlike restoring the historic building and re-furbishing its downstairs spaces, the concept of a new addition, especially with its proposed use, was not generally supported by those with whom we spoke, at least as part of an initial campaign.

Most people recognized the need in the Valley for additional support, services, and resources for those in economic distress and saw the work that Rev. McHugh and other clergy were doing in this area as important – even if that work is often not fully known or recognized. Many saw providing short-term housing as one specific type of service as something that was needed in the Valley. However, both church members and community members had many questions about how to pursue this goal, what Waitsfield UCC’s role might be, and whether that role would be one of a direct provider of housing. The questions generally related to three areas:

*Management*

People questioned the congregation’s ability to manage the in-take of and interaction with people needing the housing and pointed to additional physical plant maintenance and costs associated with this type of program. Some mentioned that perhaps a social worker might be hired as a joint congregation-community effort to help assist people, and this person might have an office at the church. There might be other organizations with which the church could partner as well.
Location
Some interviewees mentioned that placing such housing in this location would make it more obvious to the general public who was accessing/using the facility, thus compromising the privacy of the people in need of the housing. Alternately, some mentioned the church had the opportunity, if thinking about refurbishing existing facilities and/or creating new space, to open the rear of the building to the views and green space/field access behind the church.

Best Use of Resources
As Waitsfield UCC owns a house, now used for rental income purposes, some suggested that repurposing this facility for temporary housing might be more financially feasible and offer a better fit in terms of location, access, etc. Given that a new wing may cost between $400,000-500,000, many thought that this price, combined with the costs of work needed on the existing facilities, was too high for a single campaign.

In sum, there were such a range of questions and concerns related to this concept that we suggest not including an addition as part of any campaign at this point. If there is continued interest in such a project, we suggest a formal planning and discernment process to better assess the need for this type of facility: its ideal location; costs and management structure necessary to run such a program/facility; and what role the congregation might have in this endeavor.

• Long Term Thinking – Refreshingly, in contrast to many congregations with whom Partners has worked, interviewees put a much higher priority on long-term solutions than quick and easy fixes. Approaching a capital campaign with a strong contingent of congregants who are focused on sustainable solutions is important. Some interviewees understood their own personal priorities for
the congregation may not be the same as what is best for the congregation overall. Despite this, these interviewees expressed willingness to invest in a well-planned and well-managed capital campaign.

- **Facility Planning** – Partners echoes the recommendation heard from some interviewees that the congregation work with an architect to get a complete building conditions assessment or a master plan for its physical plant. In the short-term, this type of planning will help the congregation itemize the anticipated costs of several capital improvements that may factor into the capital campaign. In the long-term, this document will ensure the congregation is able to budget for major capital needs for the next decade and beyond. Finally, this document is an excellent resource to have on hand during a capital campaign. Donors, especially those considering large gifts, want to be sure their funds will not be wasted – a master plan helps reassure donors the congregation is pursuing the campaign within a larger, longer-term strategy to maintain its physical plant and bolster its presence in the community.

- **Timing** – A few community stakeholders who were supportive of the campaign at Waitsfield UCC expressed some concern regarding the timing of the campaign and its launch. Because Waitsfield is an engaged community, there are a number of annual fundraisers and the potential for other capital campaigns in the future about which the congregation will have to stay informed and mindful. It is important to mention that interviewees who cited concerns still believed the campaign was necessary and possible but wanted, for the sake of its success, to ensure local fundraising schedules were considered as the congregation began to lay out its campaign timeline. Of note, the possible campaign for accessibility improvements to the Library would not appear to significantly conflict in terms of timing or donor/funder overlap.
CAPACITY

• Clergy – The vast majority of interviewees expressed genuine affection for Rev. McHugh and expressed respect for her work within the walls of the church and the community at large. Even those who critiqued minor aspects of her leadership and pastoral style reported to Partners that they had the utmost confidence in her moral character, intellect, and spiritual guidance.

While confident in her capacity to lead the congregation on a day-to-day basis, some interviewees expressed concern that Rev. McHugh was new to capital campaigns. This is a concern that can be acknowledged, addressed, and allayed by hiring a strong consultant to manage the capital campaign and train Rev. McHugh and lay volunteers in fundraising techniques.

• Council – The role of lay leadership is often as important, or more important, than the role of the clergy. Before launching a campaign, Waitsfield UCC’s council must be in a position where they are ready to build momentum among donors, maintain enthusiasm among the congregation, and manage and oversee major financial decisions. Among interviewees, there is near universal appreciation and respect for the current council.

However, as the congregation prepares to launch a capital campaign, there is some concern the current council may be stretched with many day-to-day tasks and thus struggle to provide oversight necessary during a capital campaign. In preparation for the launch of a campaign (and to ensure the long-term health of the congregation), Waitsfield UCC can begin to identify members with a range of skills and experience who are willing to join a future campaign steering committee. During the interview process, we identified many people within the congregation who could play leadership roles as well as important supporting roles in planning and executing a campaign. Also, many community members offered to volunteer their time, skills, and
connections in support of a campaign.

A capital campaign often draws from a larger pool of leaders and managers than the day-to-day operation of a congregation. To ensure the success of a capital campaign and to foster corollary benefits beyond the completion of a campaign, the congregation may wish to institute training opportunities for new or emerging congregation leaders. This will help Waitsfield UCC in the short-, medium-, and long-term by creating a pipeline of enthusiastic, well-trained lay leadership.

- **Finances** – There is a significant agreement among interviewees that the finances of the parish are managed well. However, it is important to note any questions or concerns about finances must be addressed before a capital campaign launch. For congregations, financial concerns are more often related to communication issues than to actual financial problems. The congregation should ensure clear, concise, and transparent communication strategies are in place before the campaign launches.

- **Volunteers** – There was not disagreement among interviewees about the potential for the congregation to recruit, train, and retain volunteers for the capital campaign – and for the day-to-day operation of the church. The congregation will need to take steps to build the confidence and skills of volunteers who are likely recruits for leadership positions in the capital campaign.

- **Networks** – Partners was impressed not only with the individuals with whom we spoke, but with the personal and professional networks they bring to the table as well. There was nearly unanimous willingness on the part of interviewees to spread the word about Waitsfield UCC’s campaign. This bodes well for the capital campaign not only because of the potential dollars it brings into the campaign, but also other resources that could be identified through
these networks, including volunteers, steering committee members, and leadership with relevant expertise.

PERCEPTION

• **Symbol of the Town** – Congregation members and community leaders all commented on the church’s status in the town of Waitsfield, and for the Mad River Valley as a whole. It is an “icon of the Valley” noted one, while another commented “it is the look of the town, and it draws tourists.” Many spoke to the fact that the image of the church was used in local promotional materials for Sugarbush Resort and the local cable company, as well as on town government materials.

As such, all those interviewed were in support of ensuring the building would remain strong into the future. The majority of interviewees understood the balance between preserving the physical structure, the need for a vital, healthy congregation, and the use of the building (and land) for community-oriented activities.

• **A Community Church** – Among members and non-members alike, the consensus was that Waitsfield UCC is, and is known as, a community church – a congregation of and for the region. The Rev. McHugh’s interfaith work and Waitsfield UCC’s monthly community dinners were cited as evidence of this, and the feeling of community is strong enough among congregants and community members that several interviewees commented positively about the concept of the church re-naming itself as the “Waitsfield Meeting House.”

  o **General meeting/gathering**
    The church social hall and kitchen and, to a lesser extent, its sanctuary space have been open to a variety of community-oriented, non-religious activities, events, and ongoing programs. Some of these types of
events include concerts, art exhibits, lectures, hosting scouts, community suppers, food drives, and other activities.

- **Community Dinner**
  One of Waitsfield UCC’s great recent successes is in instituting the monthly community dinners. This event, which increased in number of attendees over the past year, to an average of 75, brings together a range of church and community members from various walks of life and, as such, goes well beyond a more typical church feeding program for the needy in terms of building community. Those who had attended either frequently or occasionally spoke positively of the experience: “We like connecting to new people there,” noted one couple. And those who had never attended also had heard “through the grapevine” many good things about the suppers, though some did not know if their own peer group would be present and were reluctant to attend as a result. The dinner is Waitsfield UCC’s signature community-oriented activity and indicative of how using its space to host an activity can help create or cement the concept of the church as the “community meeting house.”

- **Funerals**
  Waitsfield UCC is the de facto church for funerals in Waitsfield, including many for non-congregation members. While this fact can be taken for granted, it should be emphasized that the congregation provides this resource as part of its general mission, and it is unique in town for having this facility and function.

- **Arts**
  The church sanctuary has been used as an arts venue, hosting several musical performances and, more recently, an exhibit of paintings by a noted Vermont artist. As such, the congregation has contributed to the cultural richness of the Valley. Most all of the interviewees were aware
of this role and thought that it could continue, and even increase, in the future.

A few people, mostly members, discussed the possibility of removing at least a few pews and shift the location of the piano to better accommodate musical performances and to enhance communication between the music director and choir during regular worship services.

• Congregational Character

  ○ Clergy
  All interviewees felt that Rev. McHugh is a well-respected, strong leader, and one interviewee noted she was the “most spiritually honest minister we’ve had here.” Interviewees were exceptionally confident in her ministerial capabilities, citing her steady pastoral style and ability to listen well and contextualize what she’s heard from you.

  ○ Demographics
  Several interviewees discussed the demographics of the congregation. There is a perception the church has too high a proportion of older adults and seniors as compared to younger families. “I am concerned that there are not enough young people,” said more than one person. Certainly, attracting younger singles and families is important to the sustainability of the congregation, and the church should continue finding ways to make them feel welcome. Some members interviewed expressed reticence toward teenagers participating in programming in the building. This is a dynamic the congregation needs to address.
O **Optimism & Openness**

While most interviewees expressed concerns about specifics, there was a consistent tone of optimism during the course of the interview process. Partners perceives a *realistic* optimism – a sense that members and community stakeholders understand the challenges ahead but are committed to moving forward because they see and believe in the value of the church. “We are not stagnant,” one person noted. There was also pragmatism with regards to the limited capacity of the congregation and the need to seek outside support to execute next steps.

**GIFT POTENTIAL**

The key component of any feasibility study is the analysis of the gift potential of church members and friends of the congregation. A generally accepted standard for determining the feasibility of a campaign goal is to identify a lead gift (or gifts) in the range of 10-20% of the overall goal.

Among those asked from the congregation and the community, there was a willingness to give. During the course of the feasibility study interview, almost every interviewee, when asked if he or she would give to the campaign, affirmed support for the congregation according to their means. Only four interviews declined to commit to a financial gift at this time, but all were supportive of helping in other ways, and were open to being presented with the opportunity to give in the future. Commitment to give at a high level is rare – and profoundly important. The church’s capacity to make successful appeals to major donors and to organizations, businesses, and foundations will increase significantly when gift solicitors from Waitsfield UCC can cite this type of commitment from the congregation.

There is an adequate financial capacity within the congregation to give to the capital
campaign. While there is very significant support for and interest in carrying out the proposed work, no members of the congregation came forward with a financial capacity to give at a six-figure level. However, Partners’ identified a handful of gifts at the low to mid five-figure level. We also identified community members, business leaders, and others who would make important financial commitments to the campaign and believe there are more potential individual and institutional sources at the regional and even state level that could be effectively approached for a contribution.

**Based on the gift potential identified, Partners would recommend a capital campaign with a goal of $375,000. This campaign would be what we define as a “grass-roots” or canvassing campaign – it would involve a team of volunteers trained and comfortable with approaching individuals, families, and institutions for gifts. We advise the campaign to take place over a pledging period of three years.**

A potential capital campaign infrastructure is discussed below. This infrastructure would be set up to:

- Conduct outreach in the community to attract non-member donors
- Coordinate research and relationship-building with its diaspora (former members, descendants of members, individuals and families with nostalgic ties to the congregation and/or building, etc.)
- Steward current donors and provide education about the value of investing in the capital campaign
- Investigate sponsorships and other financial support from local businesses and government who may be reticent to give financially to the campaign, but would be open to participation in other forms
- Research grant opportunities to identify private family foundations or community foundations who would give in support of the capital campaign or
It is important to remember that community-wide campaigns are usually longer, more complicated, and more labor-intensive than strictly internal capital campaigns (those for congregation members only). That said, we believe these campaigns are the right fit for congregations in Waitsfield UCC’s position. A grass-roots campaign will help build new relationships in the community. As members and campaign volunteers fan out in and around Waitsfield to get the word out about the campaign, there might be a corollary benefit: not only are new donors discovered, new members are as well.

To succeed, the church must begin laying the groundwork today and building and stewarding the network of stakeholders and donors. Fortunately, the work of the capital campaign is embedded in the long-term plan for the congregation’s future: increasing the network of community stakeholders. The work that goes into a grass-roots campaign is imperative to the future of the congregation, resulting in the financial reward of a successful fundraising effort while being part and parcel of the long-term planning and visioning for Waitsfield UCC.
OVERVIEW

We divide our recommendations in three sections: Laying the Groundwork (for a Capital Campaign); Creating a Positive Environment for Success; and Strengthening the Congregation. While only the first section technically relates to the issue of raising capital funds, all three are ultimately interrelated and helpful to the long-term sustainability and growth of a congregation. In our experience, presenting some of the broader suggestions can help a church better connect the discreet tasks of a capital campaign to the larger dreams and goals of the congregation.

LAYING THE GROUNDWORK

Build organizational infrastructure

The congregation should begin to build the internal infrastructure necessary to implement a successful capital campaign.

A key strategy for addressing the need for increased capacity, particularly in the areas of finances and
management, is to recruit a **capital campaign steering committee**. The committee should have 10-20 members, and it will work with the congregation and the *congregation’s capital campaign consultant* to:

- Finalize the project scope for the campaign.
- Help recruit campaign volunteers – those involved with the task areas outlined below, those who will serve as solicitors of gifts, and those who will take on other roles within the campaign.
- Oversee the work related to the case statement writing and communications planning – researching, drafting, and designing the campaign case statement and developing the campaign message and outreach and communications strategies.
- Identify, cultivate, and leverage relationships with neighbors, local organizations, and businesses.
- Oversee the work of connecting to the “diaspora” -- identifying, cultivating, and leveraging relationships with past members, descendants of past members, and other individuals with historic ties to Waitsfield UCC.
- Oversee the work of grantsmanship – identifying regional and statewide foundations that could provide funding to the campaign.
- Coordinate the process of donor rating. This process entails: (1) reviewing current and potential donors, (2) evaluating and estimating the capacity of each to give to the campaign, (3) prioritizing these potential donors by creating a schedule of asks, and (4) recruiting and coordinating solicitor(s) for each ask. An important first step for this process is research and selection of a donor management system, which will be a vital resource both for tracking gifts and providing oversight of the research and solicitation project.
- Draft, release, and publicize an RFP for an architect, review proposals, select a project architect, and work with the architect to establish a
timeline and plan for project sequencing.

It is likely the church will need to spend between three and six months improving its internal infrastructure and capacity before it is ready to launch the capital campaign. Nevertheless, the congregation should begin to recruit steering committee members immediately.

The committee can be recruited with the understanding members will play a role in the preparation phase for the campaign. Therefore, representatives from several stakeholder groups will be important to recruit to the committee:

- The congregation itself: 5-7 church members and/or staff (clergy will serve on the committee ex-officio)
- Town/Valley civic leaders who do not attend Waitsfield UCC
- Local business owners
- Local or state elected officials and/or their staffers
- Local arts, food, and environmental organizational staff

While it is critical for several stakeholder groups to be represented, it is also helpful that the committees include the relevant expertise to prepare for, launch, and lead the campaign. For example, the committee could include:

- An attorney, who can review contracts, space sharing agreements, etc.
- A banker, who can oversee the creation of a separate capital campaign account and ensure that campaign funds are kept separate from church’s general fund
- A CPA, or individual with experience in finances and bookkeeping

The right mix of expertise and experience on the steering committee is critical to the success of the campaign and to the future of the congregation. The
decisions and leadership of the committee will be a major factor in the long-term sustainability of the church.

**Invest in more detailed architectural planning.**
Leveraging its existing network and relationship with a local architect, the congregation should invest in pricing the projects identified as priorities. This approach will enable the congregation to go into the campaign with specifics while being able to frame expectations about future expenses.

**Tell Waitsfield UCC’s unique stories about faith**
One of the questions we often asked interviewees is, “How did you come to Waitsfield UCC?” We were fascinated by the diversity of answers to this question that we found at the congregation. The church must realize that these stories are an asset to the congregation – they are powerful, endearing, and relatable. These stories help paint a picture of who the church is – and it is a picture that could potentially attract new members, visitors, and donors. As part of the early phase of the capital campaign, Partners would recommend facilitating a process – either an in-person workshop or an email survey – to allow for these stories to be shared and recorded.

**CREATING A POSITIVE ENVIRONMENT**

**Inspire confidence in the financial leadership of the congregation**
Rev. McHugh and the Council have to begin now to inspire confidence from the congregation and community partners as it relates to their financial leadership, including more frequent communication about the finances of the congregation. One way to implement this recommendation will be to provide educational opportunities for members and interested outsiders to learn more about how finances work at the church, hammering home the message of the need for and urgency of a capital campaign.
Plan for communications

It is important that Waitsfield UCC create a communications plan to consistently keep all constituencies within and around the congregation informed about the church’s activities, ministries, events, and fundraising initiatives.

Before Waitsfield UCC would be ready to publicly launch a capital campaign, it should consider:

- Creating a communications team charged with developing a comprehensive communications plan for the entire congregation
- Recruiting chair(s) with strong leadership and project management skills and interest
- Recruiting additional members who have expertise in communications, social media, and/or can represent different constituencies – the team should have a clear set of expectations and reporting relationships to the congregation board/steering committee
- Oversee the development of a social media strategy for the church in general and the capital campaign specifically

It is vital to the success of this task force to ensure communication does not center exclusively on fundraising activities and capital projects. It is, indeed, a priority for members to have more information related to these topics. It is equally important, however, to keep members, new partners, and potential partners aware of ministries, programs, events, lectures, and other initiatives at or around the congregation.

Explore Opportunities to Expand Space Sharing

Most interviewees recognized the fact Waitsfield UCC already opened its space for a variety of community programs/events, and it could do more of this
given the potential need for more general use space in the town. One interviewee noted, “There is a need for more space.” Another commented on the cramped space their organization currently occupies.

Still, we should note two cautionary points in this regard. One, as many have said, Waitsfield UCC’s space resources still are underutilized for much of the week. This leaves room for significant growth, and it could be perceived the church has not been active enough in opening its space. There is also a related and potentially contradictory theme that emerged in conversations with many community leaders who were not church members: WUCC should be very careful not to compete with other venues that might also have flexible space open for community programming. Such spaces mentioned by interviewees include the Joslin Memorial Library, The General Wait House, Inn at Round Barn, the proposed Town office building, the Roman Catholic Church, the school, and Big Picture Theater.

Even with these others venues, most thought the case could be made for use of space of a particular type, size, and purpose being made available at Waitsfield UCC but cautioned against taking this point for granted. Thus, the case for support would indicate WUCC has a variety of flexible spaces that have been used for community events, that the church desires to increase the use and usability of these spaces for needed community activities, and is doing so in a way that fills a need or creates a specific niche rather than replicating something that already exists.

Possible Site for Youth/Teen activity
We asked people to give their thoughts and opinions on the concept of using space at the church for activities for older youth/teens. Many people mentioned, or were aware of, efforts (by Brian Degan) to create such a center. In this regard there was general, though not universal, agreement, that such a place would be useful for Waitsfield. “I do think there’s a need for
afterschool space,” noted one interviewee parent.

However, people were in greater disagreement about whether the church would be an appropriate place to house a teen center (or at least some after-school programming for this age group). The questions, which did rise to the level of strong objections, centered on two aspects: 1) the type of physical space that would be required for such a program and 2) the concept from youth/parents perspective of such a program being housed in a church – any church. Given the range of opinions and perceptions around this issue, we suggest a more intentional information gathering process be conducted, with the possibility of a test or trial run of the concept.

**STRENGTHENING THE CONGREGATION**

**Expand planned giving**

Planned giving is important for every congregation, and it should be of paramount importance for Waitsfield UCC. Often, church members are “house rich and cash poor,” and this has significant implications for a capital campaign. The corollary benefit of this dynamic is that, for members who do own property, there is an opportunity to explore whether planned giving is the right fit. While not directly tied to the capital campaign goal or results, the congregation should work with the denominational leadership to identify a best way forward for developing and implementing a robust approach to planned giving that will help the long-term sustainability of the congregation.

**Bridge generational gaps**

Having a wide range of ages represented within the congregation is an asset, but the congregation must take steps to bridge the gaps among some of these groups. The campaign can be an opportunity to do this. For example, younger, tech savvy families could conduct interviews with older members of the congregation and post video of these interviews to Waitsfield UCC’s social
media website. Older adults and seniors could host storytelling for young children. The congregation will want to incorporate planning on this issue into the early phases of the capital campaign.

Create a pipeline of lay leadership

Waitsfield UCC has strong and effective lay leaders. However, large burdens of work often fall into the laps of a small group of people. In the short-term, a capital campaign will require a significant network of volunteers working on committees and task forces. In the long-term, the church will need future generations of lay leaders. As a result, an informal apprenticeship program for future leaders could be created and launched to ensure there is a pipeline of individuals willing and able to take on new responsibilities at Waitsfield UCC.

Reconnect with the diaspora

The church must also make efforts to reconnect with its “diaspora.” Former members of the church, descendants of members, couples that were married in the church, etc. can be an important donor pool to cultivate during the capital campaign.

It is important for any congregation to remain connected to its heritage and its diaspora, but it is particularly important for any congregation approaching a capital campaign to do so – and Waitsfield UCC is no exception. Currently, there is no documentation about the diaspora. Work must commence to sift through existing records and conduct independent research to try to reconnect with individuals and families with historic ties to the congregation. Several interviewees mentioned individuals or families with whom they were still in touch but who had moved out of Vermont that they thought would be interested in the campaign.
Develop a case statement

In the immediate term, the Case Statement team (2-3 people) should be formed with a mandate to augment and complete the draft case that has been developed. A case statement is a five to 10 page document the church will use to help persuade potential supporters to invest in the congregation. The statement presents the reasons why an individual, foundation, corporation, or government entity would want to give to a historic sacred place based on its heritage, public value, plans for building repairs and enhancement, and its vision for the future.

The development of a case statement involves three phases:

(1) Research: A case statement must tell a compelling story about the history and heritage of a congregation, its building, and its community.

(2) Inventory of Current Conditions: A case statement must include a profile of the life of the congregation in the present. What is its mission? What are the most recent highlights in the life of the congregation? What services does the congregation provide to the community? How is the building integral to providing those services? What kind of building enhancements could increase the congregation’s impact? How would building restoration transform the way the community sees the congregation?

(3) Writing and Revising: Once the research is conducted, the case statement must be drafted, revised, and formatted for presentation to potential donors.

Just as the congregation’s heritage is a core component of its case statement, the church’s diaspora can become part of the donor base for the capital campaign. Two to three long-term members of the congregation can help to research and reconnect with potential donors from Waitsfield UCC diaspora,
including, but not limited to:

- Former members of the congregation who have moved away
- Individuals who were married, baptized, or confirmed in the church
- Individuals whose loved ones worshipped at the church – or whose loved ones were married, baptized, or confirmed in the church

Depending on the strength of the connection, these people and families can be asked to give to the campaign and be part of any early communications efforts (as detailed above).
Recruitment of volunteers for service on the steering committee and for helping with related tasks will be an opportunity to engage a diverse group of stakeholders in the future of the congregation. Individuals who are longtime members or supporters of the church will have a role to play, as will new members, council members, and others outside the congregation.

To help identify individuals with the necessary gifts and talents, Partners recommends the congregation host a half-day asset-mapping retreat during the early stages of the capital campaign. People from within the congregation and from the wider community can help with the areas listed below. Please note that you may not need the full number or type listed, and that some people may fill more than one role.

- Case Statement
  - An individual with research skills and/or interest in the history of the congregation and the community
• A member of the council, who can serve as a voice for the congregation’s current mission, vision, and values
• A longtime member of the congregation, who can serve as an authority on the church’s recent history
• A strong writer

• Communications
  • An individual with a marketing, public relations, or communications background
  • An individual with graphic design experience
  • An individual with social media experience
  • A strong writer

• Community
  • A representative of the local business community (ideally from the Chamber of Commerce)
  • 1-3 representatives of the arts, food, and peace communities in Waitsfield
  • A member of the council, who can serve as a voice for the congregation’s mission, vision, and values to ensure potential space-sharing partners are in alignment with these values
  • An individual with a marketing, public relations, or communications background
  • An attorney, who can review space-sharing agreements

• Diaspora
  • 2-3 longtime members of the congregation, who can help identify individuals and/or families to whom the congregation should reach out
  • A member of the council, who has access to church records and archives to find names, addresses, and contact information for the diaspora
- An individual with research skills to find members of the diaspora who may not otherwise be identified

- **RFP**
  - An architect
  - An engineer and/or an individual with experience in construction management
  - An individual with a finance background, to help vet the financial side of the proposals

- **Individual Donor**
  - A longtime member of the congregation, who can help identify individuals and/or families within the congregation who can serve as donors
  - A member of the council, who has access to church records and archives to find names, addresses, and contact information for the internal donors
  - A local philanthropist, who has ties to and relationships with wealthy members of the community
  - An individual with research skills, who will be responsible for finding records, data, and other biographical information critical to making projections about capacity to give

- **Development**
  - A trustee and/or program officer at a local foundation
  - An individual with grant writing experience
  - A member of the council, who can serve as a voice for the congregation’s current mission, vision, and values to ensure grants pursued match the priorities of the congregation
  - An individual with nonprofit and/or finance experience to review grant budgets and grant reports
o An individual with research skills to identify and vet potential foundation prospects
PROPOSED CAMPAIGN INFRASTRUCTURE

**Rev. Nancy McHugh & Capital Campaign Consultant**
- Works with congregation members and staff to identify and recruit committee members
- Provide oversight/management of steering committee, including establishing a campaign timeline and deadlines for deliverables
- Meet with individual donors and foundation program officers to solicit gifts

**Capital Campaign Steering Committee**
- Provide oversight/management of individual task forces
- Leverage strategic relationships to recruit new donors and stakeholders to the campaign

**Case Statement**
- Research into congregation/neighborhood history
- Identification of current conditions/mission of church
- Writing and revising document

**RFP**
- Develop Request for Proposals for facility upgrades
- Distribute RFP to relevant architects
- Review proposals and select an architect for the project

**Communications**
- Create campaign materials
- Develop a social media strategy
- Create an e-newsletter that updates members and donors about the church

**Individual Donor**
- Review current and potential donors
- Research their capacity to give
- Prioritize and sort donors into Pyramid of Gifts
- Match donors to gift solicitors based on his/her relationship to the church

**Community**
- Identify, cultivate, and leverage relationships in the community
- Increase space-sharing partnerships
- Welcome neighbors, commuters, etc. into church

**Diaspora**
- Identify, cultivate, and leverage relationships with past members, descendants of past members, and other individuals with historic ties to church

**Development**
- Identify, cultivate, and leverage relationships with local, state, and regional foundations
- Foundation research
- Meet with program officers
- Grant writing
- Grant reporting