

Planning Feasibility Study Executive Summary

The Anglican Diocese
of
Edmonton



INTRODUCTION

We are pleased to present this Planning Feasibility Study Final Report to the Anglican Diocese of Edmonton, outlining the details of *M & M International*'s findings and recommendations for a proposed financial campaign. The purpose of the Study was to test the ability of the diocese to raise \$7,500,000 through a financial campaign. By means of a series of personal face-to-face meetings, open forums and online surveys, *M & M International* personnel set out to assess the Case for Support, gauge the ability of the diocese to provide funds for the Case and attract leadership and volunteers for a potential financial stewardship initiative.

This executive summary report outlines the Planning Feasibility Study findings. It begins by illustrating the Study process, highlighting and identifying the key components which were critical to the process. Lastly, we present our recommendations to be considered by the Diocese prior to launching a fundraising initiative.

To review, the principal objectives of this Planning Feasibility Study were:

- To gauge the lay and clergy views on the image of the diocese.
- To define and assess the various strengths and weaknesses of the Diocese of Edmonton's Case for Support as it relates to a possible fundraising initiative.
- To assess the appeal of the proposed Case for Support with those closest to the Diocese of Edmonton.
- To determine the level of financial contributions that could be expected from select individuals and others in and outside of the diocese that would be necessary to ensure a successful campaign.
- To identify a potential campaign chair(s), leaders and volunteers for committees
- To determine the most appropriate time for a financial initiative.
- To determine if the identified \$7,500,000 goal is realistic and attainable.

At *M & M International*, we are conscious of our responsibility in presenting this report and our recommendations. It is our goal to be both clear and concise in our statements and to present a report that will be of substantial value to the Diocese of Edmonton in developing its fundraising plans and objectives for a potential financial initiative.

This report represents *M & M International*'s professional judgment. Our experience provides the basis for our assessment of the advice and counsel solicited from the Planning Feasibility Study

participants, and other key people who made contributions outside of the formal interviews.

The findings of the Study are attitudinal in nature and based on individual perceptions and opinions. Accordingly, counsel has attempted to illuminate the statistical findings with narrative explanations and insights. As a result, the efficacy of these observations lends a much greater degree of precision to the Study findings.

We have enjoyed this opportunity to participate in the development of the fundraising plans for the Diocese of Edmonton and to play a part in the work of the diocese. We would like to acknowledge the efforts and the assistance provided by the Planning Feasibility Study Working Group, Sarah Kemp, Margaret Marschall, Amanda McNabb and The Right Reverend Jane Alexander. We are also grateful to Margaret and others for scheduling the face-to-face interviews and Open Forums. Most importantly, we wish to thank all of the individuals who gave freely of their time to assist the diocese and us with this Study.

We look forward to being of service in the future and to helping you achieve your fundraising goals at the Anglican Diocese of Edmonton.

Yours in Christian Service,

Murray McCarthy
Consultant

Martha Asselin
Consultant

EXECUTIVE SUMMARY

M & M International was retained by Anglican Diocese of Edmonton and the Anglican Church of Canada to conduct a Planning Feasibility Study to investigate the support for a \$7,500,000 financial campaign to fund the following:

- Parish ministry needs.
- The educational and training needs of laity and clergy of the diocese.
- The Barnabas Initiative that includes the “priest in mission” program and reaching out to the homeless, new mothers and seniors.
- The establishment of Messy Church and other congregational development programs and outreach initiatives.
- Indigenous Ministry Initiative and the Standing Stones worship service.
- The Rural Ministry Initiative.
- The encouragement and support of new worshipping communities.
- National Church programs in support of Indigenous peoples, the Military Ordinariate, International Partnerships and expanding the work of the PWRDF.

Study Findings

The process used in this planning feasibility study was so comprehensive that it provided literally tens of thousands of bits of information – including statistical data as well as comments by parishioners and others across the diocese. The study tools employed, including consultations with groups, individual interviews, open forums and online surveys, provided a comprehensive and inclusive process unlike any other in Canada to date.

Image

The Anglican Diocese of Edmonton is perceived favourably by the vast majority of respondents. The diocese is seen to be well managed and in touch with issues of importance. Bishop Jane Alexander, on balance, is viewed as a strength in the diocese and was mentioned frequently as someone of integrity and a fine leader. More than eighty-two percent (82%) of respondents have a good or very good opinion of the diocese and, importantly, fewer than five (5%) percent had a poor opinion of the diocese. When asked what opinion others might have about the diocese, the results were less favourable. Respondents generally feel that others would not be as positive as they are about the diocese. However, the overall opinion is still very strong.

- Generally, people are very happy with the overall state of the diocese.

- Respondents know that the diocese is energetic and embarking on substantive initiatives; however, they would like more clarity in communication and opportunities to respond and participate.
- Respondents have a strong connection to their individual parishes, and the clergy have a strong bond with each other and their parishioners.
- The Bishop is highly regarded and a respected leader of the diocese.

Case for Support

In general, the content of the Case for Support was clearly understood by respondents in both the face-to-face interviews and by those who participated in the online survey. However, many viewed the Case for Support as a document that, while directional, lacked specifics and sufficient detail.

Respondents were careful to respond as accurately as possible to whether they supported the many elements of the Case. More than ninety-three (93%) percent of respondents were supportive or somewhat supportive of the initiatives in the case for support. More than eighty-four (84%) percent of participants identified local ministry and mission needs in their parish. The Rural Ministry Initiative received the highest level of support among respondents followed closely by Indigenous ministry and the Leaders in Mission component. The National church ministries found high support for the ministries to Indigenous peoples and expanding the work of PWRDF. The other elements received more modest support, and the details of that support will be highlighted in the body of this report.

The Study delivers a clear message as to what parishioners in the diocese are prepared to support financially. More than ninety (90%) percent of respondents in the face-to-face interviews expressed “POSITIVE” responses toward the Case for Support and therefore would be likely to support a campaign financially.

Leadership

In the current climate, leadership and volunteers for a campaign can be difficult to identify and engage. This is not a source for concern for the Anglican Diocese of Edmonton where support for participation in a leadership role (sixty-three (63%) percent excellent and good) shows that people are generally willing and ready to become involved. Greater than sixty-three (63%) percent of respondents also

indicated that they would consider a volunteer role in their parishes as ambassadors or visitors in a campaign situation.

Goal Attainability

Participants were generally optimistic about the attainability of a \$7.5 million goal, however, fewer than half (44.6%) felt that the goal was achievable. Participants suggested that people in the diocese generally have capacity to give. Respondents who did not believe that the goal was achievable felt that a goal between \$4 and \$5 million would be realistic.

Financial Support

A very high proportion, nearly ninety-one (91%) percent of all participants, would consider a financial gift to a campaign in the diocese. Eighty-three (83%) percent of participants disclosed an amount while nearly eight (8 %) percent of respondents in the face-to-face interviews were uncertain. The total value of potential gifts ranged from \$362,500 to \$705,947 or slightly more than \$6,839 on the low end as the average gift amount.

Level - Low	Level - High	# of responses	\$ Value High	\$ Value Low	% of responses
\$25,000	\$49,999	4	\$199,996.00	\$100,000	6.15%
\$10,000	\$24,999	10	\$249,990.00	\$100,000	15.38%
\$7,500	\$9,999	5	\$49,995.00	\$37,500	7.69%
\$5,000	\$7,499	18	\$134,982.00	\$90,000	27.69%
\$2,500	\$4,999	13	\$64,987.00	\$32,500	20.00%
\$1,000	\$2,499	2	\$4,998.00	\$2,000	3.08%
\$500	\$999	1	\$999.00	\$500	1.54%
		53	\$705,947.00	\$362,500	
		Average /gift	\$13,319.75	\$6,839.62	

There were only four (4) major gifts of \$25,000 or above identified in the study. Finally, greater than eighty-one percent (81%) of face-to-face participants were graded as likely to give or as probable givers to a campaign.

It needs to be noted that the potential for bequests from parishioners in their Will was high, with nearly thirty-four percent (34%) of those interviewed suggesting that they have already left a bequest to the church. An additional seventy three (73%) percent suggested that they would consider discussing a planned gift. The parishes and diocese stand to benefit the most from attracting these bequests with nearly seventy-four (74%) percent willing to leave their bequests with them.

Other

A number of other key factors were indicated, and participants were eager to offer opinions and suggestions that would support the successful implementation of a campaign. Complete transparency and increased communications efforts were seen as essential in the eventuality of a financial campaign, and there was general agreement that the Case for Support requires more specificity.

Recommendations

The following are recommendations that have been developed by the study team. We believe that the following recommendations, if well planned and executed, will have a positive impact on the overall success of a diocesan campaign:

Case for Support

- Develop a Clergy Day event to discuss the results in detail, the vision and plan for the parishes, diocese and national church, the role of diocesan leadership, the role of parishes and a financial review of the strategic initiatives undertaken to date.
- Gain approval of the clergy and the laity of the diocese to embark on a financial stewardship initiative.
- Evaluate the lower priority elements and determine whether they are fundable campaign priorities for the diocese.
- Refine and rewrite the Case to focus on the supportive elements as defined by the Study.
- Set a goal of no more than \$5,000,000 to be split with the parishes (50%), the diocese (40%) and the General Synod (10%).

Administration

- Send personal thank you letters to all study participants.
- Create a Financial Stewardship Initiative Working Group to begin the preparation and readiness tasks of the campaign.
- Prepare an RFP for a financial stewardship initiative.
- Develop a 5 year Fundraising Plan for the diocese that enables the diocese to continue initiatives over the next 10 years.

Communication

- Develop a Communication Plan to support a fundraising initiative and communicate the results of the Planning Feasibility Study diocese wide.
- Prepare for Diocesan Synod this fall by describing the process and the results of the Planning Feasibility Study.

STUDY OVERVIEW

Methodology

M & M International collaborated with members of the Diocese of Edmonton Planning Feasibility Study Committee and other key individuals to develop the Preliminary Case for Support and Letter of Invitation and to compile a list of potential interviewees representing a broad cross-section of the diocese, whose insight and support was deemed critical to the success of the proposed fundraising program. The Case for Support was prepared to give Study participants the needed background information about the diocesan plans. The intention of the Study was to invite a wide sampling of interviewees, representing the overall demographics of the diocese, to provide a broad cross-section of opinions about the Case. Individual invitation letters and the Case for Support were sent to approximately 100 potential interviewees. While we conducted 65 personal interviews, 74 opinions were solicited in total. (Please see the Appendix for a list of study participants). On a few occasions, parishioners chose not to respond to some of the questions asked. We also conducted 2 Open Forum sessions in the diocese on August 16th and 19th. At the open forums, respondents were offered the option to complete an online survey or a paper questionnaire. The on-line or Open Forum surveys garnered twenty five (25) completed responses.

Staff from the synod office called all interviewees to set-up a face-to-face interview appointment with Suzanne Lawson of General Synod, Theresa Murphy or Murray McCarthy of *M & M International*. Interviews were conducted over a two week period concluding in late August 2012.

Participants in the Study were asked to comment on issues relating to elements of a successful fundraising initiative and the Case for Support. These included:

- their personal perceptions of the diocese and their views of leadership
- their response to the diocesan plan to fund the many strategic initiatives of the current strategic plan

- their personal giving intentions in the proposed campaign
- their inclination to volunteer for a proposed campaign
- their thoughts on available leadership and specific individuals who could lead a potential campaign
- suggestions that would assure a successful capital campaign
- their opinions as to whether the diocese should launch a financial campaign
- their intention to leave a planned gift or a bequest to the parish, diocese or national church
- their desire to support specific programs and ministries of the Anglican Church of Canada financially.

Finally, the participants’ responses were recorded in a questionnaire and their comments were compiled in an online database after the interview was completed. Their responses and opinions serve as the basis for the series of recommendations included in this report.

At the conclusion of each interview an overall summary of interviewee responses was recorded based on their:

- attitude
- likelihood of volunteer participation
- leadership potential and
- level of financial support expressed.

M & M International Team

The following members from *M&M International* worked on this Study:

Murray McCarthy Partner Consultant	Study Supervision Preparation of preliminary Case for Support Review of Preliminary Case for Support Open Forum facilitation Study Interviews Analysis and development of recommendations Report review
Martha Asselin Partner Consultant	Case for Support Development and Preliminary Meetings Review of Preliminary Case for Support Analysis and development of recommendations Report preparation and review

Canon Ebert Hobbs Special Consultant	Final Report Review Strategic Counsel
Suzanne Lawson	General Synod Liaison Case for Support Development Materials Development Study Interviews

We gratefully acknowledge the members of the Planning Feasibility Study and the entire staff of the Diocesan Synod office and other participants for their guidance and support throughout the study process.