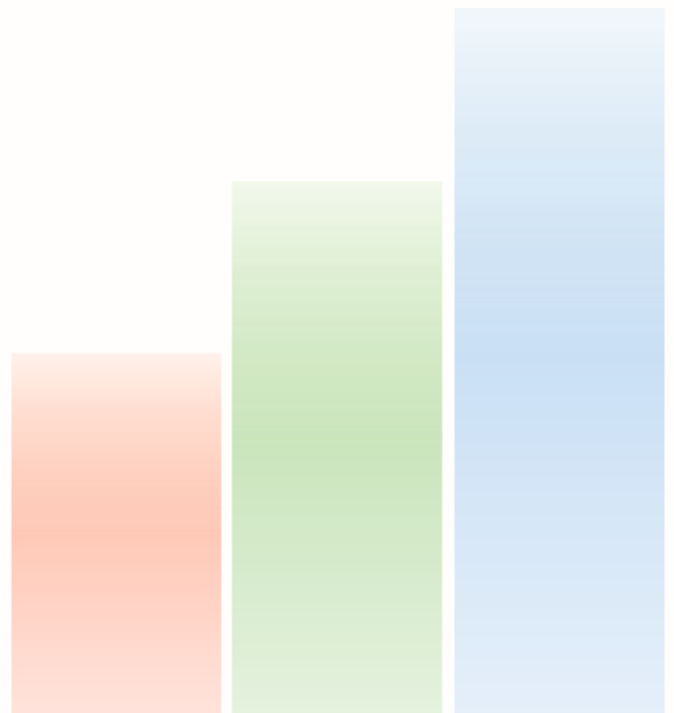




**ZION LUTHERAN**  
CHURCH

ZION LUTHERAN CHURCH  
**CAMPAIGN FEASIBILITY**

**PREPARED AND PRESENTED BY**  
MAXIMIZING EXCELLENCE, LLC.



## Introduction

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In June 2023, Maximizing Excellence, LLC (MaxEx) was contracted to conduct a feasibility study for Zion Lutheran Church (Zion). The study was purposed to better understand current and probable donor interest in and capacity to support a 2024 capital campaign.

### **The primary objectives of the study were to:**

- Determine project feasibility.
- Educate study participants about the project and its intended impact.
- Surface high-level themes, key motivators and hesitations, and any special discoveries.
- Lift names of possible volunteers and major donors.
- Develop recommendations based upon findings and feasibility best practices to position the campaign for success.

This report includes an executive summary, findings, special discoveries, and recommendations to consider as Zion prepares itself for campaign efforts.

## Process Overview

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MaxEx collaborated with pastoral and lay leadership and a Feasibility Study Steering Committee to develop the campaign case for support, provide input on interview questions, and prioritize invitations for individual interviews from Zion donor history data.

### **Data collection / Sample size:**

- Online congregation survey sent to 250 contacts. Paper surveys were also available during worship in October 2023. Exact response rate unknown.
- Thirty-seven in-person, video, or phone feasibility interviews with probable donors.
  - 18 couples.
  - 19 individuals.

### **Report development and presentation:**

- Compiled and analyzed interview data.
- Evaluated data with feasibility best practices.
- Determined project feasibility, lifting motivators and potential obstacles.
- Developed campaign recommendations based on findings.
- Presented findings to the Feasibility Study Steering Committee.

## Feasibility Study Best Practices

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A multi-faceted analysis of all data sets was compared to feasibility best practice categories. The following best practices were used to determine the feasibility of a Zion capital campaign.

**Case:** Vision is clear and compelling. Case connects with and resonates with participants. Ideal case for giving is understandable and compelling while increasing buy-in and influencing a financial investment.

**Leadership:** Project has volunteer leaders who are committed to the vision and have the capacity to support the project financially. Project leaders are known and well trusted. They are organized, with time to dedicate to the project.

**Readiness:** Includes internal readiness via staff, structure, previous experience, and available resources to conduct a campaign. Readiness also considers target audience's existing knowledge base, sense of need and urgency, as well as perceived feasibility of the proposed campaign goal.

**Potential Donors:** Philanthropic interest is widespread. Participants self-identify as potential donors and indicate major donor interest. Minimal local philanthropic competition.

## Feasibility Findings and Rationale: **Case for Support**

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### **EVALUATION OF NEED**

**The majority of participants said the need for the proposed work is apparent.**

- 89.1% of interviewees. *Just 2.7% of interviewees said the need is not apparent.*
- Survey respondents rated the need for building updates 4.1 on a scale of 1-5, with 5 being very necessary.

Study participants recognized the need for spaces that are more accessible and more welcoming. They spoke about first impressions for potential congregation members, welcoming spaces to host fellowship and traditional experiences for current members, room for Sunday School classes, and accessibility to all areas of the building regardless of physical capability, all being important to the growth and sustainability of Zion.

**Though there were questions about the ability to fund the project, the need is apparent.**

*Participant comments:*

- “We need updates, but I don’t know if we can financially support this.”
- “Once something gets built it will be utilized, but as far as the cost of the project, if we have to borrow any money, it will add up fast.”
- “How much money do we need to start and how much do we need to get a loan?”
- “Will trying to raise the money put us in a bind?”

**Project specifics were not clear to everyone. While knowing that the need for updates is apparent, interviewees had questions about logistics and full project scope necessity.**

*Participant comments:*

- “Will the choir loft be more accessible?”
- “If seating capacity in the new space is equal or greater than the current basement, then the elevator would kind of become obsolete.”
- “Will there be additional Sunday School classrooms?”
- “What’s the seating capacity of the new fellowship space?”
- “Will there be any renovations in the basement?”
- “Will this fix the water issues?”

## Feasibility Findings and Rationale: **Case for Support**

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### **EVALUATION OF MOTIVATION**

*Participants were asked to identify what motivates them most about the proposed capital campaign. Two key motivators surfaced:*

**1) 83.8% of interviewees are motivated by the potential impact that building updates will have on future growth and sustainability of Zion.**

*Participants emphasized the following priorities:*

- This project could help to attract and welcome new members while supporting the current congregation needs for accessibility.
- There is potential for further congregation and community involvement in church activities, specifically those that involve fellowship, with a more welcoming space.
- Youth programming will benefit from having additional dedicated building space.

*Participant comments:*

- “It would be good for the future of the congregation. The number of kids, youth, and young families have grown exponentially.”
- “If we want to grow and attract new and younger members, we need to update the church. We don’t really have a facility that is attractive to them.”
- “Will create a space for the youth.”

**2) 62.2% of interviewees are motivated by improvements to accessibility, with most respondents positively reacting to having a main level fellowship hall and updated elevator.**

*Participant comments:*

- “Accessibility for all.”
- “Almost every church you see is on the same level.”
- “We have to address the elevator issue. The basement and stairs are not completely safe.”
- “Main level fellowship hall accessibility.”

Survey respondents rated “accessibility to all areas of the church regardless of physical capabilities”, as the most important project investment, with a **4.5** on a scale of 1-5, with 5 being most important. Additionally, “the ability to provide a larger and welcoming space for youth” and “improved space for gatherings and events with a larger fellowship hall” were both rated as second highest priority, a **3.9** on a scale of 1-5.

## Feasibility Findings and Rationale: **Case for Support**

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### **EVALUATION OF COMPELLING INVESTMENT**

*Beyond the lens of personal evaluation, participants were asked how they thought the campaign has been received by the congregation. Participants indicated the following:*

**1) 35.1% of interviewees sense some hesitation as to how well the congregation has received the project and potential campaign.**

Similar to how participants responded to the evaluation of need, there is strong support in that the project is necessary, with equal hesitation as to whether sufficient funds will be able to be raised.

*Participant comments:*

- “People realize we need some change. The overall cost is mind boggling. It seems a challenge to reach the goal without getting a loan.”
- “It’s been so long since something has been done, and now we look at the \$1.8M and it’s scary. Everyone probably agrees that it’s necessary.”
- “Mixed feedback, it seems like a lot of money.”

**2) 24.3% of interviewees think the congregation has received the project and potential campaign well.**

*Participant comments:*

- “Everyone is ready for it and is excited, it’s just if they’ll buy into it or not.”
- “The majority of people think that we need upgrades. Most people think that we need more than just the elevator update.”
- “I’ve only heard two or three negative thoughts about it.”

**3) 21.6% of interviewees believe that increased project communication is needed.**

*Participant comments:*

- “Should be giving more updates.”
- “A lot of people are concerned about the money part of it. If they would explain more about how they are going to raise the money that would be great.”
- “It’s a little confusing with all the different stages and the process of this project.”

## Feasibility Findings and Rationale: **Case for Support**

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### **EVALUATION OF CASE PREPARATION**

Participants were asked to identify what is missing in the case and/or what Zion needs to be better prepared to address. Their comments sorted into two key areas:

#### **1) Clear understanding of scope of work.**

Participants have a strong sense of ownership in the building and are interested in knowing more about the scope of work planned. Comments were focused primarily on the following two areas:

- Use of Space:
  - Eight interview participants asked questions specific to Sunday School classroom location and size.
  - Six interview participants asked what the current basement fellowship hall space will be used for.
  - Four interview participants asked about fellowship hall capacity.
- Accessibility:
  - Four interview participants asked if this project would impact choir loft accessibility.
  - Lift System size, visual, and how it differs operationally.

*The full list of comments and questions can be found on page 34.*

#### **2) Project funding details.**

- Options available for giving.
  - “Are there opportunities for members to give their time to the building improvements?”
  - “Can they do a Temple Talk on the stock donations or gifts of grain? Monthly giving breakdown on a matrix would be helpful.”
  - “Add an element that emphasizes programming. We need to be careful to explain how this is important and essential to implement programming and community outreach.”
- Address plans and projected financials for ongoing financial needs.
  - “Address the funding issue. Is there a certain amount needed to commit to before moving forward which includes a mortgage?”
  - “How do we reach the ongoing needs of payments and the church?”
  - “There were times where they couldn’t meet Synod obligations, budget issues, repaying debt issues. We do not want to see that happen again.”

#### **Interviewees also suggested an overall strengthened communication of the project’s need.**

- Provide information to better understand the project cost breakdown.
- Explain more clearly how this project will accommodate a growing congregation.
- Continue to communicate through multiple channels to offer information and answer questions that the congregation may have about the project.

## Feasibility Findings and Rationale: Leadership

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### EVALUATION OF CONFIDENCE IN LEADERSHIP

Participants rated their confidence in leadership (pastoral and lay) and indicated what they thought were confidence boosters and areas of concern for campaign success.

#### **AVG: 4.2: Confidence in church leadership's ability to achieve the campaign goal.**

*(Scale of 1-5, with 5 being very confident)*

*Across interviews.*

Confidence boosters:

- Top response: Overall leadership.
  - "They are individuals that are well-versed and know what they are doing."
  - "They are very passionate about it and our church. The team is dedicated to the project."
  - "They've gotten this far and it's a lot farther than it's ever been, so there's some commitment there."
- Pastor Corey
  - "Pastor Corey is great and does a great job sharing information and being transparent."
  - "Pastor Corey is great and knows what he's doing."
- Confidence in leadership, while having reservations about fundraising to the level stated.
  - "A lot of great minds trying to figure it out. They have great intention, but there are factors they can't control."
  - "Full confidence in their ability to do what's possible, I just don't know if the families in the church are able to fund this."

#### **AVG: 4.6: Satisfaction with pastoral leadership.**

*(Scale of 1-5, with 5 being very satisfied)*

*From congregation survey*

### EVALUATION OF PEOPLE POWER

Participants also weighed in on various points of "People Power" in consideration of campaign feasibility.

#### **37.8% of participants expressed definite or potential interest in assuming volunteer leadership for the campaign.**

- Six participants expressed interest in serving on a leadership committee. Six participants said they would consider getting involved.
- Four participants expressed interest in making calls on behalf of the campaign. Five participants said they would consider making calls.
- It is assumed the current feasibility study committee will be part of the campaign's leadership team.



## Feasibility Findings and Rationale: **Readiness**

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### EVALUATION OF TARGET AUDIENCE READINESS

Participants provided insight into campaign readiness based on their familiarity with the project and perceived achievability of the campaign goal and gift matrix.

#### **Zion Congregation is tenured, involved, and overall satisfied with their experience.**

- 71.2% of interviewees have been involved in the church for 20+ years.
- 71.4% of survey respondents have attended for 20+ years. 51.2% reported being 61+ years of age.
- 67.8% of survey respondents indicated that they are actively engaged in the church, with 82.9% of respondents noting that they know the ways that they can get involved at Zion.
- Survey respondents indicate high satisfaction and connection to Zion. *Rating is based on a scale of 1-5, with 5 being very satisfied.*

Areas of Zion Church Experience	Overall Rating
Pastoral Leadership.	4.6
Zion Staff.	4.5
Opportunities to volunteer within the church.	4.3
Sunday Services.	4.3
Music Ministry.	4.2
Fellowship and study opportunities for children and youth.	4.1
Online worship.	4.1
Wednesday evening services.	4.1
Overall experience.	4.1
Community outreach and mission.	3.8
Fellowship and study opportunities for young adults.	3.7
Fellowship and study opportunities for adults.	3.6
Building/Facility.	3.5

#### **The majority of participants are familiar with the project.**

- 42.1% of interviewees are very familiar and 36.8% are somewhat familiar with the project.
- Survey respondents rated their understanding of the project 4.1 on a scale of 1-5, 5 being very well.
- Participants have heard about the project through church services, connection to church council and building committee members, and through social circles.

## Feasibility Findings and Rationale: **Readiness**

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### **EVALUATION OF TARGET AUDIENCE READINESS**

*Participants provided insight into campaign readiness based on their familiarity with the project and perceived achievability of the campaign goal and gift matrix.*

**Participants voiced mixed sentiment on whether the campaign goal of \$1.8M is achievable, with supporting comments indicating greater concern than confidence.**

- When asked, 44.7% of interviewees stated that they are confident the goal is achievable.
  - Those indicating confidence in achievability based their response on congregation perceived capacity to give.
    - “Absolutely if people buy-in and support it. We have some members who could possibly contribute a big chunk of the goal.”
    - “As long as older people decide to give.”
    - “If everyone is on board and invested.”
- 39.5% do not know if the goal is achievable.
  - Interviewees who responded with uncertainty in goal achievability focused on unfamiliarity with the congregation’s capacity to give. In addition, several voiced concern that if a portion of funds need to be financed, the ability to make those payments over time could be challenging.
    - “My biggest concern is whether we are actually able to raise this amount. Not aware of how many families can give a large amount of money. Seems like it’s going to be difficult to reach.”
    - “Depends on the long-term plan (a loan). They need to find a way to do this without tying down the congregation.”
- 15.8% of interviewees do not believe that the goal is achievable.
  - Participants who do not believe the goal is achievable voiced lack of confidence in the congregation’s capacity to give and concern due to previous fundraising efforts.
    - “Finding volunteers and raising the money will be challenging.”
    - “They’ve been doing this a while and haven’t raised nearly enough; they are going to have to fund the money in different ways.”
    - “I would look to alternative sources for funding.”

## Feasibility Findings and Rationale: **Readiness**

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### **EVALUATION OF TARGET AUDIENCE READINESS**

*Participants provided insight into campaign readiness based on their familiarity with the project and perceived achievability of the campaign goal and gift matrix.*

#### **Participants are not optimistic the gift levels as presented in the matrix are achievable.**

- 68.6% of interviewees are uncertain as to whether gifts presented in the matrix can be secured. Concern for securing gifts at these levels is driven primarily by two factors:
  - Confidence in church capacity.
  - Congregation desire to invest in the project.
- Interview participants questioned the achievability of securing gifts at the major gift levels, especially the largest gift levels of \$250,000 and \$500,000.
  - “Very concerned about the lead gifts. \$100,000 and below may be achievable.”
  - “The question is how quickly it can be done and where will the largest 2-3 gifts come from.”
  - “The top ones might be tough.”
- Interviewees also questioned the congregation’s desire to give at these levels to support this particular project.
  - “People could afford it, but I don’t know if it would actually happen.”
  - “There are people out there that have the capacity, but this campaign may not necessarily be in their giving plan.”
- For those who were confident in these gift levels being secured, this confidence comes from the belief that once people know what is needed, they will step up to support.

#### **Survey respondents, intended to indicate broader churchwide sentiment, vary in their readiness to support the project financially or to ask others to do so.**

- 67.6% indicated that they are somewhat interested or unsure as to whether they would support the project financially.
- 28.6% indicated high interest in supporting the project financially.
- 3.9% had no interest in supporting the project financially.

## Feasibility Findings and Rationale: **Readiness**

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### **EVALUATION OF TARGET AUDIENCE READINESS**

*Participants were asked if they personally support the plan set forth by Zion to pursue the proposed capital campaign and what challenges they anticipate the campaign might encounter.*

#### **Participants indicated strong support of Zion moving forward with the campaign.**

- 88.2% of interviewees support the plan despite the reported hesitations.

#### **Participants described challenges they anticipate Zion will have to overcome to position the campaign for success.**

- Lack of capacity: 76.6% of survey participants identified the ability to raise funds needed for the project as a potential challenge.
- Lack of enthusiasm: 31.2% of survey respondents identified lack of enthusiasm to invest in the project as a potential challenge.

#### **Participants were vocal in what they recommend Zion to consider as they embark on campaign planning and strategy.**

- Prioritize communication and information sharing. Be timely and transparent.
  - Who to communicate to: the full congregation, all potential giving levels.
  - How to communicate:
    - Continued churchwide updates during services.
    - Town Hall style meetings to more detailed information.
    - Building tours with indication of layout changes and building additions to help with better understanding of the full project scope.
  - What to communicate:
    - Greater detail in renderings and project blueprints.
    - Provide understanding of use for all building spaces and how this will benefit congregation members of all ages.
    - Fundraising plans with consideration to future financial sustainability.

## Feasibility Findings and Rationale: **Potential Donors**

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### EVALUATION OF GIFT MATRIX

*Interviewees were shown a gift matrix for the \$1.8 million campaign that specified three lead gifts, one at \$500,000 and two at \$250,000. The following points of analysis were determined from their expressed interest and capacity to give to the campaign:*

- \$485,500 or approximately 27% of the target goal of \$1.8M was identified during the study by individuals who anticipate supporting the campaign.
- A total of 37 gifts were identified. 83.8% of participants identified at what amount they might support the campaign. Six participants did not know at the time what level they might give.
- Three participants suggested local companies may be willing to donate in-kind work as subcontractors rather than a cash gift.
- Two interviewees indicated potential for larger gifts to be received through stocks donated, with reference to others who may give through the same method.
- The majority of interviewees are interested in giving \$5,000 or less.
- Participants brainstormed 17 individuals/couples they think would be passionate about the vision and interested in learning more about the campaign.

### EVALUATION OF THE POTENTIAL TO INFLUENCE GIVING

*Participants were asked if there were scenarios that could influence their gift size.*

**Most participants said opportunity does not exist to increase their anticipated level of support.** Therefore, it follows that the feasibility study matrix results indicate the maximum amount raised from the probable donor base.

**Participants identified two scenarios that would secure their anticipated level of support:**

1. Length of pledge – A three-year pledge option would help maximize giving.
2. Progression of the project –, there is potential for additional giving if fundraising is going well and the project is moving forward with a need for a final push to reach the goal.