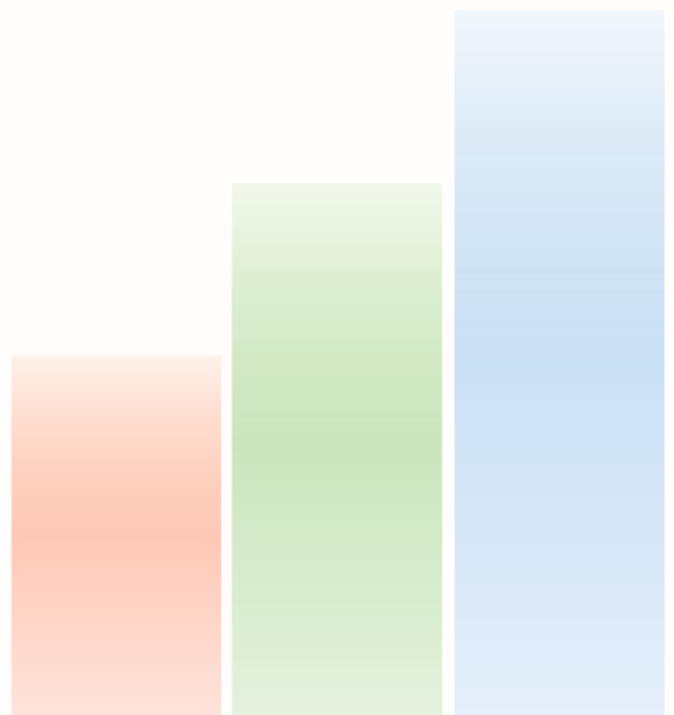




ZION LUTHERAN
CHURCH

ZION LUTHERAN CHURCH
CAMPAIGN FEASIBILITY

PREPARED AND PRESENTED BY
MAXIMIZING EXCELLENCE, LLC.



Campaign Feasibility Report 2024

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Introduction

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

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

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 Study Executive Summary

Feasibility Outcome

A comprehensive assessment of all feasibility data indicates Zion is not currently positioned to successfully pursue a capital campaign goal of \$1.8 million campaign in the next year.

It was found that Zion can be successful in raising capital funds at a lower amount of \$900,000 if the following are considered:

- Decrease fundraising campaign goal to \$900,000, with a potential stretch goal identified.
- Use of full building fund available dollars.
- Explore alternative strategies to fund the full needed amount after reviewing project scope of work.

If Zion moves forward with a campaign without following the recommendations related to messaging, fundraising readiness, and strategy, MaxEx predicts Zion would not raise more than \$750,000, not including use of the existing building fund dollars.

MaxEx has identified key insights and recommendations to better position Zion to be successful at reaching a targeted capital goal.

Key Insights

- Zion has an active and engaged congregation who believe in the importance of connection and value traditions held within the church.
 - Participants across all study activities – surveys and interviews – spoke highly of their experience at Zion. The majority are or have been involved in various committees and activities above and beyond attending service.
 - The connection between tradition, fellowship, and the importance of a welcoming church building is recognized.
 - Zion congregation members recognize the growth in membership in recent years and see an opportunity to provide space for future sustainability.
- The scope of work would meet a valid need. More in-depth details regarding several areas within the scope of work are desired.
 - Study participants recognize that the proposed scope of work for the capital campaign meets a valid need.
 - Comments indicate that some congregation members question the need for full scope of work and would like greater detail to understand value and long-term impact.
 - They are motivated by creating a space that is welcoming for existing and new members and the potential long-term impact on church sustainability.
 - Feasibility would increase if the full scope of work was more fully understood by the congregation.
 - Regardless of need, participants questions whether capacity for this level of project funding exists among members of Zion.

Feasibility Study Executive Summary

- Probable donors have mixed sentiment on whether the campaign goal of \$1.8 and corresponding gift levels presented in the matrix are achievable.
 - Confidence in reaching the campaign goal is based on the congregation's perceived vs. actual capacity to fund the campaign goal.
 - The goal could be more feasible if creative giving options were presented. Opportunity exists to educate congregation members on ways to give outside of cash donations, such as gifts of stock and "gifts of grain".
 - Members indicated interest in seeking additional alternatives to decrease project cost through in-kind gifts of time and talent, such as local subcontracting.

- Church leadership is an absolute strength.
 - Participants have great respect for and confidence in church council and the building committee. This group has provided energy and expertise, giving a sense of momentum not previously felt.
 - Pastor Corey is viewed as a progressive leader in terms of connection with current, former, and future congregation members. This is viewed as a strength both now and for the future of Zion.

- MaxEx identified two special discoveries that impact the feasibility of a successful future Zion capital campaign.
 - Major Gift Potential is unknown: Confidence in Zion's ability to fully fund the campaign might be based on major gift potential capacity vs. reality, and how passion for this project will motivate major giving.
 - Opportunity to Build Confidence in Commitment: The many attempts for building improvements in the past may be causing both confusion on project scope and doubt in follow-through to completion.

Feasibility Study Executive Summary: **Recommendations**

Messaging

MaxEx recommends creating a more comprehensive case for support by building off the feasibility study case and strengthening this by offering additional details that respond to what the congregation would like to better understand.

- Provide additional information within each of the following areas for scope of work: accessibility, fellowship hall, children and youth spaces, exterior improvements.
- Provide additional project financial information that offers insight into the following: scope of work details, cost comparison for phased project approach versus full project.

Communication

Participants clearly indicated a desire for greater communication to fully understand project details. Report feasibility findings to the congregation and thank them for their input.

- Incorporate feasibility findings on what congregation members want to know and how they prefer information to be presented.
- Host an official campaign launch event that presents campaign vision, scope of work, and dollars raised to date.
- Share consistent progress updates weekly throughout the ongoing planning, fundraising, and construction processes.
- Celebrate campaign and building milestones as the work progresses.
- Give Pastor Corey a prominent role in campaign communication activities.

Fundraising Readiness and Strategy

Although there are signs that the capacity to give at necessary levels might be present, the factors identified by MaxEx as having influenced overconfidence in fundraising should be carefully examined and incorporated into fundraising readiness measures and strategies.

- It is recommended to identify at least \$500,000 to be committed through gifts of \$50,000 or more, as lead donor giving, prior to launching the campaign.
- Decrease necessary funding.
- Consider alternative funding options.
- Proceed with using existing building fund dollars, with a communicated plan to replenish those funds over a short period of time.
- Revise campaign goal and corresponding gift matrix to reflect feasibility.
- Clearly indicate all options for giving and instruction on how to go about each.
- Leverage potential volunteer interest.
- Evaluate overall health of annual giving program.

Full recommendation details included on pages 21-24.

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

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**

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**

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**

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

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**

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**

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**

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**

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**

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.

Feasibility Findings and Rationale: Potential Donors

Capacity identified across interviews and focus groups:

\$485,500 = 27%* of Zion's proposed \$1.8M campaign goal

- Largest gift was identified by the potential donor's son, as a gift of stock, with a potential for \$100,000-\$200,000.

Zion Lutheran Church Gift Chart \$1,800,000 Goal				
PROSPECTS NEEDED	GIFTS NEEDED	GIFTS ID'd	GIFT RANGE	FEASIBILITY RESULTS
3	1		\$500,000	
6	2		\$250,000	\$-
6	2	1	\$100,000 <i>(includes 1 @ \$200,000)</i>	\$200,000
12	4		\$50,000	\$-
12	4	5	\$25,000 <i>(includes 1 @ \$30,000)</i>	\$130,000
18	6	2	\$15,000 <i>(includes 1 @ \$20,000)</i>	\$35,000
30	10	6	\$10,000	\$60,000
30	10	9	\$5,000 <i>(includes 1 @ \$7,000)</i>	\$47,000
28	14	3	\$2,500 <i>(includes 1 @ \$3,000)</i>	\$8,000
50	25	4	\$1,000 <i>(includes 1 @ \$2,000)</i>	\$5,000
many	many	1	under \$1,000	\$500
X	X	6	Do not know at this time	\$-
X	X		Do not plan to give	\$-
285+	96+	37		\$485,500

Context notes for understanding the gift chart:

- 3:1 prospect to gift ratio for major gifts.
- Gifts ID'd = gifts identified in feasibility study conversations.
- If a participant provided a potential gift range, feasibility study results reflect the upper limit of the range.

Feasibility Findings and Rationale: **Potential Donors**

Giving Estimates	
Low	High
\$100,000	\$200,000
\$20,000	\$30,000
\$25,000	\$25,000
\$20,000	\$25,000
\$15,000	\$25,000
\$10,000	\$25,000
\$20,000	\$20,000
\$10,000	\$15,000
\$10,000	\$10,000
\$5,000	\$10,000
\$5,000	\$10,000
\$5,000	\$10,000
\$5,000	\$10,000
\$5,000	\$10,000
\$6,500	\$7,000
\$5,000	\$5,000
\$5,000	\$5,000
\$5,000	\$5,000
\$2,500	\$5,000
\$2,500	\$5,000
\$2,500	\$5,000
\$1,000	\$5,000
\$1,000	\$5,000
\$3,000	\$3,000
\$2,500	\$2,500
\$2,500	\$2,500
\$1,000	\$2,000
\$1,000	\$1,000
\$1,000	\$1,000
\$1,000	\$1,000
\$500	\$500
Low Estimate Total	High Estimate Total
\$298,500	\$485,500

Feasibility Findings and Rationale: **Special Discoveries**

Major Gift Potential is Unknown

A common concern was voiced throughout the study in response to various questions: while the building updates are needed, are they financially feasible? Several individuals indicated they think there are members of the congregation who have the capacity to give at the major gift level (\$50,000+). However, only one participant indicated potential in a gift of that size, with this being an indication via the donor's son. Less than half of participants indicated a plan to give a gift of \$10,000 or more in the high range of their giving and less than 25% indicated a plan to give a gift of \$10,000 or more in the low range of giving. Confidence in Zion's ability to fully fund the campaign might be based on major gift perception vs. reality, and how passion for this project will motivate major giving.

Based on previous capital fundraising efforts, the likelihood of gifts at the major level is low, and likelihood of securing the needed number of gifts at a \$10,000+ level could be challenging.

It is recommended to identify at least \$500,000 to be committed through gifts of \$50,000 or more, as lead donor giving, prior to launching the campaign, with the additional \$400,000 of total campaign goal being raised among donors under \$50,000. Early commitment from major donors will instill greater confidence in the overall ability to achieve the project fundraising goal. These donors would need to be readily identifiable by church leadership.

Opportunity to Build Confidence in Commitment

Past failed attempts for fundraising and building improvement have created an underlying sense of doubt within members of the congregation. While supportive and willing to share feedback on the project, many noted that several versions of this project have been attempted without completion in the past. There is concern that completing this project will put a financial strain on the church for years to come.

Additionally, the many iterations of scope of work have created confusion regarding the details and benefits in the current scope of work. A strengthened case for support that provides a more detailed review of the scope of work and cost broken out for each area may address current questions. Including additional details regarding Zion's current financial growth, future growth projections, and dedication to project completion, may increase congregation buy-in.

Feasibility Informed **Recommendations**

Messaging

MaxEx recommends creating a more comprehensive case for support by building off the feasibility study case and strengthening this by offering additional details that respond to what the congregation would like to better understand.

RECOMMENDED ACTION STEPS:

- Provide additional information within each of the following areas for scope of work:
 - Accessibility:
 - Visual representation of lift system and possible review from a building that currently has this or a similar system in use.
 - Address exact location of lift system and where it will provide accessibility to.
 - Location and pitch of ramp entering into upper level.
 - Fellowship Hall:
 - Provide dimension comparison to current fellowship hall space.
 - Indicate potential capacity in comparison to current space.
 - Share detailed information regarding fellowship hall kitchen capabilities and use.
 - Children and Youth Spaces:
 - Consider determining plans for improved and/or increased youth and Sunday school space to increase motivation for completion.
 - Address which rooms will continue to be used for Sunday school and capacity increases with additional available space.
 - Exterior Improvements:
 - Address the positive impact that proposed updates will have on current water issues.
 - Provide a more detailed description of parking lot improvements budgeted within project funding.
- Provide additional project financial information that offers insight into the following:
 - Scope of work details:
 - A more comprehensive estimate of cost for each key area of the project.
 - Cost comparison for phased project approach versus full project:
 - Provide greater understanding as to the financial savings to make all building updates at one time, rather than breaking the project into smaller pieces.
 - Include potential cost additions, such as interest rate, should the full project require financing to be completed.

Feasibility Informed **Recommendations**

Communication

Participants clearly indicated a desire for greater communication to fully understand project details. They are eager to learn as much as they can about scope of work, campaign plans, timeline, and progress.

RECOMMENDED ACTION STEPS:

- Report feasibility findings to the congregation and thank them for their input.
 - Report these findings briefly during Sunday service, with a planned informational meeting scheduled to provide a deeper look at findings, plans, and a time to respond to questions.
 - Consider both an in-person option and video recording to provide an overview of findings. This video can be housed on Zion's website.
- Incorporate feasibility findings on what congregation members want to know and how they prefer information to be presented.
 - During informational meetings to share feasibility findings, address common questions/concerns and indicate plans for consistent communication as the project moves forward.
 - If possible, include Cleveringa construction as part of the informational meeting, to build trust and respond to questions specific to project scope.
 - Consider walking tours through portions of the building primarily impacted, including markers to show building size, hall width, location of ramp, location of lift, etc. This will give a more impactful visual for congregation members.
 - Create an FAQ document to be shared with congregation and housed on church website to address common questions and concerns.
- Host an official campaign launch event that presents campaign vision, scope of work, and dollars raised to date.
- Share consistent progress updates weekly throughout the ongoing planning, fundraising, and construction processes.
- Celebrate campaign and building milestones as the work progresses.
- Give Pastor Corey a prominent role in campaign communication activities.
 - Leverage established trust in Pastor Corey's connection to the congregation by including him when sharing future vision for each space and the future of Zion.
 - Instill excitement about the future of the congregation by highlighting the impact of growth in fellowship and opportunities for broadening the footprint Zion in the community.

Feasibility Informed **Recommendations**

Fundraising Readiness and Strategy

Recognizing the uncertain major gift potential, MaxEx cautions Zion to proceed under the assumption the proposed campaign will achieve successful results based on perceived capacity. Although there are signs that the capacity to give at necessary levels might be present, the factors identified by MaxEx as having influenced overconfidence in fundraising should be carefully examined and incorporated into fundraising readiness measures and strategies.

RECOMMENDED ACTION STEPS:

- It is recommended to identify at least \$500,000 to be committed through gifts of \$50,000 or more, as lead donor giving, prior to launching the campaign.
 - While several probable high-capacity donors were identified and interviewed through the feasibility study process, other probable donors indicated potential support through outside conversations with council and/or task force members while not wanting to be interviewed. It is crucial to the overall success of the campaign to have donors at these levels, both from a financial standpoint and to begin fundraising with momentum.
 - Church council members and task force committee members should meet to discuss those with high potential for major giving and identify a plan for outreach and gift commitment prior to launching the campaign.
 - Additionally, while not all at the major giving level, leadership groups within Zion should have a 100% participation in commitment to supporting the campaign financially. This will instill confidence and can be considered as part of the lead gift approach to campaign fundraising.
- Decrease necessary funding.
 - Explore the option for in-kind work through partnerships with local subcontractors. This will demonstrate initiative in responding to feedback and shows diligence in being fiscally responsible.
 - Consider an adjusted scope of work to include only those pieces of the project that are most impactful to Zion's mission and were indicated through the study as most important to congregation.
 - Ground level canopy entrance, specifically, was viewed by the majority of participants as a nice option while not a priority.
- Consider alternative funding options.
 - Project financing: A loan could be a legitimate consideration to fund necessary capital improvements. In a loan scenario, individuals might be encouraged to give more to avoid needing to take out a high interest loan.
 - Determine a plan for increased annual fundraising to shorten the necessary number of years for a construction loan.
- Proceed with using existing building fund dollars, with a communicated plan to replenish those funds over a short period of time.

Feasibility Informed **Recommendations**

- Revise campaign goal and corresponding gift matrix to reflect feasibility.
 - Set campaign goal at \$900,000 with a stretch goal that funds the full needed amount.
 - Communicate the benefits of a stretch goal being reached, based on decisions made on scope of work and/or alternative funding options.
 - Remove the top level \$500,000 target gift.
 - Prioritize reaching a \$500,000 goal through major/lead gift donors.
- Clearly indicate all options for giving and instruction on how to go about each.
 - Gifts of stock.
 - Gifts of grain.
 - Multiple year pledges.
- Leverage potential volunteer interest.
 - The twelve potential candidates for a future campaign leadership team could help diversify the reach and influence of the campaign ask strategy.
 - Utilize/leverage current committees. Identify members of church council and the building committee who are willing to serve on the campaign leadership team.
- Evaluate overall health of annual giving program.
 - Increase intentionality in annual giving through ongoing donor stewardship and impact communication.
 - Communication of goals and needs in a way that speaks to both the heart and the head.
 - What is needed to increase congregation and community impact.
 - What does this mean in terms of an increase in giving and how can everyone be part of this – communicate in percentage of giving increases.



ZION LUTHERAN CHURCH
CAMPAIGN FEASIBILITY

Appendices

Comprehensive Interview Analysis 26-56
Congregation Survey 57-70
Assessment of Campaign Timing71
Case for Support with Gift Matrix 72-81

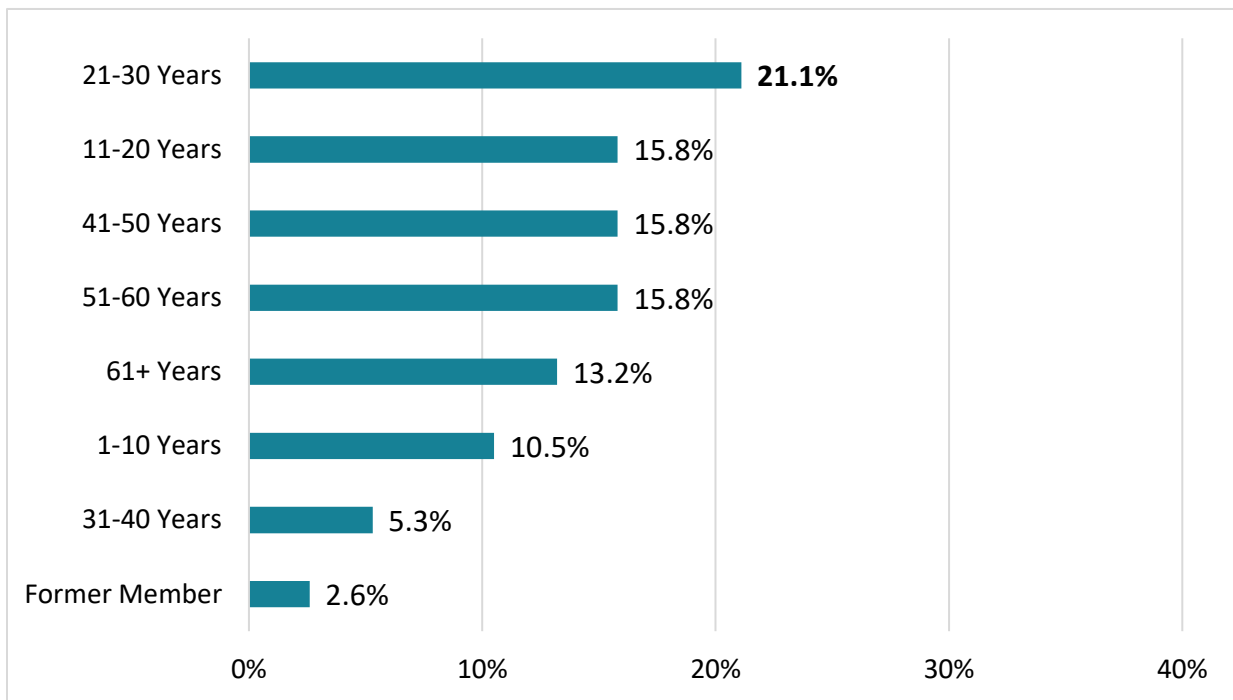
Comprehensive Feasibility Study Interview Analysis | n=37 interviews

Feasibility Study Interviewees

Adam Halverson
Allan & Ruth Hammer
Amy Bohl
Angela VanHolland
Bryce & Cherie Kindt
Chad Hanisch
Dan & Karla Paulson
Darlene Zweep
Dave & Sheila Schroeder
Dean & Cindy Olson
DeVona Engebretson
Diane Hintz
Gary & Kathy Winterton
Gary Hermanson
Geneva Skorr
Jackie & Larry Engebretson
Jeff & Susan Sylliaasen
Jessica Devine
Jim & Ethel Kurtz
Joey Rotert
John Brinkman
Johnny & Kristin Houg
Jordan & Ann Qualm
Judy Sievert
Justin VanDeberg
Kara Paulson
Karen Rzepecki
Karl & Jackie Liester
Lisa VanDeberg
Mark & Kathy Winter
Mark & Mary Beth Powell
Markell & Julie Gnad
Marty & Karen Leubke
Owen & Loise Wiese
Pattie Stensland
Reid & Ruth Christopherson
Ron Nelson
Sam Williamson

Q1: Name, length of membership, history w/ the church, ongoing connection, involvement, etc.

n=37



Couples interviewed: **18**

Individuals interviewed: **19**

Current Committee Involvement

- Council. (4)
- Youth Board. (2)
- Dream Team. (2)
- Alter Guild.
- Bible Study.
- Worship Board.
- Learning Board.
- Property Board.
- Financial Board.
- Outreach Board.
- Cemetery Board.
- Building Committee.
- Fellowship Committee.
- Coffee and Cookies Group.

Youth and Family Involvement

- Taught Sunday school. (5)
- Children/grandchildren grew up in the church. (3)
- Children were baptized/confirmed in the church. (2).
- Baptized in the church. (2)

Past Committee Involvement

- Previously Served on Council. (8)
- Previously served on committees. (2)

Generational Connections

- Grew up in the church. (4)
- Father was a Pastor at this Church. (3)

Music and Choir Involvement

- Current/previous choir member. (3)
- Led the children's choir.

Zion Traditions

- Quilting. (2)
- Lefse making.

Community Service and Outreach

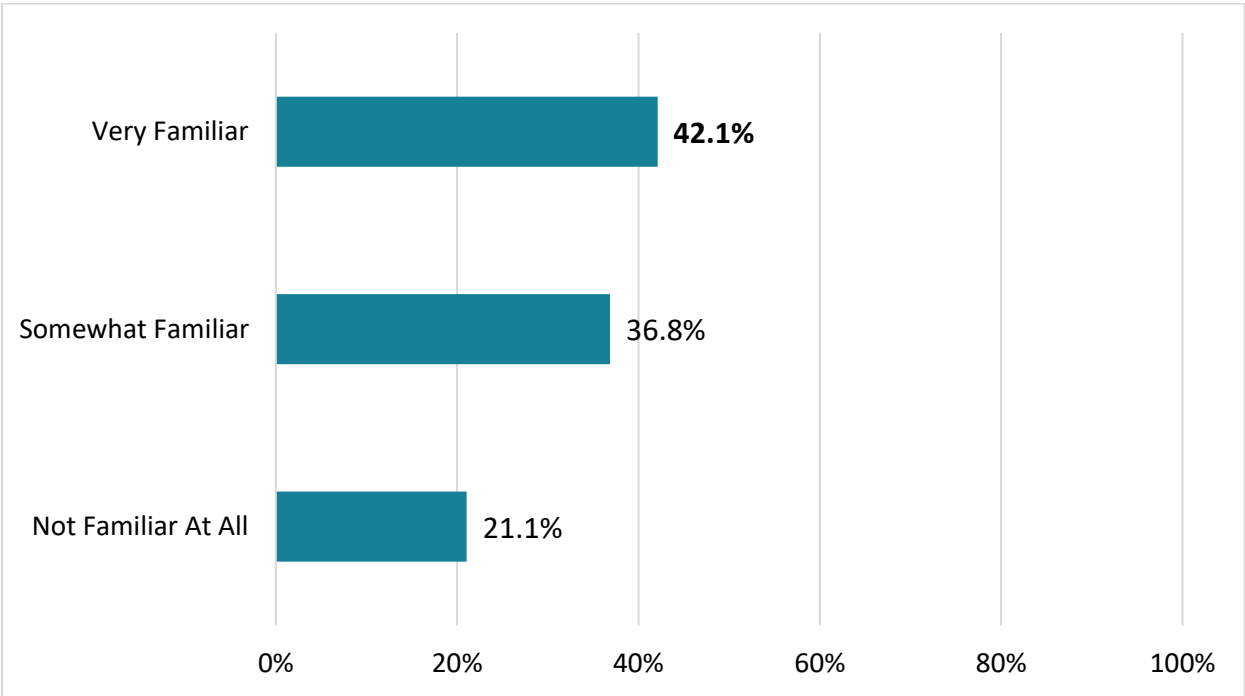
- Angel Tree.
- Food To You.

Staff Members

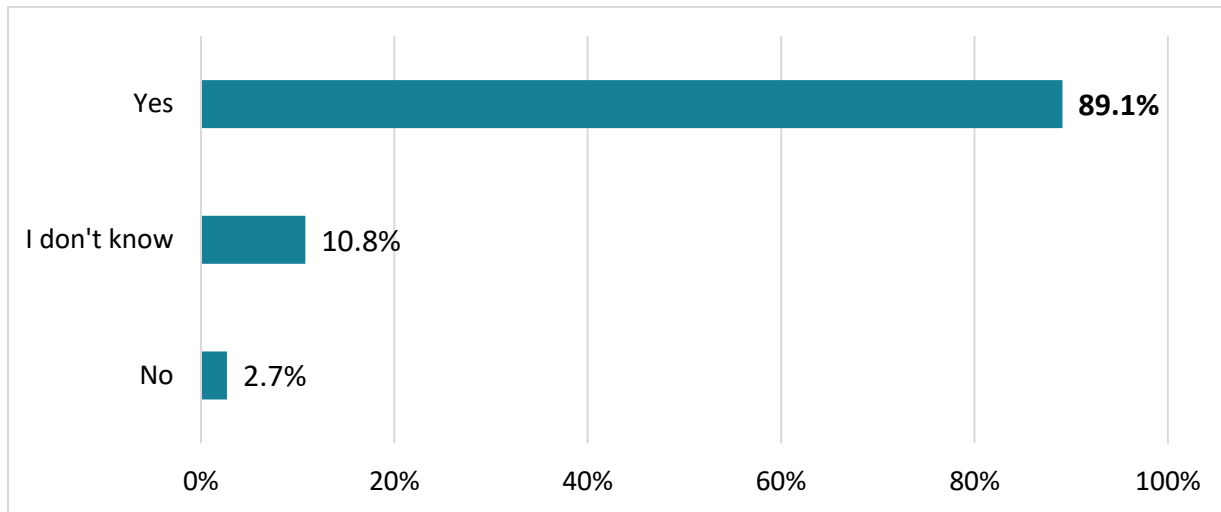
- Currently on staff.
- Previously on staff.

Q2: How familiar are you with the proposed capital project?

n=37



Q3: After hearing more about the project, is the need apparent to you for Zion to invest in building updates/additions? n=37



Comments in Support of Need

- Having the car port would be nice for the wind.
- The space isn't accessible for all and the elevator is too small.
- We need an elevator, room for kids, and necessities like the elevator.
- Need a more welcoming space for families and more gathering spaces.
- The upstairs rooms are too small for the kids to do Sunday school in. We need an updated space.
- We need a new elevator badly. The stairs are incredibly narrow and steep. It's the survival of the fittest.
- It's to the point where we have to eventually do something. We want our congregation to grow and we're starting to see a lot more young families with children.
- To grow and maintain youth involvement Zion needs better facilities. It should feel like a place the community has invested its time and resources in. A nicer building has the appeal of attracting younger members.

Concern About Funding

- If it's financially realistic I am in full support of it.
- We need updates, but I don't know if we can financially afford all of this.
- The need is there, I question realistically where the funds will come from.
- Not sure where the funds will be coming from. 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.
- The need for the elevator is definite. Not sure about the full update. It's a lot of cost for the population of the church. I don't know if the town can afford it or where all the money is coming from.

Concern About Project Specifics

- A car port is not necessary.
- The elevator is not necessary.
- We're on the fence about it. We don't think it's necessary, but it's a nice addition and will enhance things for the future.
- Doesn't see it to the degree the need is apparent. The congregation is growing, and it would be a good time to improve, but I don't see this project as having any more sanctuary space, Sunday School rooms, funeral space, or more space to accommodate a growing congregation.
- Not sure about the new fellowship hall. The elevator is very important to do, but once you get into something it's harder to go back and do more without spending more money.

Project Specifics

Accessibility

- Will the choir loft be more accessible? (4)
- Will there be a ramp instead of stairs from the sanctuary to the new space? (2)
- Are they going to raise the new building to make it one level from the sanctuary to the new space?

Lift System

- Will the lift system fit a casket? (2)
- What will the elevator be like?
- Do we need the elevator? Can't we just ramp every space that is a different height?
- If seating capacity in the new space is equal to or greater than the current basement, the elevator would kind of become obsolete.
- Is there a lift in the area where we could talk to the people to see how they like it/how it works? Have we seen a lift in operation in another building or could we get feedback about how others (who have a lift in their building) like this?

Sunday School Spaces

- Will there be additional Sunday school classrooms? (3)
- Where would Sunday school rooms go?
- What are the additions for room space? Sunday school rooms need to be updated/additional room. They're cramped which makes it difficult for the kids.
- Would they still use the downstairs area for Sunday school? What are they planning to use the upstairs area for if they will have Sunday school rooms downstairs? It would be a good idea to put together their thoughts on what Sunday school rooms would look like in the basement.

Fellowship Hall

- What's the seating capacity of the new fellowship space? (3)
- Will the new fellowship hall be big enough for all the current events we hold in the basement?
- Will the new fellowship hall kitchen be more of a catering kitchen rather than a preparing kitchen?
- Would it just be adding a bigger fellowship hall and then moving everything we do downstairs in the new space?

Basement

- What will the basement space be used for? (3)
- Will there be any renovations in the basement?

Covered Entrance

- Will the ground level canopy actually get used? What is the cost of that?
- Is the ground level canopy entrance really needed? It would be nice for handicapped people, but I don't know if it's needed. How much extra would that cost?

Water issues

- Would this fix the water issues?
- Will this resolve the water problem?

Other

- What will the building exterior be made of?
- What would the timeline on breaking ground and completion be?
- The previous plan was to help the old people to get down to the basement for coffee and funerals, what is this plan adding?

Plans for Funding

- Is it financially realistic?
- How much do they need to start the project?
- Will trying to raise the money put us in a bind?
- Are they doing donation through stocks and grain?
- To qualify for a loan do we have to have \$900,000 up front?
- How much money do we need to start and how much do we need to get a loan?
- Could we contribute to any reduction of costs with in-kind labor (work done by church members, or materials donated)?

Other

- Is the \$1.8 million a contract bid?

Clear Understanding of Plans and Renderings

Scope of Work Plans

- Address what is going to happen to the basement. (3)
- Plan for Sunday school rooms. (2)
- The logistics of the new fellowship hall. (2)
- How will the drainage issues be addressed? (2)
- Pros and cons of the lift.
- Where will adult bible study be held?
- What's happening to the parsonage?
- Will the parking lot be made bigger or updated?
- Are they taking advantage of the space in the church that they have already?
- The elevator and accessibility have to be the main topic. People don't realize you can't just quickly fix the elevator.
- Do we really need the covered entryway? It would be nice but if we wanted to cut costs that would be where we should take away from.
- Be clear about the rooms added and what the actual additions are going to be. Don't want everyone to think the other spaces are going to be abandoned.

Renderings

- Will the lift be casket sized?
- Write out what everything is on the printout of the building.
- Show the larger rendering of the building plans. Print it in more than one space.
- A lot of people can't take the rendering and get a vision from it. A walkthrough would be easier for people to understand.
- Would be helpful if everything that is ground level was one shade and everything downstairs or sanctuary level is a different shade. Would be helpful to distinguish where things are. Two different renderings of the different levels would be helpful.

Project Cost Breakdown

- It would be nice to see what each addition will cost.
- Have a breakdown of a phased approach to the project.

Project Funding Details

- What are they planning to do to raise the money? (2)
- Financing plans.
- How much money do we need before we hit the go button?
- Are they planning to fall back on the members for the money?
- How do we reach the ongoing needs of payment and the church?
- Make sure we have the ongoing support for the mortgage and the plan for that.
- Address the funding issue. Is there a certain amount that they need to commit to before moving forward which includes a mortgage?

Strengthened Communication of Project Need

- Keep communication open, keep telling the story.
- Is the church really growing enough to need all this space?
- Better explain how we are accommodating a growing congregation.
- Push the importance of the new area. The older members are mainly concerned about the elevator.
- What is the necessity of doing all of this? Is the church really growing enough to need all this space?
- What they are doing with the parsonage. Make it clear why the land that the parsonage sits on is more important than renting out the house.
- Feel like some people aren't going to look at the big picture. They just want to see the right now impact and not the down the road impact. Need to think of the future as well as the right now. The number looks huge right now, but we don't want to keep adding on.

Other:

- What's the next option if we can't do this project?
- Are there any grants ADA might provide for the stairs?
- The main concern is a lot of people just want the elevator, but now it's lumped into this whole project.
- Where does the gas pipeline come into the building? We'll have to reroute the pipeline if it is to the North.
- Construction is messy so I'm sure there will be grievances with parking and getting into the building. The more traditional members may have grievances with the change.

Q6: What do you see as the most compelling reason for the congregation to support the proposed capital campaign?

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Growth/sustainability of the church

Longevity

- Future growth and comfort.
- It will help us retain our members.
- Long-term use and expanded use of our church.
- To keep the church alive. The longevity of the church.
- The church is growing so there is a need, and you have to invest to grow.
- It would be good for the future of the congregation. The number of kids, youth, and young families have grown exponentially.
- It supports the needs of the church. A new church would feel more welcoming and breathe life into the congregation. Garretson is a growing community and Zion is unique in having a great pastor and so many kids and young families. If we don't have a welcoming church, we're going to lose the longevity of the congregation.

Attracting/Welcoming New Members

- Attracting new members to the church. (5)
- Desirability of church.
- We want to make sure the church is welcoming to present and future members.
- Having a main level fellowship will help keep people engaged and bring people into the church.
- 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.
- There's no way our current facilities are going to be able to sustain the church for years to come. The attractiveness of the facility is a lure for the youth.
- Continued growth of the congregation. Have a more welcoming church. An updated building gives the opportunity to take the ministry further through connections with the community.
- Can't keep the oldness of the church when our congregation is growing, and the needs of the community are changing. The more people you can get in the more they'll be involved and the more they'll give.
- If we want to keep up with progress and keep the young families coming, we've got to have the space to do it. When you look at these older churches that haven't been updated for years, they're dying churches. If you want people interested in the church, you have to keep up with a fresh modern feel.

Possibility of additional community/congregation involvement

- Involve the community more through more activities at the church.
- Get more people in the congregation involved, primarily the younger people.
- To have a better meeting space. The current fellowship hall feels like a hole.
- Potential for more men's meetings, church suppers, and amount of people involved in church.
- Having this set up on one floor might be able to pull people back to doing things at the church (funerals, weddings). You have to offer more than other people are offering and I really think this would bring people in.

Improvement to Youth Programming and Space

- Will create a space for the youth.
- Future commitment to our youth.
- We could have an even better youth program.
- Get the kids more active and involved in the church.
- Youth has picked up; Sunday school rooms are older and dated.
- We are very blessed in the number of children and young families that are a part of the congregation, we need to build that into the plan to sustain that engagement and membership.

Accessibility

- Main fellowship hall accessibility. (11)
- The elevator. (4)
- Accessibility for all. (4)
- Easier access to the sanctuary.
- Almost every church you see is on the same level.
- We need an elevator more than we need a new fellowship hall.
- We have to address the elevator issue. The basement and stairs are not completely safe.

Being Financially Responsible

- The current plan and the elevator plan are a similar amount.
- Net present value needs to be realized with doing it now. It's an inevitability. We need to do this eventually.
- By just doing the elevator we aren't fixing the problem, and they will have to eventually do the entire project.
- The basement is not ideal and has problems that need to be addressed and this is the best option. Adding a new space is a more responsible option.

Other

- Having better facilities.
- Private space for Pastor.
- We haven't updated in forever.
- Updated space and having a nice building.
- Ongoing water problems in the basement.
- To live like Jesus and serve our community.
- More natural light upstairs. Inviting/warmth feel.
- Something needs to be done and it will help everybody.
- Functionality. We are crunched for space on Sunday mornings.
- There are cosmetic things that need to happen to make it a better place.
- There are repairs that need to be done - water issues, elevator is shot, and the building needs updates.
- The church is a great priority. When you have a great church life going it's great to jump on that to improve it.
- Churches want to expand their membership and make it more appealing for young people. I don't think we're going to attract enough people for this.

Q7: How do you think that this campaign has been received by the congregation?

n=37

Sense Some Hesitation

- Was surprised how fast the vote passed.
- They maybe aren't sure what's going on.
- Mixed feedback, it seems like a lot of money.
- I don't know if we have enough people bought into it.
- The younger members are fine, the older seem a little skeptical.
- Those that are really enthused are in the minority, although the vote was positive.
- Some are really for it. Others have a concern about how they are going to afford it.
- In a skeptical fashion. Lots of people feel like it's expensive or that everything's fine and we've been fine without it.
- 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 \$1.8 million and it's scary. Everyone probably agrees that it's necessary.
- We have been sitting and have done nothing to accommodate the growth of the congregation. We'll figure it out, people need to have a little faith.
- Have heard all sides. There have been some who were opposed who are now promoting it. Still going to be a mixture of those for it and against it. Maybe the older people will be more conservative.
- For the older members they mainly want an elevator, not so sure on the extra "fancy" stuff. We're concerned about the amount of money needed. The older people are doing the most contributing in terms of money. Without the contribution of the younger families, we don't believe we'll reach the goal.

Well Comments

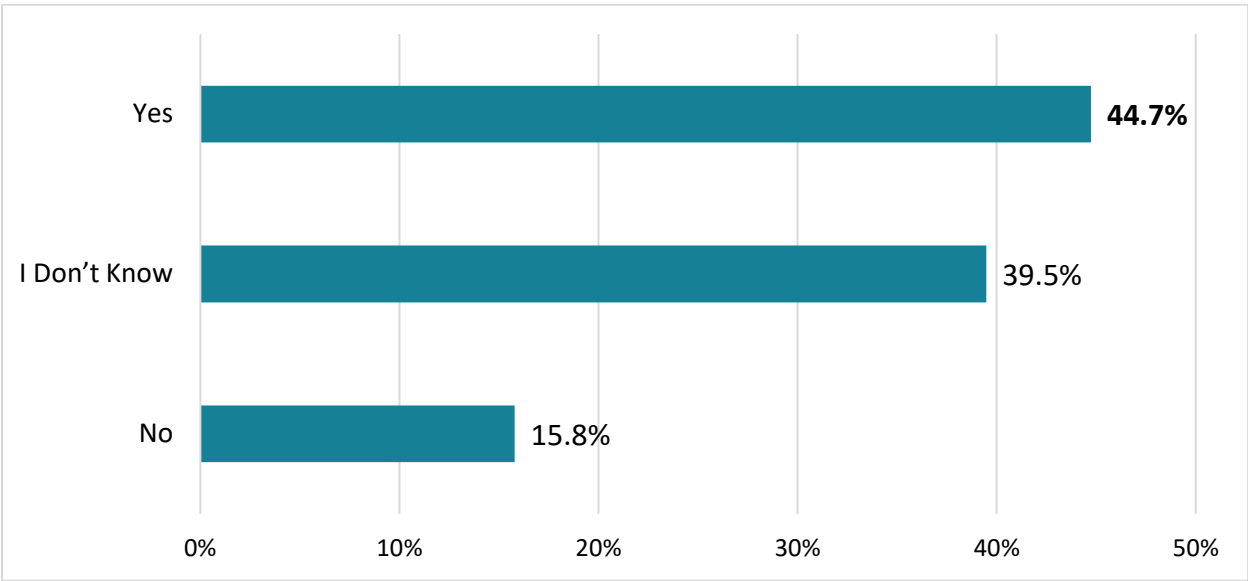
- The vote passed, so I would say okay.
- Whenever there's a need you rise to the occasion.
- I've only heard two or three negative thoughts on it.
- A successful pledge drive could be an indication to continue forward.
- Everyone is ready for it and is excited, it's just if they'll buy into it or not.
- Originally there was a lot of confusion, but as we go there's more clarity.
- The majority of people think that we need upgrades. Most people think that we need more than just the elevator update.
- The point of greatest grievance is going to be the layout design. Having buy-in is important. It may come down to who is making the decisions and if the congregation is ready and willing to approve those decisions.
- Most people are ready for it. There's always going to be a few that have strong opinions and aren't open to the entire picture. There's been a lot of waiting and people are excited for it to start. The money is out there, it's just about it they're willing to give it. We need to see that it's actually happening.

Increased Project Communication is Needed

- It's a little confusing with all the different stages and the process of this project. It's like a recipe, you have to do it step-by-step.
- Haven't talked to a lot of people but I think it's mixed. If they are expecting high donations, they might scare people away.
- 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.
- There's an acceptance that this is long overdue. There's an acceptance of the priorities. There's a little hesitation with what does this mean for me and my financial contribution.
- There is some confusion about the project going from an elevator to this larger scale project. This could have been presented better to the congregation. It will come down to a few people because of money.
- Thought it had been received well until the vote on moving forward. There were questions raised that I wasn't aware that were being questioned, like have we talked to more than one construction company?
- It could be better. There's a lot of people that still have questions and are looking for updates repeatedly and are struggling with the concept that these types of projects take time, and we don't have all the answers right now.
- Should be giving more updates. The Council needs to be more intentional with the information that they give out. People are questioning why it's taking so long and if this is really going to happen. The church community and vibrancy are getting better. Push how this will get people to stay and come to this church.

Q8: We are testing a giving matrix as part of the feasibility study. Do you believe the campaign goal of \$1,800,000 is achievable?

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Confidence the campaign goal is achievable:

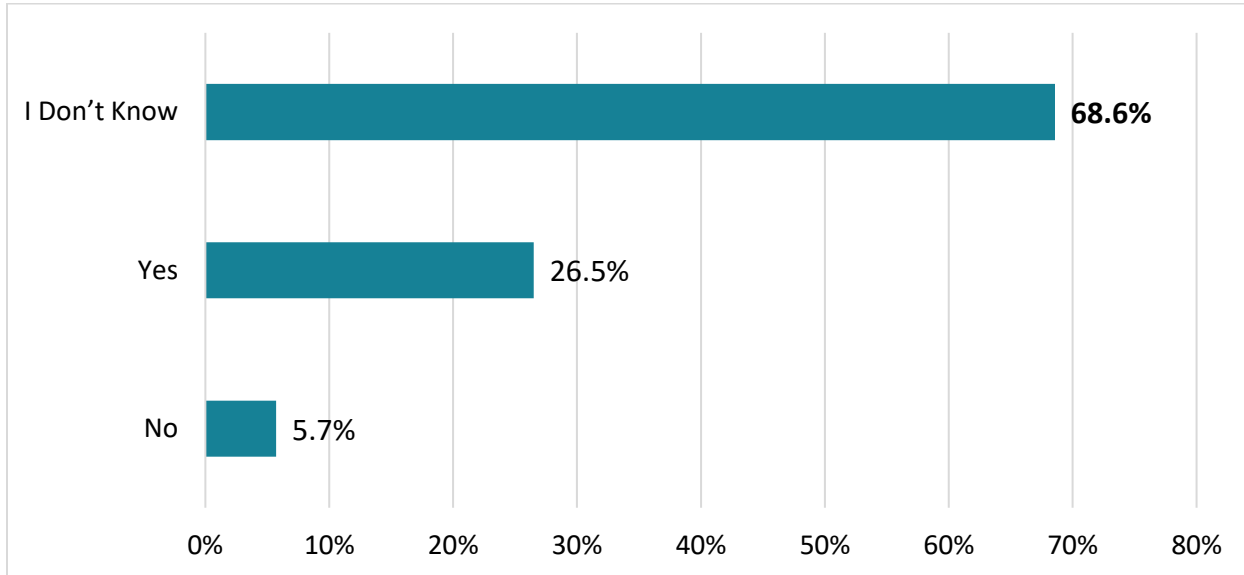
- If everyone is on board and invested.
- As long as older people decide to give.
- It could be but it would be a few years.
- We just need to ask people for money and they'll give it.
- Absolutely if people buy-in and support it. We have some members who could possibly contribute a big chunk of the goal.
- Putting it in the context of building a new home, this project is not that exorbitant. The younger generation is going to need this.
- I'm a firm believer in it will come, but not right away. I don't think it will take more than a year or two for people to step up and give.
- There is prime agricultural land here. There's a lot of older members who have land still and are looking to see what they should do with it. The amount of the project is small when compared to what houses are being sold for now.

Unsure whether the campaign goal is achievable:

- It's going to be a stretch, but we might be surprised.
- Depends on the wealthier households. It's possible but not a slam dunk.
- Would hope they raised the full goal and not get loans (debt services). Skeptical of dept paying ability.
- There's at least a couple of families who will give 100-200k – don't know if there's someone who may give half a million.
- I feel like we could get enough to do the project. We could possibly fundraise part of it and borrow part of it with ongoing fundraising/pay off.
- If it's all raised in cash, we'll have problems. With a long-term loan we might be able to do it. Obligating individuals to finance the entire goal may be hard.
- 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). We can't be dependent on the congregation for a long-term plan. They need to find a way to do this without tying down the congregation.

Concerns the campaign goal **is not achievable**:

- Finding volunteers and raising the money will be challenging.
- It's going to have to be outside of our regularly budgeted church giving. 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. Endowments are the way to go. I would look to alternative sources for funding.



Confidence boosters

- It's a great visual for people to see what we need. (2)
- The upper levels are always questionable, but I believe that we can pull together. When you start, people step up.

Important considerations

- Not with cash donations alone.
- Gifts, yes, the number of prospects, no.
- The lower levels, yes, but the top three or four I'm worried about.
- 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.
- From \$25,000 down, yes. Not sure about the higher ones. Maybe we could reach the goal over 2 years, but not right away.
- The church has an older population. Hopefully they have accumulated enough assets and don't need them for personal expenditures.
- The lead gifts scare me a little bit. Below those I'm confident. More gifts can be added to the \$5,000-\$25,000 levels.
- People could afford it but don't know if it would actually happen. Think a lot more of the \$5,000-\$10,000 range of gifts than the larger gifts.
- Look at the choir and see if there is a donor or collaborative effort for the choir room, because the choir room may not be super relevant to the entire congregation.
- The lead gift is always tough, but we may get mid-lower giving than presented in the matrix. There are people out there that have the capacity, but this campaign may not necessarily be in their giving plan.

Do not know

- Probably the lower levels.
- The top ones might be tough.
- At least 80% would be achievable.
- I think that a lot of this money may come from older people.
- If it has to be up front, no. But over time (5 year commitment) maybe.
- Might have more success with more smaller gifts than the bigger gifts.
- You'll have more in the \$25,000 and below. The \$500,000 is maybe not attainable.
- I'm not sure this method will work with the church. The top is accurate, but the midsection you might not get. Maybe add more to the bottom.
- The higher ones can be done, it's just whether people are going to give or not. 25 gifts of \$1,000 is very realistic. 10 gifts at \$5,000 is realistic too. There might be more in the \$15,000-\$25,000 range.
- The top three are going to be tough. The many under a thousand (bottom level) may be tough too. How many are going to be able to do that (give to the church and give to this project?). \$1,000-\$50,000 is more realistic/achievable.
- The lead gifts of \$250,000 and \$500,000 are going to be a problem. The older people in the church might be a little out of touch with the amount of money we need. We could get the Not at the higher levels unless someone had a life insurance policy that they gift to the church. I could see a lot of \$1,000-\$5,000 a year. That would be about 90% of the congregation.

Q10: At what level might you see yourself supporting the campaign?

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See page 19.

Q11: What scenarios might influence giving/giving more than your anticipated level of support?

n=37

Multi-year pledges

- The ability to pledge over time. (16)

Personal Capacity

- Personal Finances. (9)
- Health. (2)

Advancement/Progression of the Project

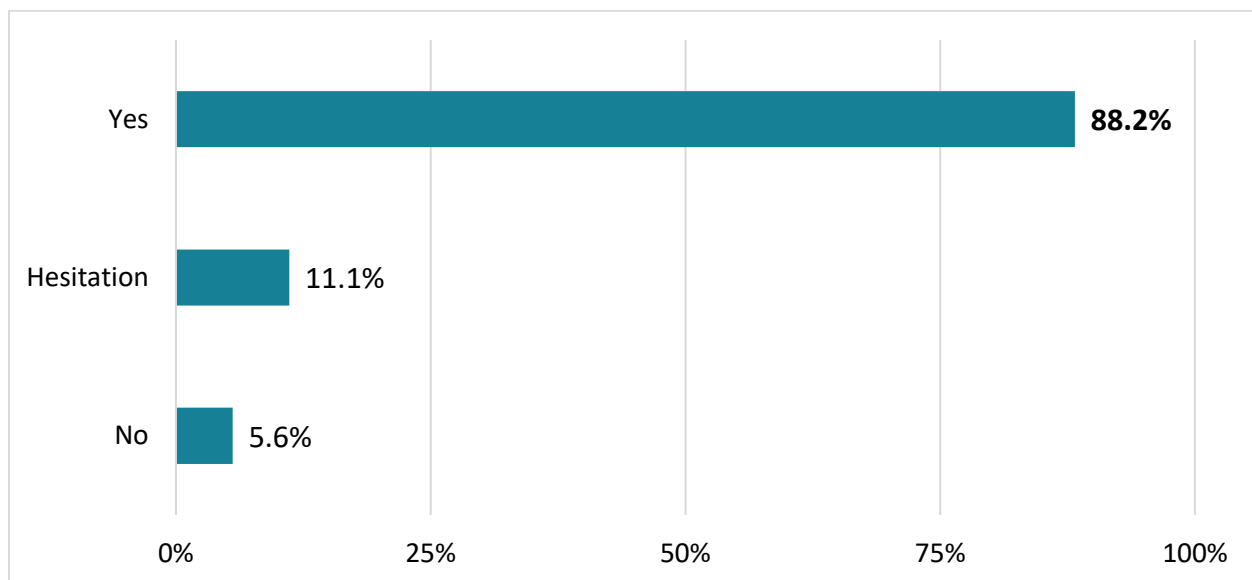
- If funds were almost fully raised, we would give more. (3)
- May give more to avoid borrowing/loans.
- Seeing the project going in a positive way.
- End of campaign push. Potentially getting a 10–15-year loan.
- Dependent on where things are going. If things are going less well, we may try to give more to help. Giving will be based on the temperature and feel of the campaign.
- Seeing it starting to be built might influence others to give more. Once we break ground more money will come in and when it starts to get done more money will also come.

Other

- If we stay in the community longer than we expect to.
- Describe in a way that donations can be given in a will.
- If I designate part of my life insurance policy to the church upon my death
- Recognize givers in tiers as a Platinum, Gold, Silver giver. Being recognized is important to some and others may want to be anonymous.

Q12: Do you personally support the proposed capital campaign goal and fundraising plan detailed in the case?

n=37



“Yes” comments

- We need change. Need a real plan to raise money.
- They have done a good job trying to keep the cost low.
- Part of me still wants to think that they could cut some costs.
- I do believe our church needs it; I just don't know how we're going to get there.
- Are they trying to raise a certain amount of money before a certain time before they move forward?
- There should be some minor changes in the layout (the work room needs to be bigger for the copier, table, filing cabinet).
- Talked for 25 years that Zion needs a main level fellowship hall. We'll have a more active church with a better fellowship hall.
- As long as we have enough commitments to move forward. I don't want to move forward unless those commitments are secured.
- There are little things in the layout that I think should change, but it won't change how much we give. If you want a youth director, they should have a nice space too.

“I don't know/Maybe” comments

- Skeptical that the money can be raised.
- Some of the additions aren't necessary, like the car port.
- If the congregation does or doesn't support it that's fine.
- I would be more in support if the total was closer to \$1.25 million.

“No” comments

- I am not sold on the need for an elevator.

Fundraising Strategy

- Fully raising the funds. (2)
- A plan to raise the money.
- How to get donations and maintain weekly giving.
- Making sure people do what they commit to. The ongoing management of receiving those funds.
- We need to start looking at endowments, they have a loyal elderly crowd here and it's a matter of asking properly. Make sure everything in the plan is right and they are able to answer questions correctly otherwise they won't give. Banks will loan off a life insurance policy if you put the church as a beneficiary.

Target and Motivate All Members

- Get the people who don't come to church back into church.
- To get the younger members on board and involved/invested.
- That it touches all levels of the congregation (elderly, young families, children).
- Get more young people involved and invested in the church/project. It needs to be community oriented.
- Getting people to come to things to show up and actually buy-in. How do you get them to buy-in to the campaign when we can hardly get them to church?
- Everyone in the church needs to reach out to those who don't come to church to get this done, even if we don't like it. Educate us to know how to reach out to people.
- There will be two arguments; "I'm too old and on a fixed income" and "I'm young and have a growing family." Get the youth involved and get them excited about it.
- How to get the rest of the congregation invested in it to actually support it. I know if we took a poll everyone would say yes, but there's fear in having them put their money where their mouth is.
- Convincing the older members that this is something that is needed. Sometimes they see the money and think "woah do we need something that expensive?". They may need to sit down and talk to these members and listen to them.
- Giving their focus to those that have objections. A lot are playing the silent majority role and think it should happen. It just happens to be the ones who don't support it that come forward. Trying to overcome the hurdles from those that have objections and anticipating their questions.
- If this is going to be successful everyone has to be on board and give something. How do you reach out to those people and get them to understand that they matter, and we need them too? How do you get in touch with those younger families to get them to realize this is an investment in their kids and the future generations. If we can really explain that to people, it will probably pull on their heart strings enough for them to realize it's important to invest in the future, even if it takes sacrifice now.

Address Fundraising Concerns/Potential Challenges

- Not sure we can achieve the goal if we are asking people to double the amount they are already giving.
- Going to have to do some convincing of the people who are saying that they don't know about reaching it.
- Fundraising is going to be the biggest challenge. I've heard that people will give money to the project, but not to the general fund.
- It would help if someone would donate land as a lead gift. Going to need some large gifts. More than selling BBQ at the activities.
- Where's the money going to come from? There's going to be a lot of questions about funding. Have they looked into grants, loans, etc.
- Zion never does stewardship. They never ask people to give, it's more of a passive way of giving here. They're not intentional with their asks/giving. We need to build a culture of giving.

Importance of Communication

The message

- Make it known that this is important for the church, community, and the youth.
- Convincing people of the need. Promote the benefits and why this addition is needed.
- You need to explain things about the project at the basic level, expect that people don't know anything.
- How to encourage people to make the commitment to the church and Zion's longevity. Give them a reason as to why/how they will benefit by giving.
- They have to relate it back to people saying if you have this 1980 home are you just going to put all this money into it and temporarily and continuously fix things, or are you going to tear it down and make it new?

The approach

- Share the plans with everyone.
- Build the excitement in the members.
- Keeping transparency and updates coming.
- Keep the word out there, keep people informed.
- Selling it. Getting people onboard. The excitement when they present it.
- Make sure they keep giving people the opportunity to join the conversation.
- Getting the congregation invested in the project. Have check-ins or someone available every week at church to answer questions.
- They need to keep the congregation in the loop. If they are not in the loop it's going to cut them off and they're not going to give. Even if things are going well, keep people interested and a part of the project.
- Have to continue to get people to come to church. Have to make sure that we don't lose people. Make sure everyone is doing their part. Keep the youth director and kids active. Nothing wrong with putting out there all the fun things they do on social media. Push an online presence of the youth group activities.

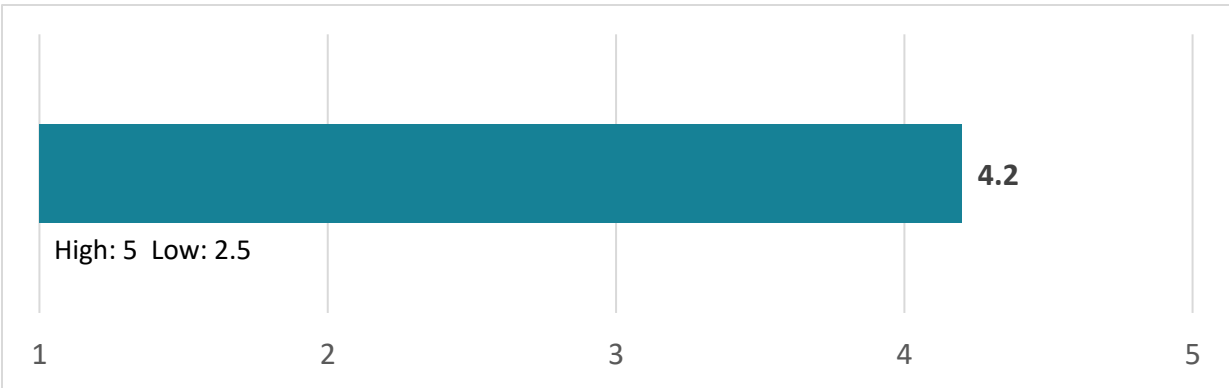
Scope of work

- The gas pipeline.
- Consider what to do to the parsonage/current renters.
- Figuring out logistics of getting land all the same height.
- Managing the people. Once you start getting into it, people are going to start nitpicking the design.
- Whether the elevator is actually needed. Do they need to spend that money if we can fix the stairs and put in ramps?
- Design and layout of the project. Be prepared to have more drawn out conversations about the plans and entertain the idea that the floorplan can use a little work.

Other

- Everyone putting in their input may be a challenge too.
- To trust the committee. We have good and capable people looking at this.
- I wonder if this could drive away some people from our church. Have heard one or two grumbles about that.

Q14: On a scale of 1-5, 5 being very confident, how confident are you in church leadership’s ability to achieve the campaign goal? (staff and council) n=37



Confidence Boosters

Overall Leadership

- Good leaders.
- They are smart people.
- Seeing it move forward.
- We have strong leadership.
- They are knowledgeable people.
- Those on the task force are aligned and ready to go.
- They seem to know what they’re doing and have planned well.
- They are good leaders. We’ve talked about this for a long time.
- They are individuals that are well-versed and know what they are doing.
- They’re young and energetic, they don’t mind going to meetings every week.
- The leadership of the council. We have a lot of financial people on the council.
- They are very passionate about it and our church. The team is dedicated to the project.
- They’ve done a lot so far and have no issue with them. If it doesn’t materialize, it’s not their fault.
- They’ve got this far and it’s a lot farther than it’s ever been, so there’s some commitment there.
- They are willing to work toward it. They are willing to go the extra mile to talk to people and show them what it’s all about.
- Very confident in them though. We have some great young people working on the council and they have done a great job.
- Joey will do good and whoever is with him will too. Doing what they have so far has assured us that they will continue to work on it.
- There’s a good group on the building committee who understand the industry. Trust the architect. It will go well if funding can be secured.
- The fact that this has been going on for so long. It’s a little confusing. The people that are doing this are very driven and want to see it through.
- I know who’s working on it and I trust them. They are very knowledgeable and transparent but there’s always the question of “why are they taking so long?”.

- They'll take it and run with the project. They'll start the discussion, fundraising, pledge drive and see how far they get. They are being transparent and keeping the congregation informed.
- We have a great council, the best it has ever been. They are supportive of Pastor Corey and each other. They recognize where to put people/find people to fill needs. They recognize the talent within the congregation.
- There's confidence in their ability and their skills sets and dedication. This is by far the most traction we've had, and this project has been going on for 20 years. It's just the question of if everyone will rally around and understand the need.

Pastor Corey

- Pastor is a good leader.
- Pastor Corey has been really good for the church.
- I think Corey knows what he's doing. People really like Corey.
- Pastor Corey is great and does a great job sharing information and being transparent.
- Corey is the first minister who made it his priority to reach out to those who are not attending the church. He's a great guy.

Confidence in Leadership with Reservations About Fundraising

- A lot of great minds are trying to figure it out. They have great intentions, but there are factors that they can't control.
- We have a good council with good focus and commitment. I am just reserved about the ability to get the higher donations.
- It's not that they're not capable, it's just that it's a large amount to get from people. The ability to get people to give the money is the challenge.
- I trust that they are doing their job and doing their due diligence. We have some strong leadership that wants to keep our church going, it's just a lot of money.
- They've handled things well in the past. 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.
- The council is young and fresh. There are some that are taking a leadership role, but we need more. Full confidence in them, but they are not the ones who will be giving the money.

Concerns

- They haven't been pushed and they might not know how to make asks.
- There are concerns about the logistics and what is really possible to do given the available area.
- There are still some on the council that are on the fence and aren't convinced that this project is something that is needed and they still just want an elevator.
- It's difficult for members of the church to go out and do the asking. They could potentially lose the donor if it's not handled well.

Q15: Is there anything else you would like to share that I have not asked you about?

n=37

Specific to Fundraising

- Are there opportunities for members to give their time to the building improvements?
- Real estate is a big value. Grain and livestock pledges could work for our congregation.
- Could maybe get a grant from the National Preservation of Buildings from our daughter in D.C.
- Can they do a Temple Talk on the stock donations or gifts of grain? Monthly giving breakdown on a matrix would be helpful.
- You may have to educate members on charitable donating/giving as a discipline. Be mindful of the \$1.8 million having a shelf life.
- We haven't seen a real stewardship drive in the past few years. No one has asked us to change our weekly offering. Maybe if there was a yearly push on that they would give more.
- Is there a percentage of the dollar amount that they want to come from the congregation? I don't want fundraising for other areas (camps, youth activities, etc.) to be taken away to pay for the building.
- Zion doesn't ask if people will increase their donations/giving. Raising funds should be easy because no one has been tapped, it's just if they're willing to give. We are all for a capital campaign and asking people to give.
- Are they looking into local companies/people to build for a fraction of the estimated cost? Are we looking at enough bids to do this efficiently so that donations are being used in the most efficient manner? This may change the attitude about giving.
- Are they using local subcontractors (gifts in-kind) like Steve Electric for the heating system to work a good deal for us. His neighbor does flatwork concrete. If people realize that they are trying to do it locally (hire local subcontractors) sometimes people are more willing to give.

Debt Payment Concerns

- It would be nice if we wouldn't have to borrow money.
- Would hate to borrow money and have to pay interest.
- I hope we can do it without struggling to make a payment.
- I like the idea of trying to raise as much money as possible without getting a mortgage.
- There were times where they couldn't meet Synod obligations, budget issues, repaying debt issues. We do not want to see that happen again.

Specific to Scope of Work

- Do we need everything that's proposed? Can there be another option?
- I would feel more comfortable if I could see a breakdown of the cost of each section.
- If they can't fund the entire project, it would still be nice to do at least the elevator.
- The new kitchen doesn't need to be a meal prep kitchen, it can just be a catering kitchen.
- Putting up curtains in the basement isn't going to work. You can still hear the kids through the curtains.
- A small space for medication or private baptisms might be nice. I wouldn't redesign the building around that but just something to consider.
- They put it all into one campaign and say they will save money, but their need right now is just the elevator. By adding everything else it's a huge additional expense.
- Doesn't seem like they are adding any more capacity to the church. There're layout issues. Could we put the fellowship hall and sanctuary right next to each other?
- Have they thought about just redoing the kitchen downstairs and fixing the elevator? If they took the overhang off what would be the cost? You've got so much space here, can't we get rid of the lift and put in a big ramp? There's so much space there and it could alleviate some of the cost.

Other

- Make sure the people come before the building.
- It would be nice to see the original altar from the church preserved.

Q16: Who do you know that you believe would be passionate about this vision and interested in learning more about the capital campaign?

Groups/Demographics:

LAST NAME	FIRST NAME	TIMES RECOMMENDED
Baum	Kevin & Robin	2
Blums		1
Elevsons		1
Engebretson	Garry	2
Freik	Steven & Christopher	1
Halversons		2
Hoits		1
*Hermanson	Gary	1
Johnson	Richard	2
Jones	Leah & Chad	1
Lardy	Scott & Angela	1
Larsons	Steve & Barb	1
Stevens	Bernice	2
*VanDeberg	Justin	1
VanHolland	Travis & Angela	1
*Wiese	Loise & Owen	1
*Winter	Mike & Kathy	1

*Indicates a name given who was included in the feasibility study.

Groups:

	TIMES RECOMMENDED
Church committee members	1
Former members who grew up in the church	1

Q17: When the time comes, is it something you would be personally interested in getting involved in? n=37

Leadership Committee:

- Liester, Karl & Jackie
- Rotert, Joey
- VanDeberg, Lisa
- VanDeberg, Justin
- Williamson, Sam
- Winter, Mike & Kathy

Maybe

- Engebretson, Larry & Jackie
- Halverson, Adam (if there is a desperate need)
- Leubke, Marty (if there was something specific they need help with I would consider it)
- Paulson, Kara
- Nelson, Ron
- VanHolland, Angela

Making Calls:

- Liester, Karl & Jackie
- Rotert, Joey
- Williamson, Sam
- Winter, Mike & Kathy

Maybe

- Paulson, Kara
- Skorr, Geneva
- VanDeberg, Justin
- Halverson, Adam (if there is a desperate need)
- Christopherson, Reid & Ruth (we can be partners on calls if it would be beneficial, other than that, no)



CONGREGATION SURVEY

October 2023

84 responses

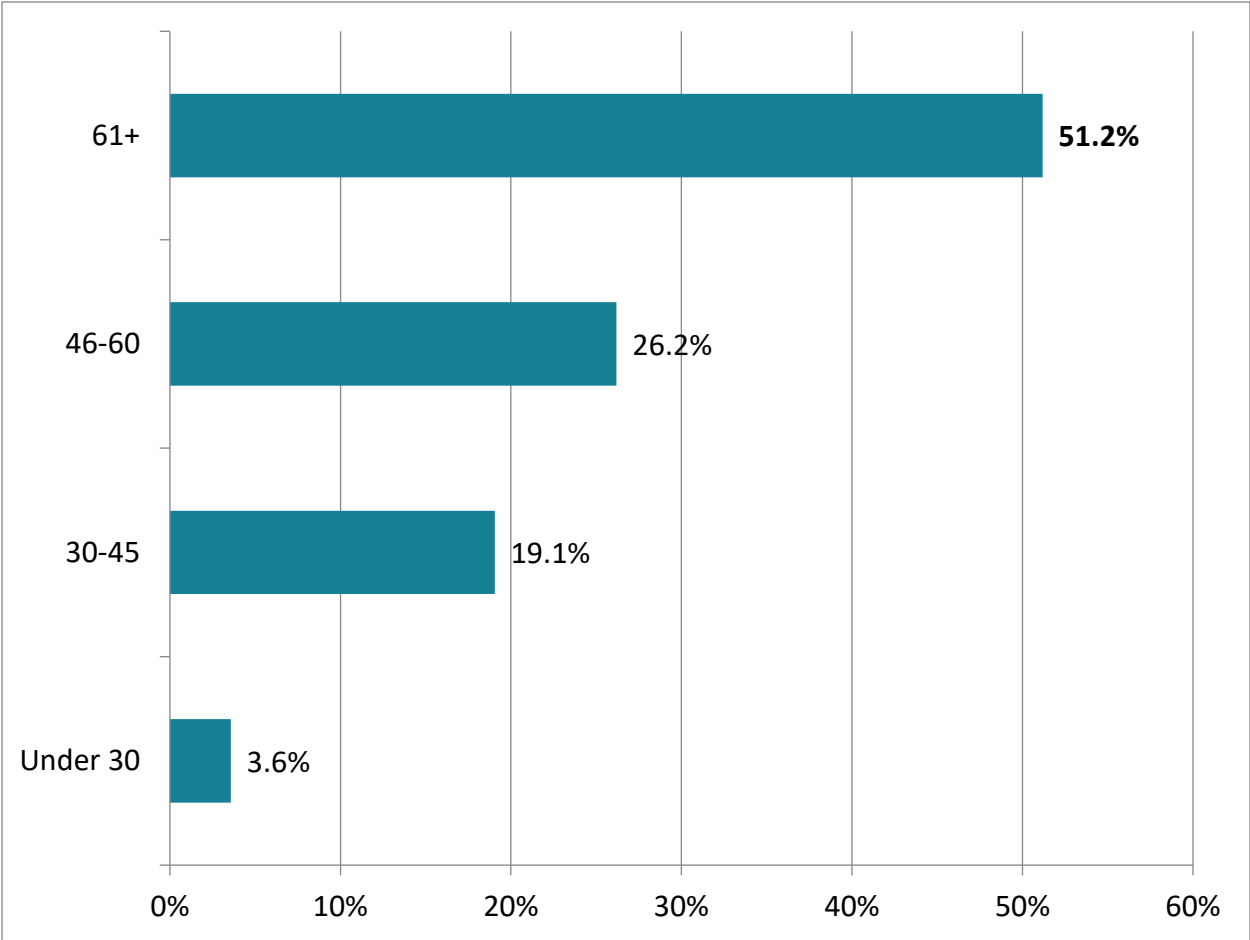
33.6% response rate

250 invitations sent

**Multi-part responses were accepted and categorized appropriately for all open-ended questions.*

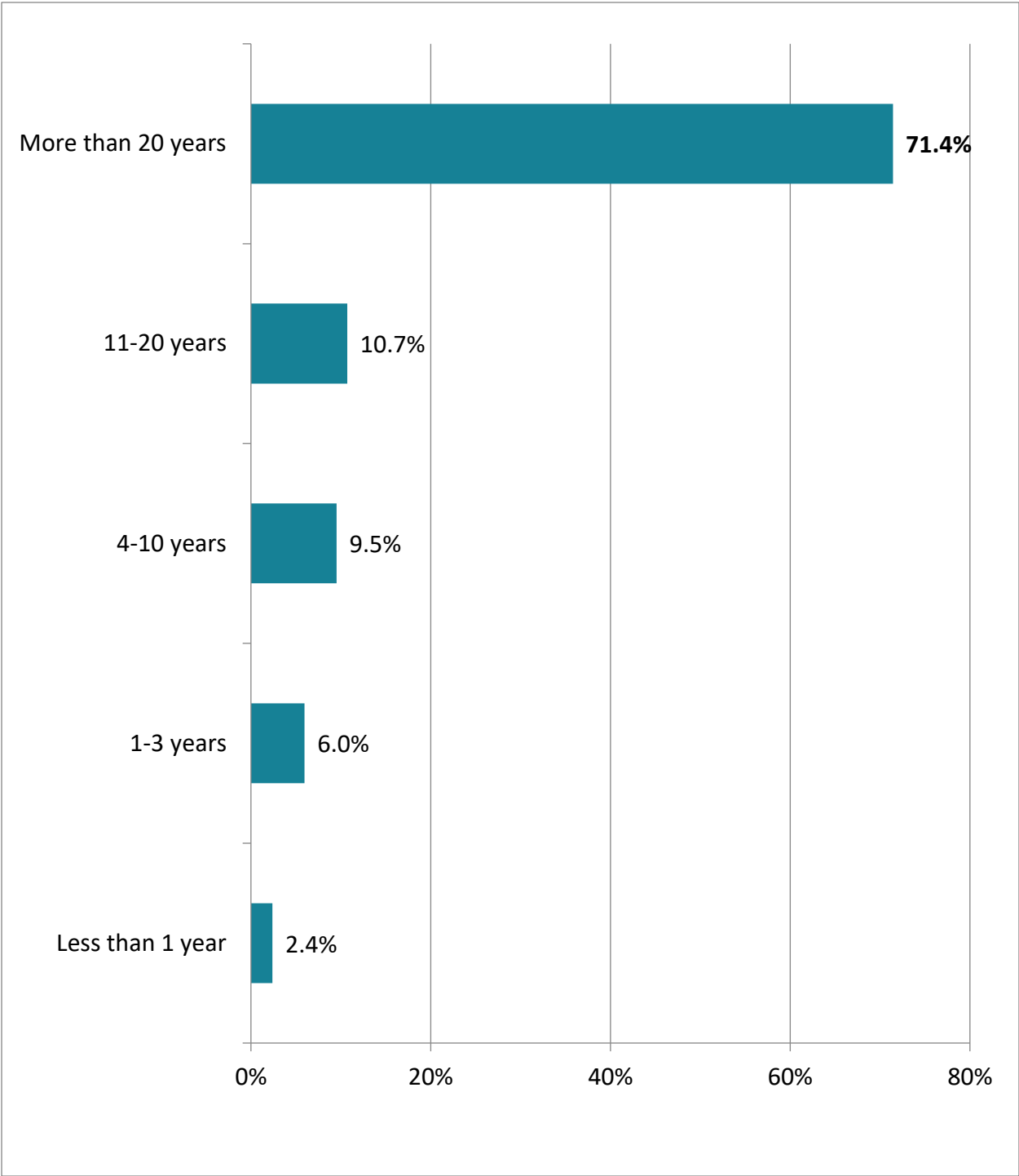
Q1: How old are you?

n=84



Q2: How long have you attended Zion Lutheran Church?

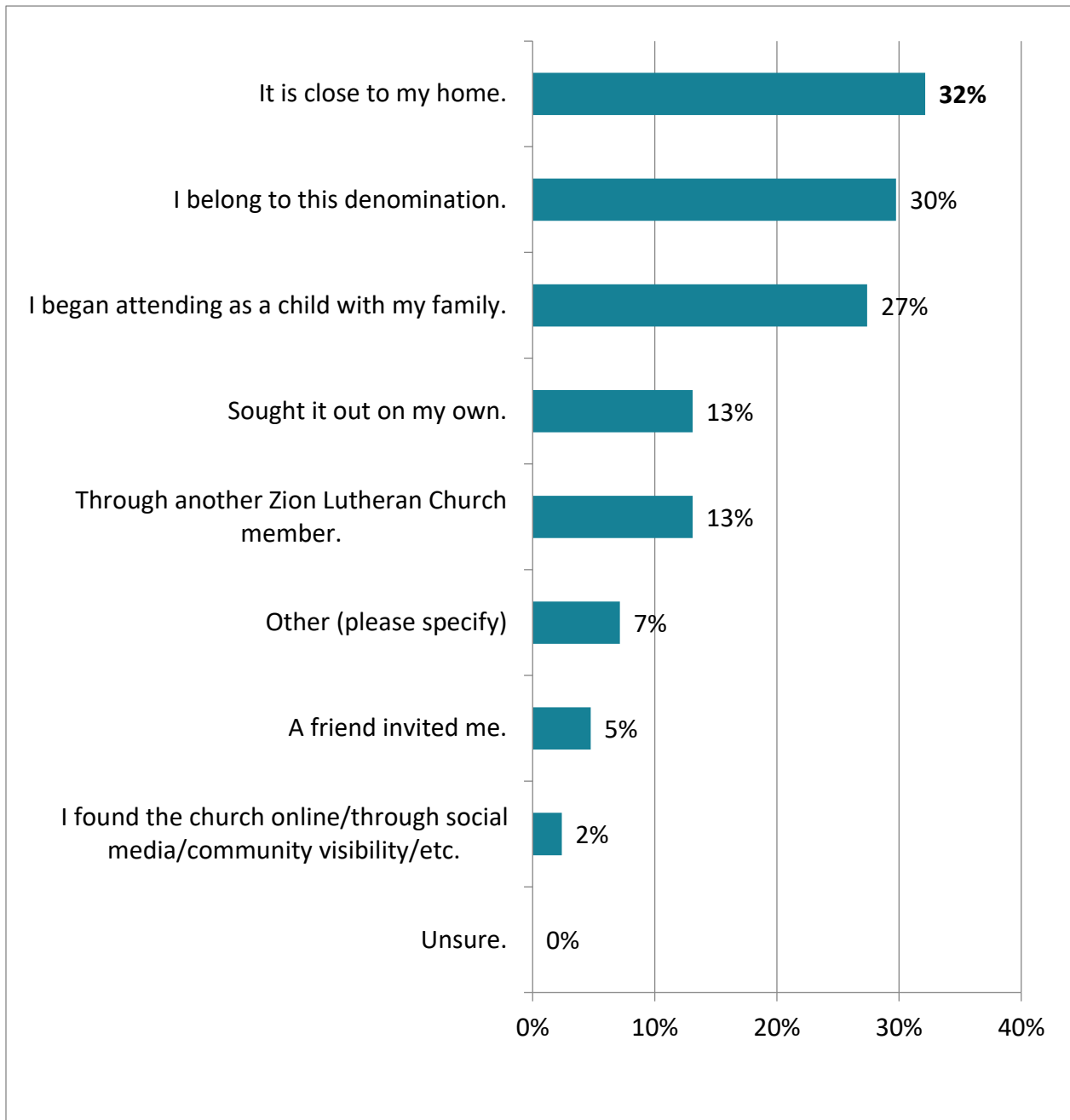
n=84



Q3: How were you introduced to Zion? Select all that apply.

n=84

(Scale of 1-5, with 5 being significant)

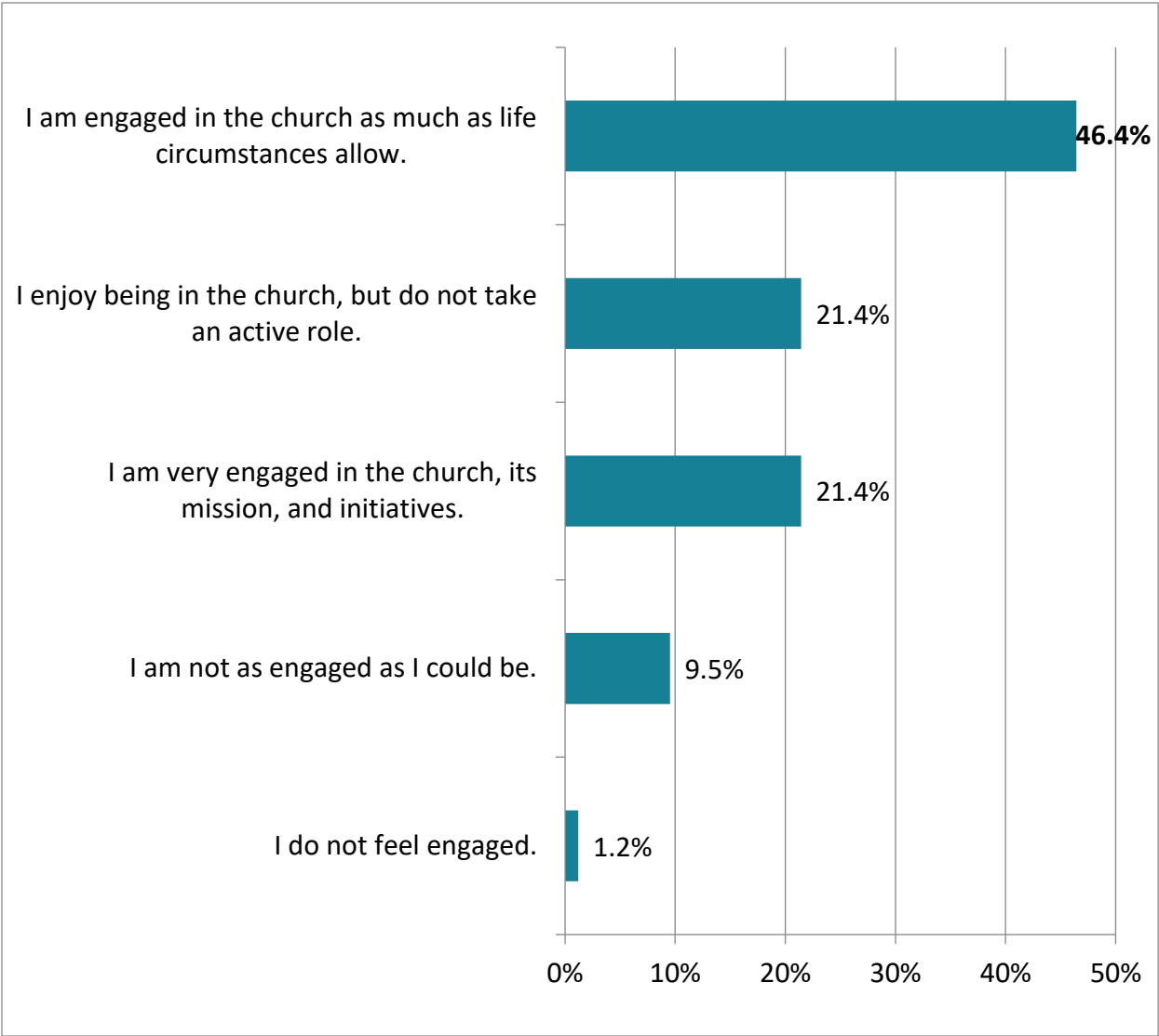


Other (6):

- Marriage (3).
- A part of the pastor's family (2).
- Attending with my granddaughter.

Q4: How would you rate your engagement within Zion?

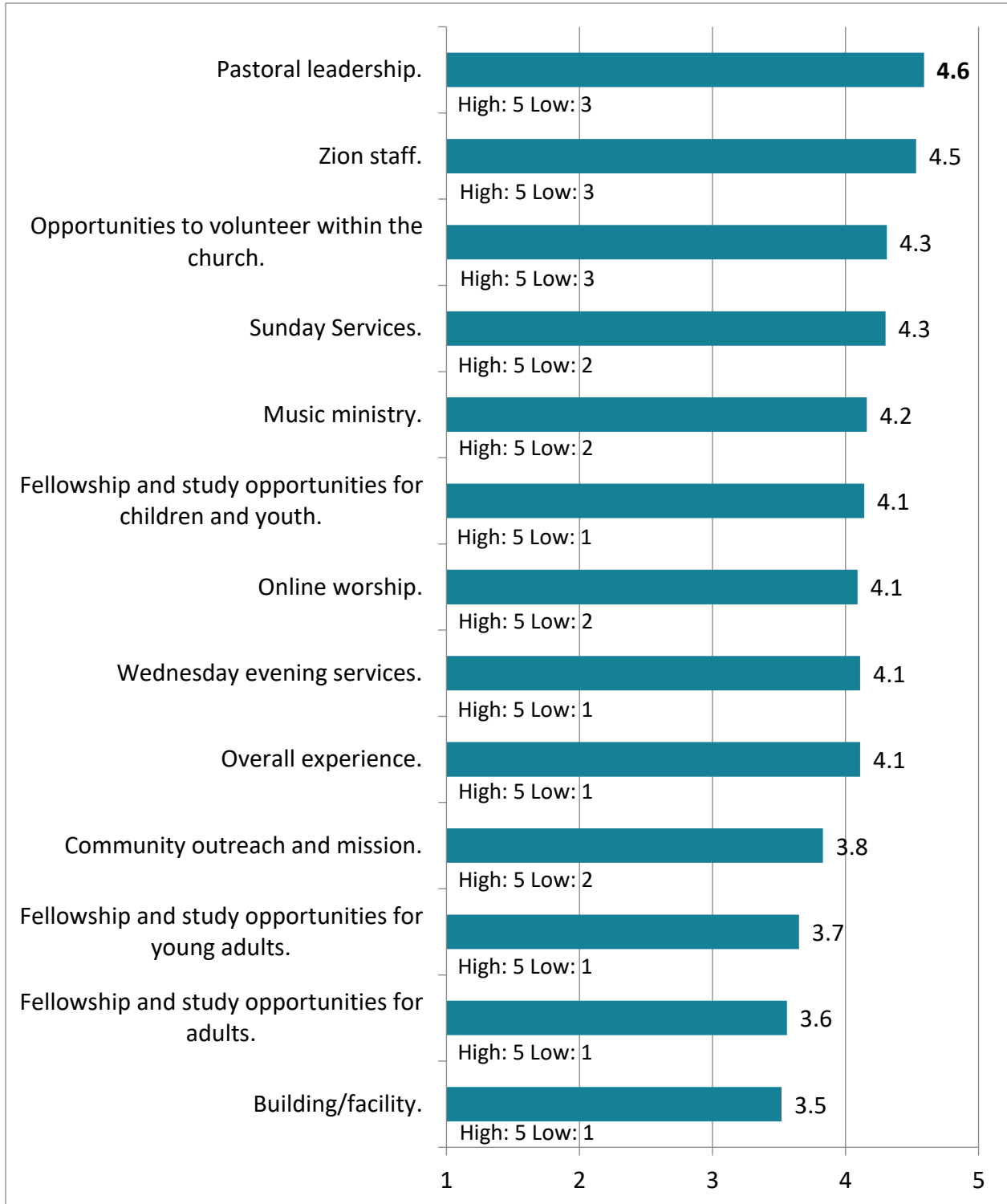
n=84



Q5: On a scale of 1-5, how satisfied are you with the following components of your church experience?

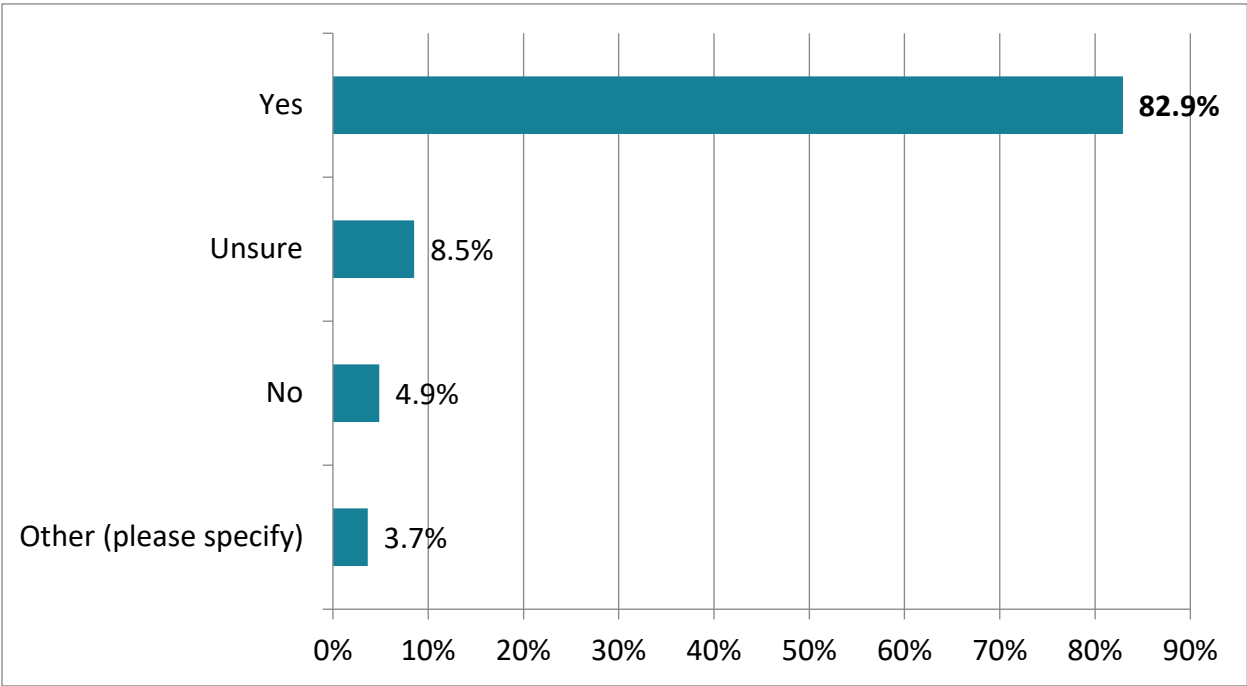
n=79

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



Q6: Do you feel that you know the ways you can get involved at Zion?

n=82

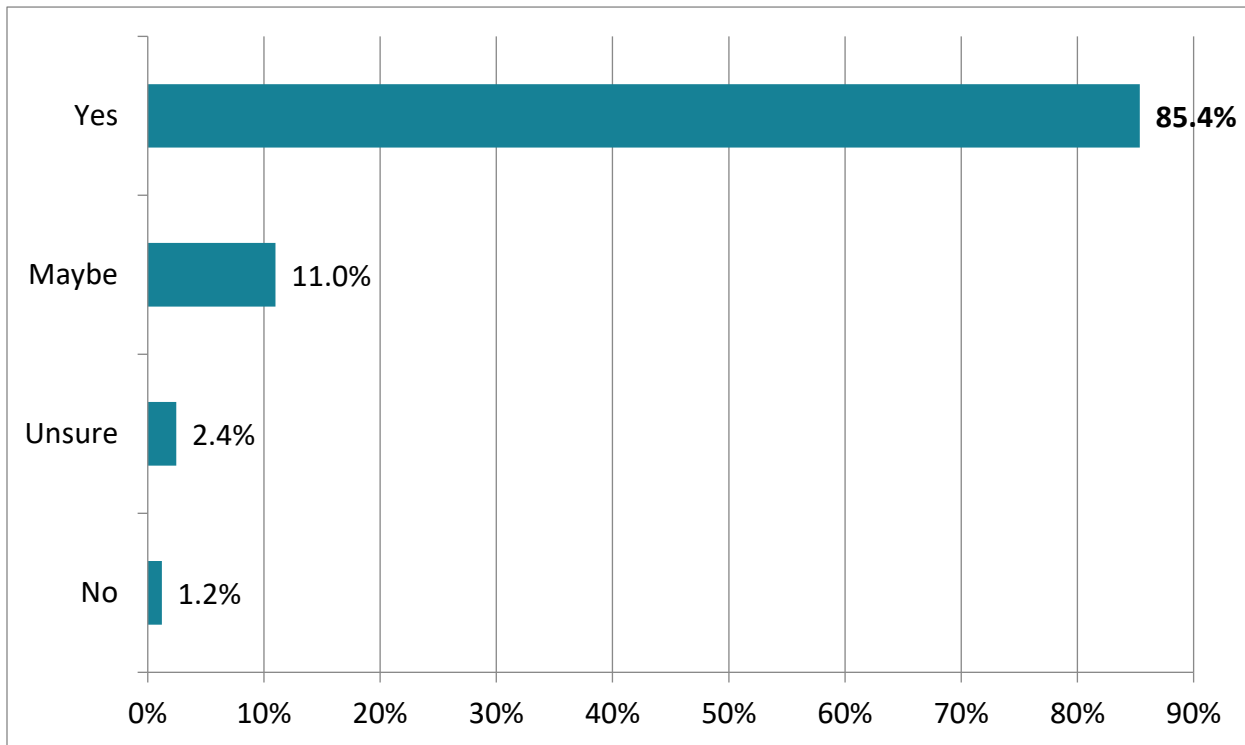


Other (3):

- Too old to be involved now.
- Some-but I know there are more options available.
- Struggle at times feeling comfortable due to outdated “members” mentality.

Q7: Would you invite someone to attend Zion?

n=82



Why or Why Not? (12):

Fellowship Opportunity:

- Small friendly congregation.
- Welcomes people full of joy.
- I am proud to be a part of the Zion family.
- Show others the enjoyment of the services.
- It's so friendly and the atmosphere is great.
- Friendly congregation that is engaged with the community.
- Our congregation is getting younger as new families join, and generally, are happy enjoyable people.

Leadership:

- Good pastor.
- Pastor Corey has been an absolute blessing. In the short time he has been here, I feel like there is more connection and investment into the community and members than there was in any of the previous almost ten years we have been members.

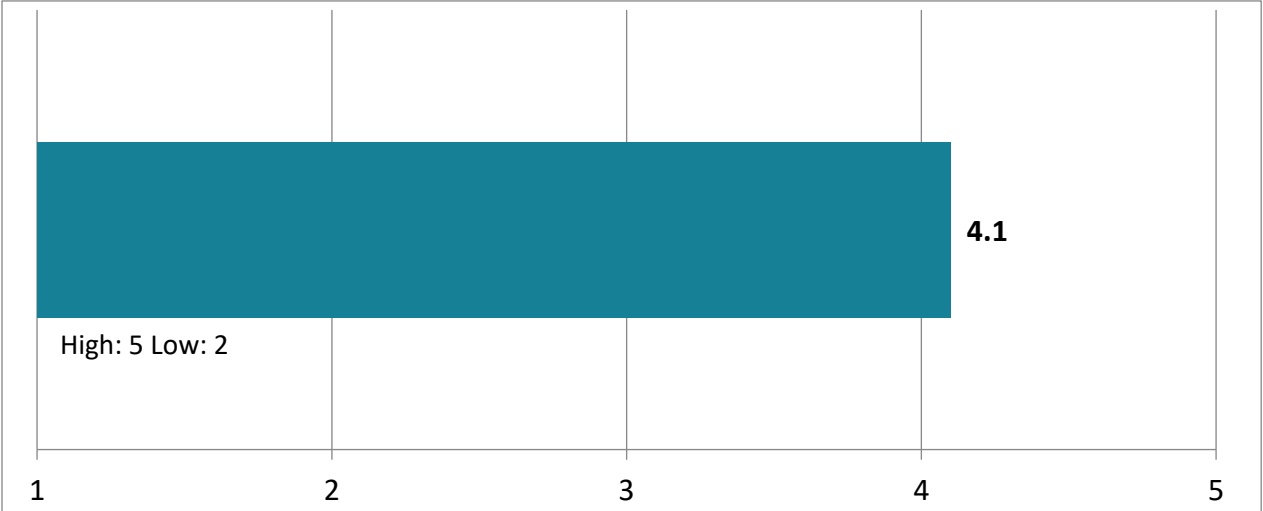
Other:

- Just need to do it!
- It's a good service.
- Come closer to God.

Q8: On a scale of 1-5, how necessary are building upgrades/updates for the church's future?

n=78

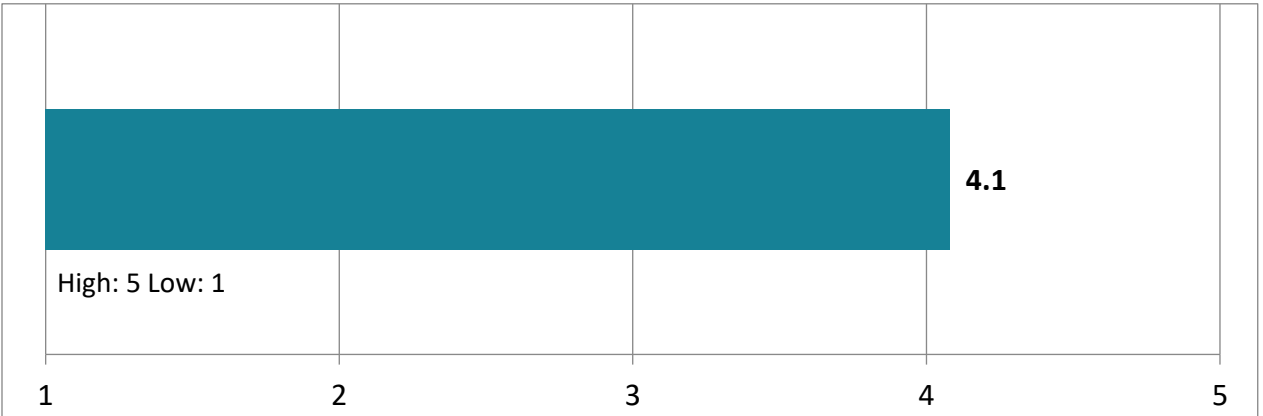
(Scale of 1-5, with 5 being very necessary)



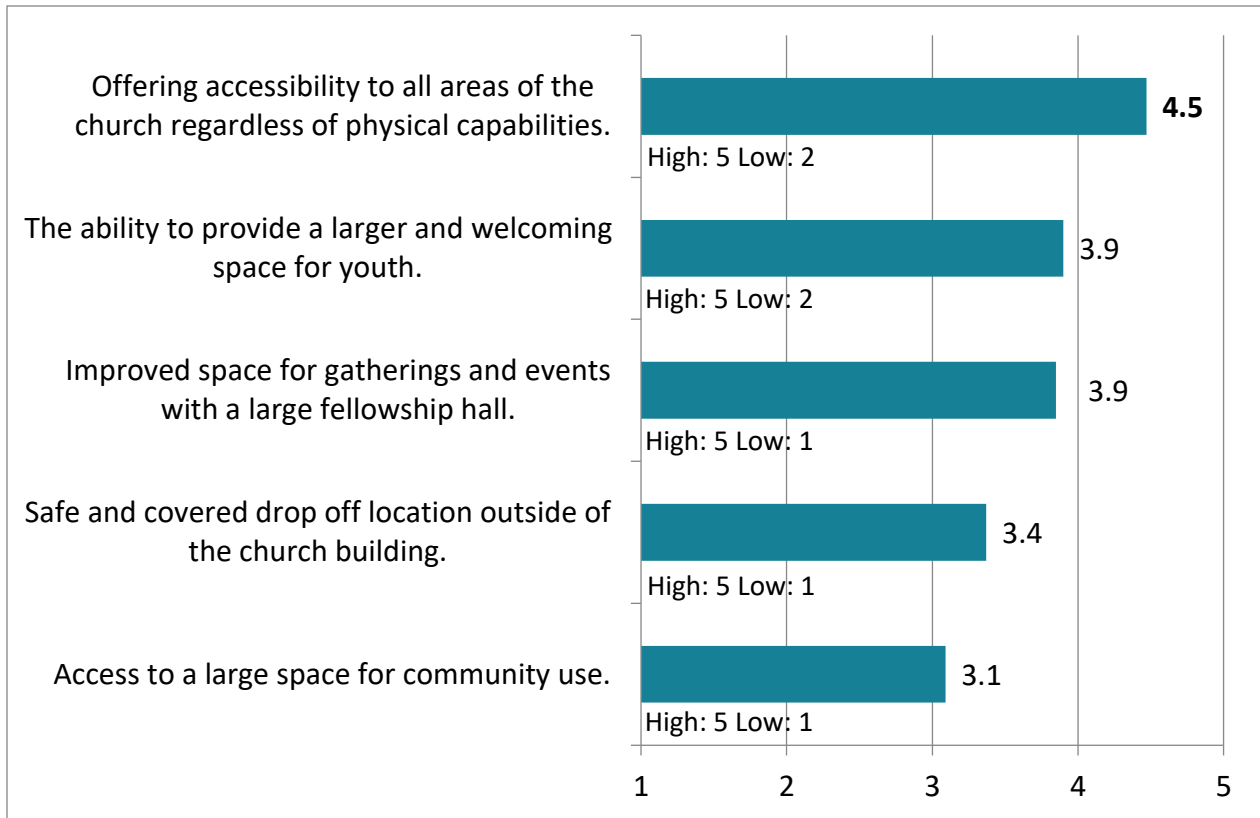
Q9: On a scale of 1-5, how well do you understand what Zion is trying to achieve in this campaign?

n=78

(Scale of 1-5, with 5 being very well)



Q10: In your opinion, on a scale of 1-5, how would you rate the importance of investing in each of the proposed benefits? n=78



What else do you believe should be addressed in the plan (12)?

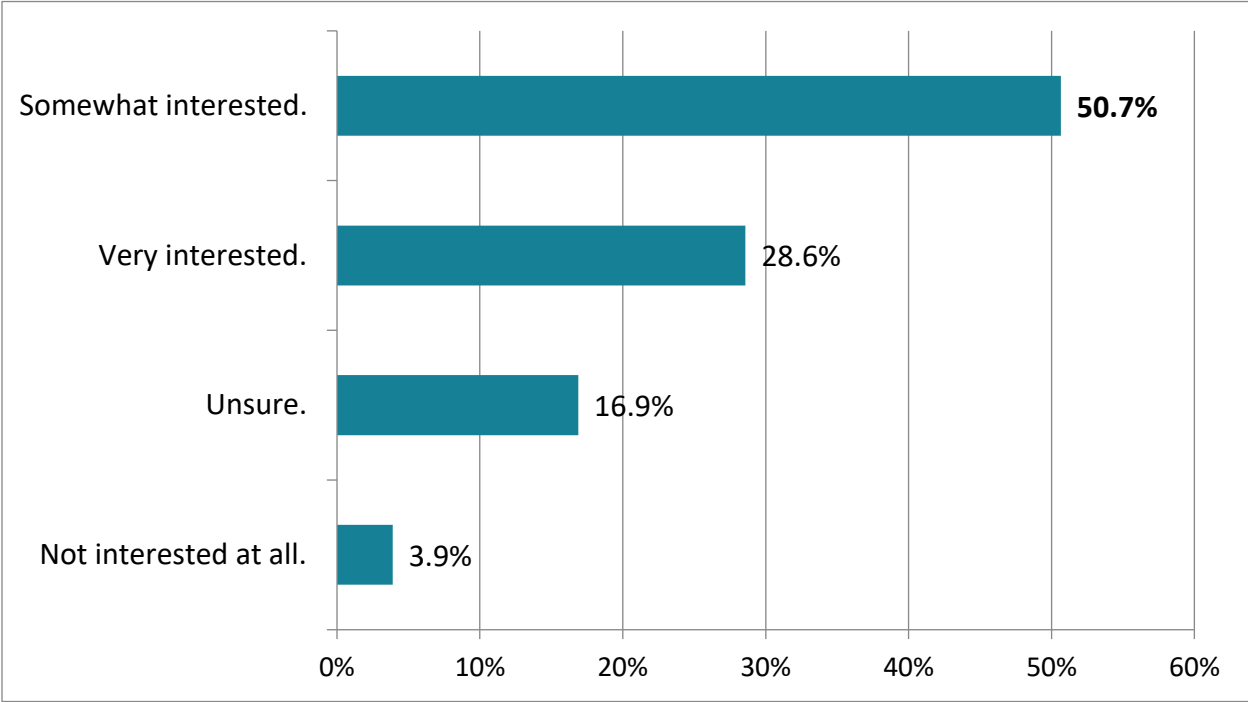
Accessibility:

- Elevator (3).
- Ramps.
- ADA and meeting all codes.
- Adequate handicap parking.
- Elevator that goes up to the balcony.
- We need an elevator to the basement.

Other:

- Expansion of worship area.
- Resolve water issues in the basement.
- Office space with confidentiality in mind/private office space.
- More modern signage in the front of the church with changeable inspirational messages.

Q11: The cost of all the updates would need to be raised by church members and friends of the church. Based on what you know about the project today, how interested would you be in supporting this project financially? n=77



Q12: What additional information would you need to increase your interest in supporting this project financially? n=15

Communication of Project Plans/Benefits (12):

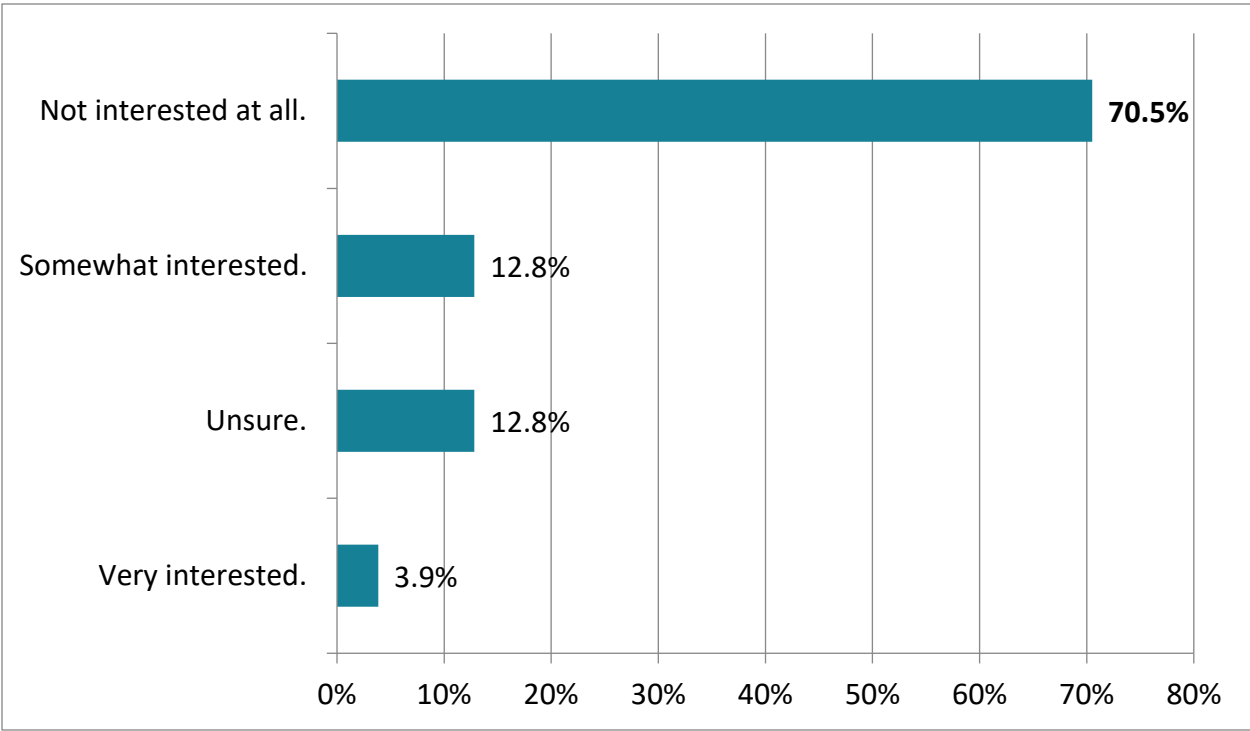
- Cost breakdown. (6)
- Clearer plan and scope of work.
- The time frame when it will be done.
- What is the benefit of an elevator or ramps?
- Listen to the whole congregation, not just a few.
- Visual representation and walk through of the exact plan.
- Breakdown of each phase of the projected project, with these figures accessible in the church and online.

Other (3):

- Allow people to commit funds over time so it isn't an overwhelming one-time giving.
- More members involved in the church, helping with worship, SS, and the various boards.
- If significant dollars are invested, it should be to expand the worship area, not just an elevator to get to the basement for funerals and fellowship.

Q13: Would you be interested in asking others to financially support this project?

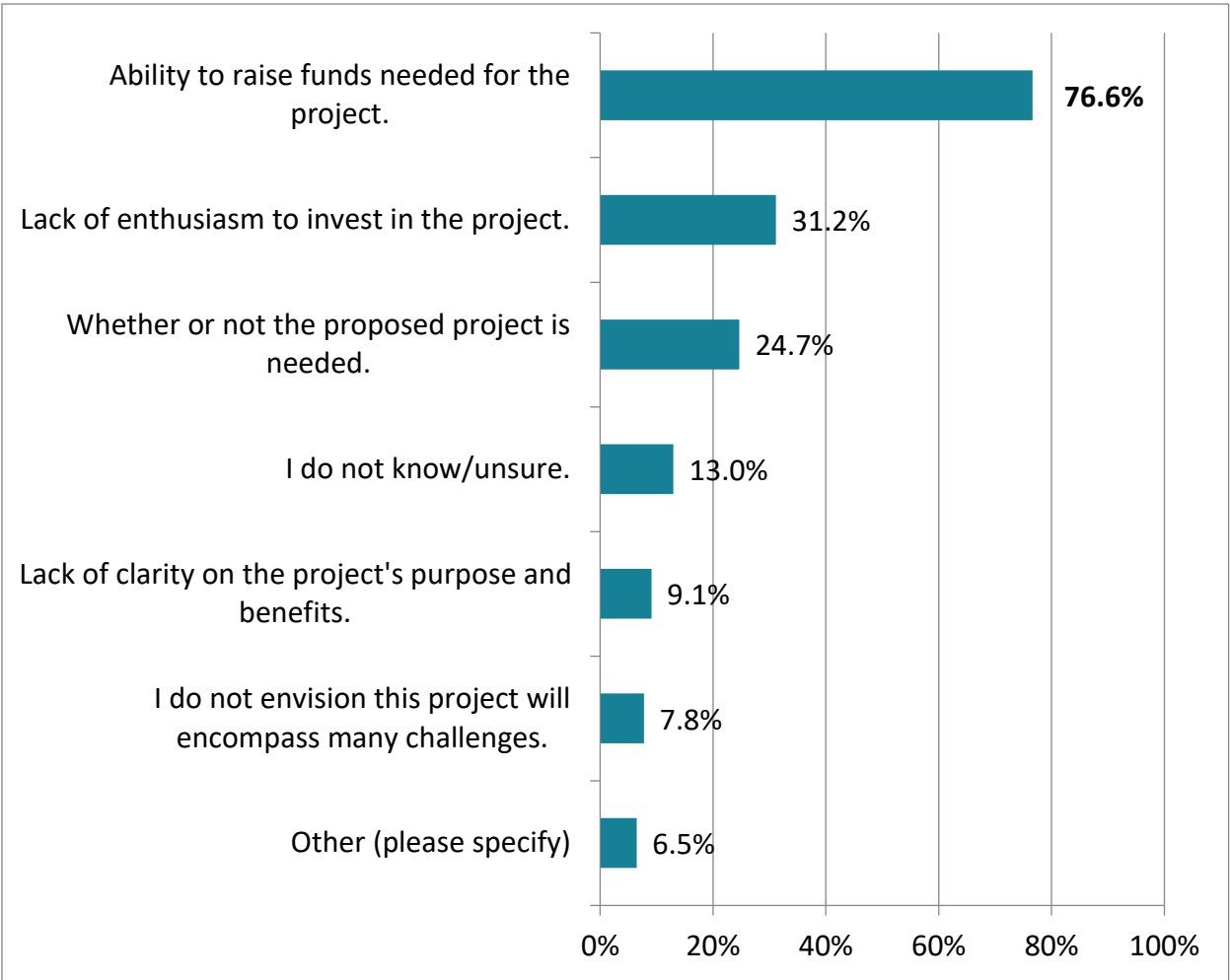
n=78



Please provide your name and email address if you would like to be included in campaign planning and development. (2):

- Sam W.
- Mike Winter; mikewinter74@yahoo.com

Q13: What challenges, if any, do you anticipate this project will encounter? Select any that apply. n=77



Other (5):

- Very cautious about significant debt repayment.
- I agree we need a new elevator, but I am not sure that it needs to be casket sized.
- It's a lot of money, our attendance is not where it should be to support this much investment.
- Modifications are needed. However, get what the building needs, don't go overboard for unnecessary modifications that only add to the cost of the remodel.
- Difference in opinions of what is necessary. I do not believe that many church members clearly understand the building plan, only those that are on the committee or on the council.

Q13: What is the most important thing Zion can do to assure campaign success?

Communication of Project Plans/Benefits (19):

- Inform congregation on all aspects of the project. ex. Financially, fundraisers, when or if it will be in progress. (14)
- Guarantee a new elevator and ramp.
- Have a clear message when talking to the congregation.
- Considering that there are not many large events happening at the church we should consider needing a large event space.
- The congregation needs to understand how this project can help our congregation grow and have a bigger impact on our church, community, and beyond.
- Better communication on the need to replace the office area as it is inefficient and not welcoming, and why current parsonage is not needed or desirable and is not as asset. Love the new plan as it addresses so many of our needs.

Fundraising Strategy (10):

- Contact all members personally to encourage the importance of their investment. (3)
- Have a team of enthusiastic, positive, and knowledgeable people for the fundraisers. (2)
- More fundraisers.
- Be open to suggestions and creative in fundraising.
- Use a positive approach where people feel committed about the future, rather than a feeling of obligation.
- I believe it will come down to 5 to 10 people. If those people are willing to support it financially with large investments, then the project will be feasible or not.
- Communication in a variety of ways – public meetings offered outside worship time (I do not believe this should be discussed at a 15–20-minute meeting/presentation during worship time), and offered at a variety of dates and times, Temple talks (brief updates, maybe weekly to reach all members), and in writing (CC, newsletter).

Congregational Support (6):

- Everyone's involvement. (3)
- Do what most people want, not just the few loudest ones.
- Need to have a special meeting/vote so all can hear and ask questions.
- Make sure members' comments, ideas, and input, are listened to and valued.

Cost Preparation (5):

- Be realistic with debt service.
- Need to have the money first.
- Let's not commit beyond reality.
- Budget has been a challenge for most of my years.
- Start with what we have, and little-by-little things can be added as money is available. We need to fix the elevator soon. Let it be the first project. The basement can be used as a large fellowship hall that we can afford.

Assessment of Campaign Timing

Assessment of Campaign Timing		Score	Weighted Rating	Best Possible
1*	Executive Director has been on the staff for a minimum of 24 months.	-	-	-
2	Your council is up to the full complement of membership which is allowable in your bylaws.	9.46	9.46	10.00
3	Council attendance during the past 18 months has averaged 80% or more.	9.23	27.69	30.00
4	There is whole-hearted agreement between the staff and council regarding the worthwhileness of the project, and they are willing to work together to bring the project to fruition.	9.08	72.64	80.00
5	The project meets a valid need.	9.31	74.48	80.00
6	The case for the program has emotional and dramatic appeal.	9.38	65.66	70.00
7	The organization has successfully raised its objective in its annual support campaign in the past two years.	9.15	45.75	50.00
8*	The organization has a challenging annual dollar objective in its annual campaign which forces it to stand on tiptoes to achieve its objectives.	-	-	-
9*	A general rule of thumb is that you will be able to raise 10 to 15 times the funds in a capital campaign that you have been raising annually.	-	-	-
10	The organization must have the ability to manage donor information.	9.62	9.62	10.00
11	In the past two years, you have operated within a balanced budget.	9.69	48.45	50.00
12*	You have prepared a carefully developed proforma budget and have projected that when the facility is completed, the project will generate sufficient income to make it self-supporting.	-	-	-
13	The council and staff have individually committed in an open meeting, with full discussion and verbal voting, their dedication to give and work sacrificially.	9.08	72.64	80.00
14*	The board is able to give individually (and corporately if it is a personal or family-held company) 10% of the campaign objective.	-	-	-
15	You are able to determine or identify the 20 major gifts that will produce 40% of your objective.	7.69	38.45	50.00
16*	You have identified and listed the 200 sources that are most likely to provide the largest gifts for your program.	-	-	-
17*	During the past 12 months, you have maintained a written plan to actively cultivate your top 200 sources and you have made significant contact with each at least twice during the year.	-	-	-
18	On your council, you have a person of sufficient strength, stature, influence, and affluence that he or she will be a desirable candidate to head your campaign.	9.08	54.48	60.00
19	You are able to identify someone of sufficient strength, stature, influence, and affluence who you feel will accept the chairmanship of your campaign program.	9.08	45.40	50.00
20	You will be able to recruit sufficient volunteers to mount a successful campaign effort.	8.77	26.31	30.00
21*	There should be no campaigns in your service area being planned for the same period which will cause a serious conflict.	-	-	-
Total		118.62	591.03	650.00
598-650		<i>92-100% of total possible</i>		
You are ready. What are you waiting for?				
540-598		<i>83-91% of total possible</i>		
You will almost certainly have a successful campaign. Take time to correct the few deficiencies				
455-539		<i>70-82% of total possible</i>		
You are close. You still have some work to do before you can be assured of success. Begin now				
455 and under		<i>Under 70% of total possible</i>		
You are not ready. You need to spend time improving the critical areas which will determine your				



ZION LUTHERAN
CHURCH

Feasibility Study

Case for Support



Feasibility Study Overview

Zion Lutheran Church is conducting a feasibility study to determine our congregation's desire and readiness to move forward with fundraising efforts for building enhancements that will offer greater accessibility and space for gathering and fellowship.

We have hired Maximizing Excellence, LLC, a local firm with extensive feasibility study and campaign experience to facilitate this process and prepare for fundraising efforts.

The Case for Support has been developed as part of the feasibility study process and is a test concept only at this point. A final project plan and campaign goal will be determined following the study and report recommendations being presented to the Zion Lutheran Church Feasibility Study Task Force in mid-February 2024.

The Holy Spirit calls us together as the people of God.

Each year over 250 households are served through the priority areas as identified by Zion Lutheran Church (Zion) and the Evangelical Lutheran Church in America (ELCA).

A Welcoming Church: Engaging new, young, and diverse people.

A Thriving Church: Rooted in tradition and radically relevant.

A Connected, Sustainable Church: Raising the bar together.

In 1891, the legacy of Zion began in the Garretson community and in 1953 the present church building was dedicated.



Zion has since continued to serve as a place of connection and has allowed generations of families to preserve their traditions and values, find fellowship and community, and continue to engage in their faith journey at all stages of life.

Faithful Stewardship

In 2003, the congregation determined a new elevator was needed. This essential building update served as the catalyst for the consideration of additional building improvements.

The Building Committee revisited needs in 2022 and began to explore the most efficient improvements to provide accessibility.

Through this process, the committee considered future building planning and performed due diligence to determine a plan that best honors fiscal responsibility, including the benefits of timely updates.

Congregation Survey Findings

When asked about satisfaction in several key areas of experience at Zion in a congregation survey taken in October of 2023, the following was found:

- The building was rated as the area of least satisfaction with a score of 3.5 out of 5.
- Accessibility to all areas of the church, regardless of physical capabilities was rated as the most important priority, at 4.5 out of 5.

A Campaign for Fellowship and Community

The building itself plays a vital role in fellowship. Updates to accessibility and additional space for congregational gathering will allow Zion to continue to stand as a place of connection in the community.

Proposed Capital Improvements

Main Level Fellowship Hall

The addition of a main level fellowship hall provides an easily accessible, welcoming space for the congregation to gather and for members of the growing community to seek connection, impacting the long-term sustainability of Zion.

Additional Space for Youth

The addition of a main level fellowship space, the current hall can be transformed into a dedicated space for youth gathering, supporting youth fellowship and creating excitement for the future of the church.

Space for Spiritual Guidance

Building updates will create adequate space for Pastor Corey to meet confidentially with members of the congregation and provide support at all stages of one's journey in faith.

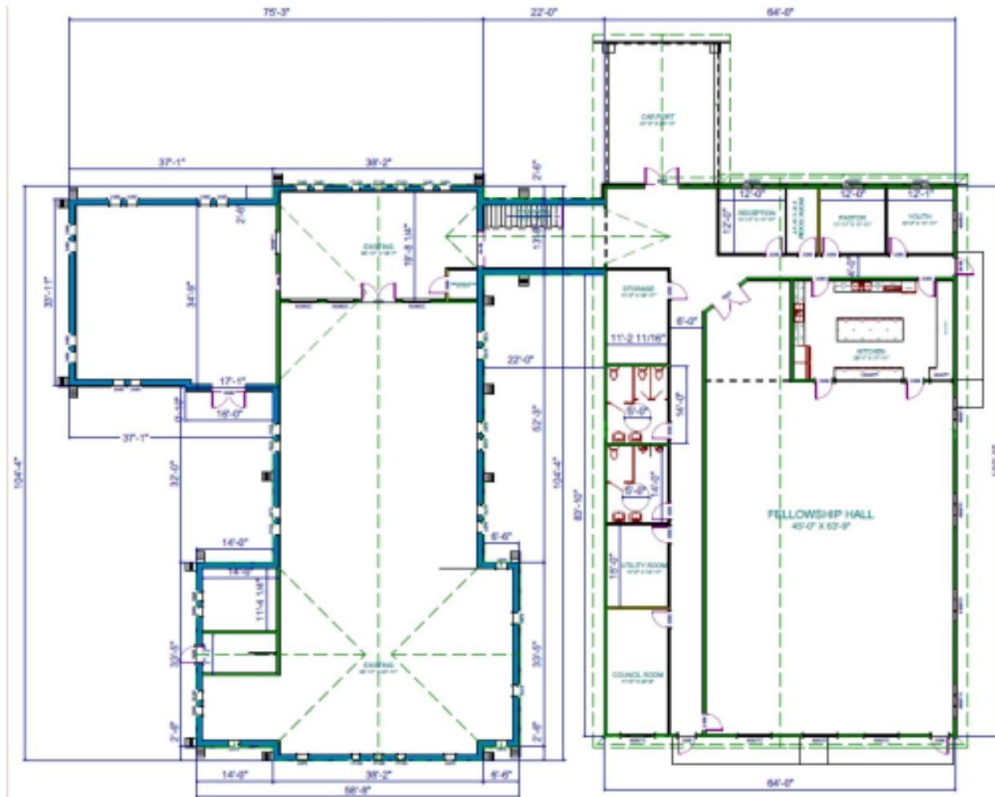
Accessibility

Replacement of the existing elevator and stairway will provide safe access to all levels of the building, regardless of physical limitations. Additionally, a main level fellowship hall provides same level access to this space for all members.

"Now faith is the assurance of things hoped for, the conviction of things not seen.."
Hebrews 11:1

Vision for the Future

It was determined that a one-time improvement project is substantially more cost effective than a two-phase approach, based on proximity of the updates within the building. Demolition would likely have to be duplicated in a two-phase approach, increasing labor and material costs.

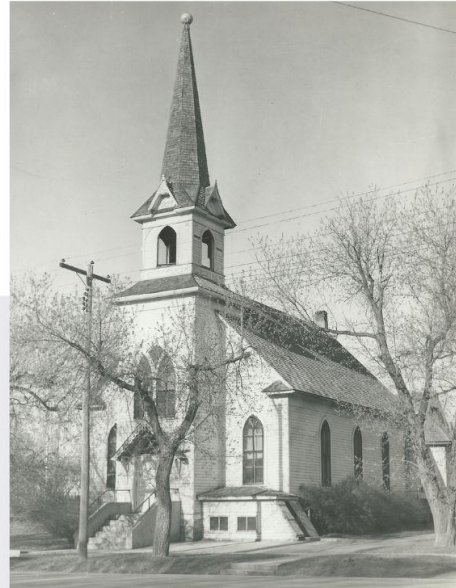


Interior layout is conceptual, pending feasibility study findings and final congregation approval.



Engaging in the Faith Journey

The investment in building updates serves as a pledge to the congregation and growing community that Zion continues to be committed to current members and those who are welcomed into the faith community. Like previous generations took a leap of faith on the current church building and growth, this is our leap of faith to show commitment to future generations of members.



A message of encouragement from Pastor Corey Scott

“Zion has endured through many challenges impacting how the congregation is called to support our ministries in the past 131 years. We have prevailed and the faithfulness and stories of generations past have led us to where we are today. As we continue to grow and to be a place of worship, inspiration, and encouragement for current and for future generations, our commitment to the faith journey will be shown in the fruits of Spirit within our children.”

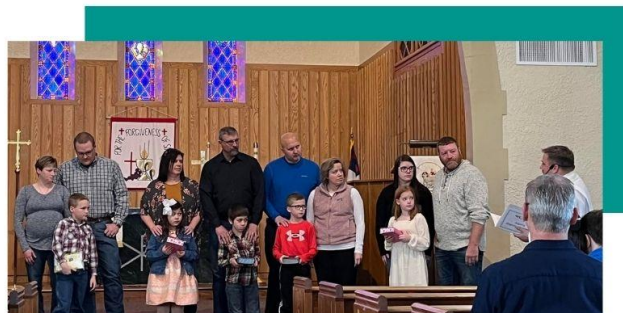
Honoring Traditions and Values

The traditions that are honored within the walls of Zion continue to be a pillar of strength in the community and for all generations of the congregation. Activities like Lenten suppers, lefse baking for the Fall Festival, and quilt making for missions around the world, bring together members and continue to instill the same values of those who have given of their time, talent, and treasure to the church for over a century.



Maintaining a connection to history and beliefs of both Zion as well as the ELCA are especially important, including activities such as quilt making, preparing lefse for the fall festival, presentation of bibles, and recognition of faith milestones.

A commitment to preserving the original building while modernizing accessibility gives opportunity for members to safely access all levels of the building and continue to take part in these deep-rooted traditions.



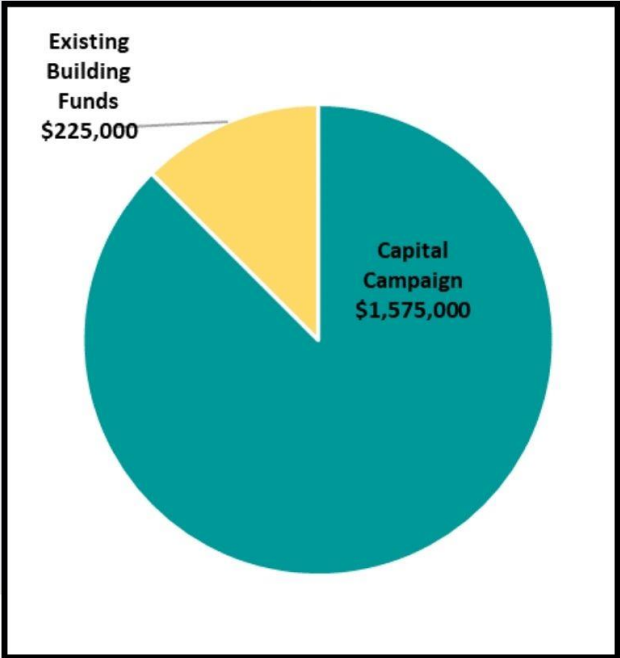
Capital Campaign Goal and Fundraising Plan

Capital Campaign Project Estimate: \$1.8 Million

Zion currently has \$224,533 in the building fund to support this project. These funds were given prior to recent efforts specifically to support the needed elevator upgrade.

Achieving the full vision is estimated to cost \$1.8 million and is made up of the following:

- Fellowship Hall addition
- Repurpose current fellowship hall space to be used for youth activities and education
- Accessibility updates
 - Stairwell
 - Elevator
 - Ground level entry
- Ground level canopy entrance
- Exterior parking lot improvements



Fundraising efforts will begin in 2024, pending feasibility study report and final congregation approval.

Gift Matrix

Zion Lutheran Church
\$1,800,000 Capital Campaign Gift Chart

GIFTS REQUIRED				
PROSPECTS	GIFTS	GIFT RANGE	Total	CUMULATIVE TOTAL
3	1	\$500,000	\$500,000	\$500,000
6	2	\$250,000	\$500,000	\$1,000,000
6	2	\$100,000	\$200,000	\$1,200,000
12	4	\$50,000	\$200,000	\$1,400,000
12	4	\$25,000	\$100,000	\$1,500,000
18	6	\$15,000	\$90,000	\$1,590,000
30	10	\$10,000	\$100,000	\$1,690,000
30	10	\$5,000	\$50,000	\$1,740,000
28	14	\$2,500	\$35,000	\$1,775,000
50	25	\$1,000	\$25,000	\$1,800,000
many	many	under \$1,000		
195+	75+			



Maximizing Excellence, LLC partners with organizations that want to improve their effectiveness and achieve high impact.