



PRE-CAPITAL CAMPAIGN
READINESS ASSESSMENT REPORT
FOR
*LOS ALTOS UNITED METHODIST
CHURCH*

Presented by Susan Peters, CFRE, Executive Director

California-Nevada United Methodist Foundation

May 5, 2010

Los Altos United Methodist Church
PRE-CAMPAIGN READINESS ASSESSMENT
INTERVIEW SUMMARY REPORT

Interviewers: Susan Peters and Betsy Schwarzentraub from the California-Nevada United Methodist Foundation

Number of Interviewees: 105

Dates of Interviews: April 9, 10, 11 and 16, 2010

Purpose of Readiness Assessment

To determine the level of support from the congregation of Los Altos United Methodist Church to conduct a capital campaign for Phase Two of the campus master plan.

Although the interviewees had differing opinions and ideas about various questions we asked, it is clear that all have in common a deep love for and commitment to Los Altos UMC. It was a joy to hear this expressed repeatedly throughout the interview process.

Responses About the Church

A great majority of those interviewed described Los Altos UMC as very active and welcoming to newcomers. Typical descriptive words used often were: dynamic, spiritually alive, inclusive, vibrant, progressive, and family-friendly. Interviewees noted the church's music programs, programs with children and youth, and far-away hands-on mission teams as things that LAUMC does extremely well. Several people also noted Pastor Mark's excellent sermons and the quality of worship services.

Overall morale of the congregation was seen by the majority as high to very high, and stable. This is one of the important positive indicators we look for in assessing a church's readiness for a capital campaign. When asked about issues that were concerns in terms of causing conflict in the congregation, about half of the interviewees mentioned the Children's Center workroom project, however, most were not directly involved but were aware that there are or had been difficulties.

As to areas that could be improved, approximately one quarter of the interviewees expressed a desire to develop a young adult ministry for people in the ages between high school graduation and when they may come back to the church as families with young children. Others were eager to develop a hands-on local mission to support the needs of the community immediately surrounding the LAUMC facilities. Communication and parking were also mentioned frequently as areas needing regular attention.

Another very positive indicator was the very strong support of the pastoral staff at LAUMC. This question received the highest score of all, with 100 of the 105 interviewees rating their support as good or strong. This is a higher score than we normally see in studies. High scores were also reflected in the belief of the congregation that the church has good financial controls in

place at this time. This is important in the level of confidence people have in entrusting gifts to the church.

Responses About Church Involvement

The persons we talked with showed a high level of involvement and commitment to Los Altos UMC through either current or past participation in church leadership, small group activities, music and youth programs, and mission trips. Most we spoke to attend at least 40 Sundays a year, and all were current financial givers to LAUMC, as well as other charities both locally and world-wide. These responses indicate that this congregation practices generosity in many ways.

There were also a significant percentage of respondents who said that the church is in their estate plan, nearly 1/3 of the families interviewed. This again is a very high percentage, demonstrating a level of trust in and commitment to LAUMC.

There were some concerns expressed over recent changes in the pastoral staff. These concerns included changes that have already happened, with little or no explanation offered for why they left. Some are also concerned about possible future pastoral changes with Dirk and Carol Damonte and Mark Bollwinkel. Either of such future possible changes might greatly affect the Phase Two capital campaign. The positive aspect of these feelings, however, shows the great respect and affection this congregation feels for the pastoral staff.

Responses About the Proposed Capital Campaign Project

We had almost as many questions in this section asked by the interviewees as we asked of them! Well over half of interviewees felt that their understanding of the proposed project was rated a 4 or 5, and all of those we had interviewed knew about the project. Also positive, 85 of the interviewees were in favor of the project. Many people raised the question of how this Phase Two proposal fits into the 2020 Vision Master Plan, and asked to see how all of the campaign stages would work together. A good case needs to be made for how ministry would expand through execution of Phase Two, including how the proposed buildings would enable the expanded ministries.

Half of interviewees mentioned the current economic situation as a concern in campaign timing, but most expressed the feeling that the recession is beginning to turn around.

Several people wondered whether there is growth in attendance and membership that warrants the addition of square footage and whether or not the number of participants supports expansion of space. At the same time, others asserted that LAUMC needs to plan for those who are not yet among us.

A number of interviewees asked where current ministries will be housed during the replacement period while construction is taking place. Thorough, consistent and ongoing communication from leaders and decision-makers will be vital for the entire congregation to keep in touch with what is happening and where the church is in its building process.

While understanding that these interviews were very preliminary to see how the congregation feels, people had several questions about the building as plans progress. There was interest in considering other space options, such as reconfiguration, remodeling and repair of what they

have, as well as other potential sites or other churches in the area that may be closed. Communication is vital related to all alternative space options that have already been considered or will be considered in the future. Yet even without this communication, a large number of people said that they trust the church leaders who are putting the Phase Two plans together.

Responses About Campaign Leadership

Thirty-five people were named as possible campaign leaders, with three or four names appearing frequently. Names representing different generations are included in the list.

Thirteen interviewees were willing to lead campaign committees, and 41 were willing to not lead but work on a committee. Sixteen respondents were willing to assist in asking people to consider making a gift. The names will be shared as the church moves forward into a capital campaign.

RECOMMENDATIONS

1. Develop a clear case for support of Phase Two in which the ministries come first and describe how the proposed buildings will support those ministries in the context of the 20/20 Vision plan.
2. Include the Children's Center workroom project in the overall Phase Two campaign, again in relation to the 20/20 Vision plan.
3. Conduct the capital campaign in the Spring of 2011.
4. Create and implement a clear communication plan that helps all parts of the congregation gain a solid understanding of Phase Two's purposes, projects and plans.
5. Select capital campaign co-chairs who represent different constituencies within the congregation.
6. Make the results of this Readiness Assessment available to the entire congregation

Campaign Financial Goals

We believe that the LAUMC congregation has within it the resources to raise \$6 to \$8 million over a 5-year pledge period. Based on annual giving records over the last few years, motivation will be the challenge for this campaign. A strong case for support based on the 20/20 Vision and dynamic leadership will be necessary to reach this amount. If the campaign were to be conducted today given the information gathered in our study, a minimum goal might be \$5 million.

We identified **\$1,735,500** in current support of Phase Two, including **four** lead gifts within the six- or seven-figure range. An additional \$1 million was given by interviewees to causes other than the church last year.

INTERVIEW COMPOSITE SUMMARY

Criterion	0 points	1 point	2 points	3 points	4 points	Score & %
Morale- # of responses (5)	poor	fair	OK	high	Very high	
Score	0	0	10	76	9	105
			20	228	36	284 65%
Trend- # of responses (6)	decline		stable		improving	
Score	9		57		25	101
	0		114		100	214 49%
Conflict- # of responses (7)	?	yes	no			
Score	4	52	47			103
	0	52	94			146 66%
Pastoral Support -# of responses (8)	No	Reluctant	Okay	Good	Strong	
Score	1	1	3	9	91	105
	0	1	6	27	364	398 95%
Financial Controls- # of responses (10)	?	no	yes			
Score	6	3	96			105
	0	3	192			175 89%
Personal Understanding- # of responses (18)	Not at all	Heard of	Avg.	Reasonably	Thorough	
Score		9	29	39	32	99
		9	58	117	128	312 71%

Criterion	0 points	1 point	2 points	3 points	4 points	Score & %
Personal Support of project- # of responses (19)	Oppose 5	Neutral 9	OK 7	Favor 40	Strongly 44	105
Score	0	9	14	120	176	319 76%
Timing Concerns - # of responses(22)	?	yes 57	no 45			102
Score		57	90			147 67%
Reasonable Amount- # of responses (23)	no 5	reservations 6	Little high 11	probably 48	absolutely 30	100
Score	0	6	22	132	120	280 64%
Faith in Figures? -# of responses (24)	? 54	No 20	Yes 28			102
Score	0	20	56			76 35%
Able to Raise Amount- # of responses (25)	? 24	No 4	Yes 76			104
Score	0	4	152			156 71%

Criterion	0 points	1 point	2 points	3 points	4 points	Score & %
Personally Favor a campaign?- # of responses(26)	?	No	Yes			
	6	12	73			91
Score	0	12	146			158 72%
Willing to Lead - # of responses (31)	Not sure	No	Yes			
	5	75	15			95
Score	0	75	30			105 48%
Willing to Work- # of responses (32)	Not sure	No	Yes			
	19	36	41			96
Score	0	36	82			118 54%
Possibility of Leadership Gifts -# of responses (20)					25	25
Score					100	100 23%
Leaders Suggested - # of responses (34)					37	37
Score					148	148 35%

4 point maximum questions have a maximum score of 420 (4 x 105 interviewed)

3 point maximum questions have a maximum score of 315 (3 x 105 interviewed)

2 point maximum questions have a maximum score of 210 (2 x 105 interviewed)

CAPITAL CAMPAIGN READINESS SCORING

- 1. # of interviews = 105**
- 2. 100% value = 5040**
- 3. Study total = 3136**
- 4. % total value = 62%**

OVERALL PROBABILITY OF SUCCESS-SCALE

TOTAL SCORE CLOSET TO % INDICATED

100%	Success guaranteed
70%	High probability of success
60%	Typical success probability
50%	Success with specific preparation
40%	Questionable success
30%	Not ready, probably fail
20%	NO GO Guaranteed failure