

DDG Development Committee + Report to Board + October 27, 2014

Development Committee:

Todd Ousley, Eastern Michigan (Chair)
Scott Mayer, Northwest Texas
Ed Miller, Virginia
Beth Drew, Western Michigan
Sally Thompson, Southwest Florida
Bob Snow, Nebraska
Julia Arial, Georgia
Julius Arial, Georgia
Bill Kunkle, DDG Executive Director

Notes from February 17, 2014 Development Committee Meeting

Goal: Raise \$1.25 million US for DR Endowment

Immediate Needs:

1. Database development --- current estimate is a database of 1750 persons per Bill Kunkle
2. Data Mining from our own sources and other sources

Next Steps:

1. Case Statement Development with points to consider:
 - a. Growth and Vitality of DR Diocese
 - b. Strength of social & education ministries
 - c. Province IX Sustainability plan
 - d. DR as the leader in Province IX sustainability
 - e. DR as model for sustainability efforts in US domestic dioceses
 - f. DR diocesan efforts to grow endowment, including sell of Bishop's Residence with ½(?) of proceeds going to Endowment
2. Contact Episcopal Church Foundation (TEC Development Office?) for assistance with:
 - a. Strategic Development Plan
 - b. Endowment Campaign Planning
 - c. Planned Giving Plan
3. Identify Constituencies:
 - a. Companion Dioceses
 - b. Bishops of Companion Dioceses
 - c. DDG Partners
 - d. TEC "Vacationers" in DR
4. FOCA/DR Liaison to Development Committee and Endowment Campaign needs to be identified
5. Draft Case Statement & Development Plan to be forwarded to Committee by April 1, 2014 for review and refinement [This did not happen. Responsibility tasked to Todd Ousley but not accomplished]

Other:

1. Utilize the tremendous leadership of Bishop Holguin and church-wide desire to honor his service as leverage in campaign
2. Beth & George Drew have offered their retreat house (including dinner for 1-night) as an auction item to benefit DR Project or DR Endowment, with priority given to Endowment Campaign
3. Existing Database of 1750 persons = \$715/person to reach goal of \$1.25 million

Report for 2014 Mid-Year Mtg + October 27, 2014 + Detroit, Michigan

Development Committee has not met since DDG Board Mtg in Santo Domingo on 2/27/2014

Contact has been made with Jim Murphy, Managing Program Director of Financial Resources for the Episcopal Church Foundation (ECF) to determine possibility for consulting on an endowment campaign. In order to proceed, we need the following:

1. Completion of ECF's Infrastructure Review for Diocesan Campaigns (attached)
2. Clarification on amount to raise:
 - a. \$1.25 million plus \$1 million from The Episcopal Church (TEC) into FOCA (DR Endowment Fund) to reach \$8 million in FOCA **or**
 - b. \$2.25 million into FOCA to reach \$8 million with up to \$1 million from TEC used to replace annual TEC subsidies over the course of the campaign
3. Website revisions and consistency between documents/statements
4. Necessary authorizations to proceed with contractual negotiations with ECF
5. Clarification of relationship between DDG and DR Diocese regarding management of campaign and actual recipient of funds as well as expectations regarding distribution of endowment funds raised



Infrastructure Review for Diocesan Campaigns

Name of Diocese: _____
 Diocesan-wide: ASA: _____
 Annual operating budget: _____
 Total endowment or reserve funds: _____

- 1- Database: Please indicate the approximate number of entries under each category:
 - a. mailing addresses: _____
 - b. email addresses: _____
 - c. donor records: _____
 - d. Can you sort these records by donor level? ___ yes; ___ no
 - e. By parish? ___ yes; ___ no
 - f. By leadership roles? ___ yes; ___ no
 - g. Do all diocesan entities use the same database system? _____

- 2- Communication: please check any communications outlets you already use and the approximate number of people each outlet reaches.
 - a. Newsletter: _____ number mailed; _____ times per year
 - b. E-newsletter: _____ number sent; _____ times per month
 - c. Website: _____ hits per month
 - d. Videos: _____ parked on website; _____ embedded in e-news
 - e. Blog: _____ hits per month; _____ addresses notified
 - f. Other (describe): _____

- 3- Networking and Leadership: Which of the following networks are operating in your diocese?

___ Deanery/convocation meetings of clergy; how often do they meet?
 ___ Advisory committee such as Bishops Associates or other advisory board?
 How often do they meet?
 Rank the membership roughly in order of predominance, 1 being the highest percentage of the membership, 4 being the lowest percentage

___ Rectors and vicars
 ___ Wardens & parish leaders
 ___ Diocesan committee members
 ___ Donors and potential donors

- 4- Diocesan funding:
 - a. Diocesan budget is entirely supported by askings/assessments. ___ yes ___ no
 - b. If no, what other sources of income do you depend on?

___ Endowment income
 ___ Property rental/usage fees
 ___ Annual giving appeals (see below)
 ___ Other (please describe): _____

- c. Askings/assessments are _____ voluntary; _____ required (includes loss of standing for voluntary askings that are not met)

5- Annual Giving: Does the diocese send regular fundraising appeals to:

- Supplement operating expenses?
 ___ yes; ___ no; _____ amount raised; _____ approx. number of donors
 - Support specific ministries or mission projects?
 ___ yes; ___ no; _____ amount raised; _____ approx. number of donors
- Are these donors recorded in the diocesan database? ___ yes; ___ no

6- Planned Giving & Endowment

- a. Size of endowment: _____
- b. Percentage draw from endowment: _____
- c. Endowment draw supports (if more than one, indicate roughly what percentage goes to each):
 - ___ operating expenses
 - ___ special ministries
 - ___ capital projects such as plant replacement
 - ___ other. Please describe:
- d. Do you have a legacy society? ___ yes; ___ no
- e. Planned giving communications in the diocese include (check all that apply):
 - ___ something in each newsletter
 - ___ something 2-4 times/year in regular newsletter
 - ___ a designated page/area of our website
 - ___ special communications to targeted prospects. Please indicate frequency:
 - ___ legacy society gatherings. Indicate frequency:
 - ___ other. Please describe:
 - ___ we have no planned giving program