Churchgrants 20 Minute Masterclass

PLANNING A CAPITAL PROJECT
Welcome

- **Introduce yourselves**
- Use the chat box below to say hello and for general comments to all participants

- **Questions to our panelists**
- Please use the Q&A box at the bottom of your screen to ask your question

- **Slides and Video**
- This session is being recorded and the video will be available along with the slides at https://www.london.anglican.org/kb/request-fundraising-information/
Who are we?

- **Matthew Lagden, MInstF**
  - CEO of the Institute of Legacy Management

- **Andrew Clark, MInstF Cert**
  - Managing Director of Apostle Charity Consulting
What you will learn today

The right order in which to approach a capital project

Who can help you and when to ask them

The key things you need to get right at each stage
Before you begin

PREPARE YOURSELF SPIRITUALLY
PREPARE YOUR COMMUNITY
IDENTIFY TALENTS AND SKILLS GAPS
GET STRUCTURES IN PLACE TO SUPPORT YOU
What do you want to achieve and why?

What are the needs and issues your church faces?

What are the needs and issues your community faces?

Is a capital project the right way to solve them?

How will the capital project solve them?
Design scheme and permissions

<table>
<thead>
<tr>
<th>Start</th>
<th>Open</th>
<th>List</th>
<th>Identify</th>
<th>Write</th>
<th>Find</th>
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<tbody>
<tr>
<td>• Start with your Quinquennial Inspection (QI) – get a new one if needed</td>
<td>• Open the dialogue with Parish Property Support</td>
<td>• List the problems you are trying to solve (internal and external)</td>
<td>• Identify how changes to your building can solve the problems</td>
<td>• Write a ‘statement of significance and needs’ and architect briefing</td>
<td>• Find an architect you trust and commission them</td>
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Helpful Resources

- **Crossing the threshold**
  - [https://www.hereford.anglican.org/Crossingthethresholdtoolkit/](https://www.hereford.anglican.org/Crossingthethresholdtoolkit/)

- **Community Audits**
  - [https://www.london.anglican.org/kb/community-audits/](https://www.london.anglican.org/kb/community-audits/)

- **Statement of Significance and needs**
Budgeting and planning to fundraise

- Realistic, robust budget
- Commission a quantity surveyor
- Assess church’s fundraising experience and capacity
- Identify and assess all possible sources of support
- Do a ‘contacts audit’
- Estimate how much you can raise from each source
- Is it enough? If not, go back to your budget
- Appoint a member of your church to take the lead

Developing a realistic, robust budget is the single most important thing you can do.
Implementing your fundraising campaign

**Stage one**
raising your fighting fund – ensure that you have enough money to fund your project costs – architects, surveyors etc – no one else is going to fund it

**Stage two**
raising your contribution to the project – most funders will want to see that you are contributing to the project – at least 10% and as close to 50% as you can get

**Stage three**
raising funds from external sources – once you have hit your threshold go out to all external sources simultaneously

**Stage four**
the final heave – once you know how much you have raised from external sources, go back to your church community and ask them to give and raise the rest
Remember

► Every aspect of your plan will change – that’s okay! Keep revisiting it.

► Unexpected avenues will open up – follow them wherever they lead.

"If you do not expect the unexpected you will not find it, for it is not to be reached by search or trail."

• Heraclitus •
Seven steps of fundraising

1. Identify your prospects
2. Research them (legally)
3. Plan: when and how will you approach them?
4. Engage: Start a conversation with them.
5. Ask: The ask should be made by the most senior person
6. Confirm: Get it in writing!
7. Thank: Promptly, personally and repeatedly

Donors who are thanked properly give again, donors who aren’t, don’t!
Any questions?

USE THE Q&A BUTTON AT THE BOTTOM OF YOUR SCREEN TO ASK A QUESTION
Good luck!

- **Diocese of London Parish Property Support**
  - [https://www.london.anglican.org/support/buildings-and-property/](https://www.london.anglican.org/support/buildings-and-property/)

- **Church Grants (subscription paid by Diocese of London)**
  - [https://london.churchgrants.co.uk/](https://london.churchgrants.co.uk/)

- **Parish Fundraising Support**
  - [https://www.london.anglican.org/support/fundraising/](https://www.london.anglican.org/support/fundraising/)