

**ITEM P.102  
FOR ACTION**

FOR PRESBYTERIAN MISSION AGENCY EXECUTIVE DIRECTOR'S OFFICE USE ONLY					
A. Resource Allocation & Stewardship	X	D. Coordinating Committee	X	G. Outreach to the World	
B. Personnel & Nominating		E. Mid-Councils		H. Ministerial Teams	
C. Property/Legal		F. Nurture the Body		P. Plenary	

**Subject: Stony Point Capital Campaign Feasibility Study**

**Recommendation:**

Recognizing that we are in the midst of an unprecedented pandemic which causes us to proceed carefully regarding our next steps, the Presbyterian Mission Agency Board authorizes the President/Executive Director of the Presbyterian Mission Agency to:

- 1) Implement a focused exploratory planning phase for a multi-year national campaign, with a Northeast regional focus, that has a preliminary working goal of \$4,000,000 plus a campaign budget. A progress report will be presented to each meeting of the Presbyterian Mission Agency Board prior to launching the campaign.
- 2) During the exploratory planning phase:
  - a. Evaluate the work of CCS. Determine and engage fund-raising counsel for the preliminary exploratory planning phase.
  - b. Establish a clear plan for the campaign in order to develop a more specific, actionable, and compelling Case for Support.
  - c. Engage strong volunteer campaign leadership with an emphasis on a diverse group of individuals who have the interest and capacity to open doors to gifts for Stony Point.
  - d. Create a campaign budget, including administrative costs (which would cover campaign counsel, staffing requirements and writing and design of materials, etc.)
  - e. Enact initial Matthew 25 programming at SPC before going public with the campaign.
  - f. Write a gift acceptance policy for this campaign, to be approved by the PMA Board.
  - g. Empower PMA and SPC staff to serve as champions of this effort.
  - h. Begin cultivating core relationships with lead prospects.
  - i. Develop a comprehensive communication plan to build awareness in the PC(USA) about SPC and the campaign.
  - j. Develop a plan for launching the public campaign following the exploratory planning phase.
- 3) Approve the following priorities for the campaign as recommended by Run River:
  - a. Private bathrooms in lodges
  - b. Solar power
  - c. Landscaping

**PRESBYTERIAN MISSION AGENCY BOARD**

**April 15-17, 2020**

**Stony Point Roundtable**

- d. Other facility upgrades, for example: window replacement, keycards, commercial laundry, etc.**
- e. Evergreen enhancements (administration, conference and dining spaces)**

**Background:**

See the attached Campaign Planning Study Final Report from CCS Fundraising.



# Presbyterian Mission Agency Campaign Planning Study Final Report

PMA Board of Directors Meeting

April 17, 2020



# Objectives and Materials

## Study Objectives

- Conduct 60+ discussions with PMA Board members, SPC Advisory Board members, mid-council leaders, pastors, donors, PMA and SPC staff, and other core stakeholders;
- Test the feasibility of securing \$10,000,000 in private philanthropic support;
- Identify candidates for campaign leadership positions;
- Identify potential major gift prospects;
- Assess perceptions of the Preliminary Case for Support; and
- Develop a preliminary Campaign Plan and timetable based on our findings.



## Study Materials

- Strategic Discussion Request Letter
- Preliminary Case for Support
- Discussion Prompt
- Discussion Candidate List
- Table of Gifts
- Campaign Organizational Chart
- Thank You Letters

# Campaign Planning Study Participants

## PMA Board Members (12)

Cecil Corbett  
Kenneth Godshall\*  
Lindsay Harren-Lewis\*  
Sinthia Hernandez-Diaz  
Jeffery Joe  
Kevin Johnson  
Kathy Maurer  
Patsy Smith  
Brenton Thompson  
Shannan Vance-Ocampo\*  
Susan Wonderland\*  
Nicholas Yoda

## Former PMA Board Members (1)

Kathy Trott\*

## PMA Staff (8)

Susan Barnett  
Rob Fohr  
Brian Frick  
Ray Jones  
Laurie Kraus  
Sara Lisherness  
Rosemary Mitchell  
Diane Moffett

## PMA Friends and Supporters (18)

Sandawna Ashley\*  
Amantha Barbee\*  
Jan Beran  
Bob Bohl  
Areta Crowell

## PMA Friends and Supporters con. (18)

William Dent  
Joy Dorf  
Chip Hardwick  
Mark Hostetter  
Andy James  
Doug King  
Don and Carol Mead  
Sharon Parker  
Ron Ridgeway  
Ruth Santana-Grace\*  
Dr. Doris Schoon  
Nicole Stansifer  
Hodari Williams\*

## SPC Staff Members (4)

Anissa New-Walker  
Paula Sandusky  
Kitty Ufford-Chase  
Rick Ufford-Chase

## SPC Volunteers (4)

Joyce Bressler  
Rabia Harris  
Sarah Henkel  
*Jane MacDonald\**

## SPC Friends and Supporters (22)

Maud Bartlett  
*Emily Brewer*  
Don Byers\*  
Kimberly Chastain  
Dave Davis

## SPC Friends and Supporters con. (22)

Susan DeGeorge and Kathy Dean  
*Michael Feinberg*  
Bob Foltz-Morrison  
Duna Fullerton  
Norman and Laura Gottwald  
Alice Hageman  
*David Haight\**  
*Mark Johnson\**  
Judy Lee  
Helene Loper  
*William McClintock*  
Deb Milcarek  
Roger Powers  
Cass Shaw  
Susan Smith  
Amaury Tañón-Santos  
Peggy Thomas

**Goal: 60+ discussions**

**Total: 69 discussions**

**Total E-Survey Responses: 25**

**\*Campaign Planning Study Committee Member**

***Member of SPC's Advisory Board (Present or Former)***

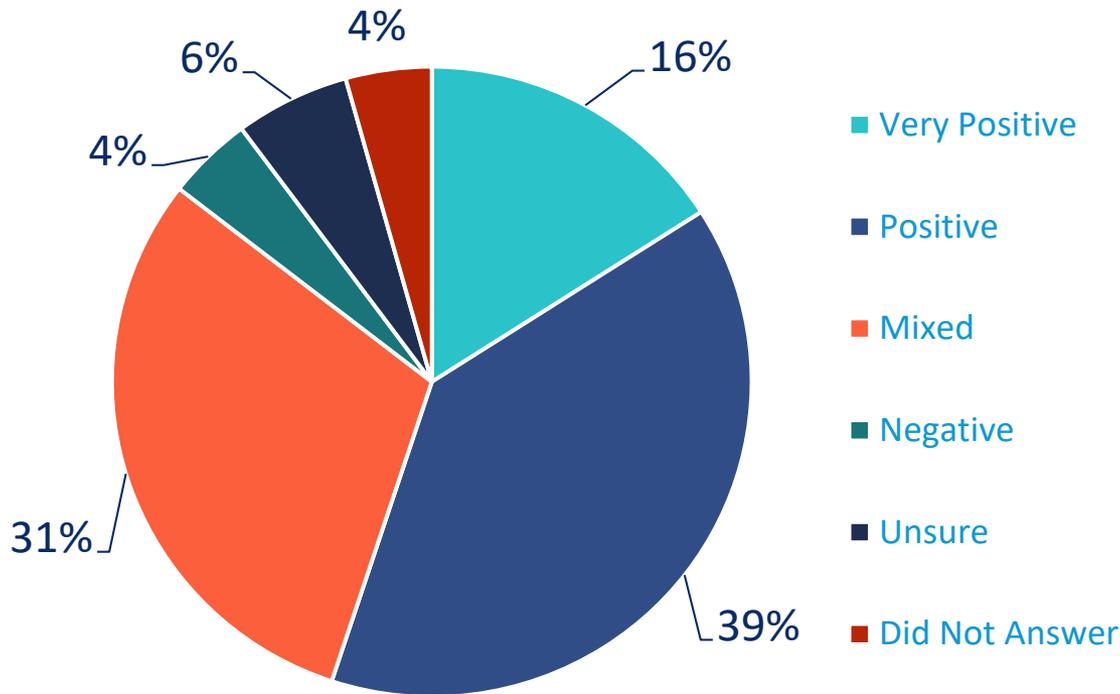
# Executive Overview

- The leadership of Diane Moffett, the high-quality programs and ministries, and its mission and vision were the most frequently cited strengths of PMA; however, due to its history just over half of participants (55%) had a positive perception of PMA.
- Reactions to the Preliminary Case for Support were positive, and numerous participants were interested in further specifics and details.
- Participants see improving buildings and grounds and supporting the mission and vision as two interconnected, equally important case elements.
- 80% of participants support moving forward with a campaign at this time.
- Approximately half of participants (49%) were unsure of the \$10,000,000 philanthropic goal, while 36% thought the goal was feasible.
- 86% of participants would give a gift to a campaign; however, only 30% would considering being a volunteer leader. Slightly more (38%) would consider serving on a committee.
- CCS recommends moving forward with a preliminary working goal of \$4,000,000 following a focused planning phase.
- During this planning period, it is essential to define a clear vision for the campaign and build core relationships with congregations, presbyteries, synods, and donors through targeted cultivation and stewardship. PMA should develop a comprehensive communication plan and implement Matthew 25 programming at SPC before the campaign's public launch.

# Findings

# Perceptions

*What is your overall perception of PMA?*



Note:

*CCS' benchmarking data of other retreat centers indicates that, on average, 83% of participants have a positive or very positive view of the organization undertaking the campaign.*

*"When I think of PMA, I get excited!"* – PMA Friend and Supporter

*"Ministries without mission are worthless. PMA ensures that the church walks the walk."* – PMA Board Member

*"I am nervous and frustrated about the current situation at PMA. The people who are knowledgeable of the organization's inner workings are holding their breath, but we are giving PMA the benefit of the doubt."* – PMA Friend and Supporter

# Strengths and Challenges of PMA

Top Strengths	Times Cited
Leadership of Diane Moffett	24
Ministries and programs	22
Mission and vision	15
Personnel	11
Supporting SPC	9
Matthew 25	8

*“Diane Moffett is a person of vision, and she is focused on the right things.”*

– PMA Friend and Supporter

*“PMA is a leader in the church’s themes. Its programs allow those themes to be put into action.”*

– SPC Friend and Supporter

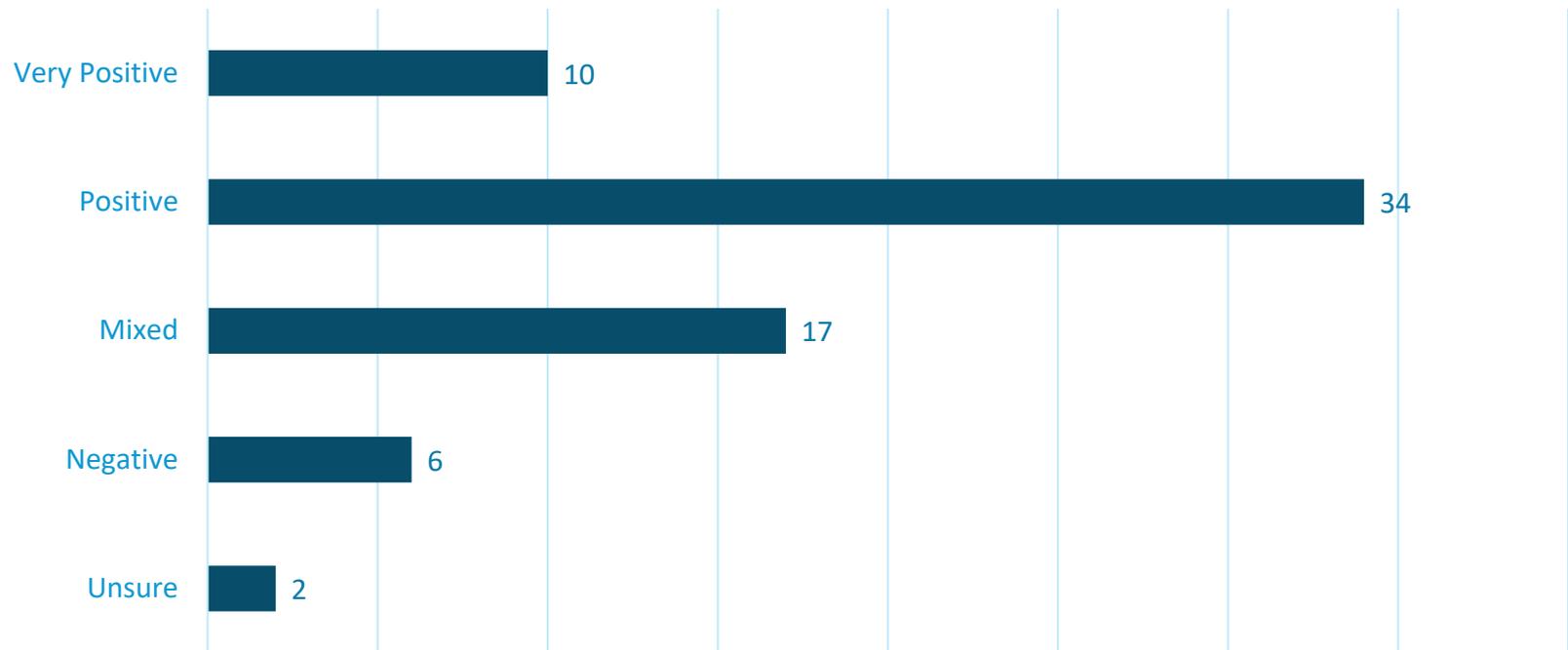
Top Challenges	Times Cited
Communicating their work	20
Funding	18
Declining membership	15
Adapting to current times	11
Connecting with the larger church	10
Bureaucratic	7

*“Most people in the pews don’t know about PMA.”*

– PMA Friend and Supporter

*“Money, money, money.”*  
– PMA Friend and Supporter

# Reactions to the Preliminary Case for Support



*“This campaign is the culmination of our blood, sweat, and tears. The Preliminary Case for Support invigorates and excites.”* – SPC Staff Member

*“Stony Point is a real gem. It has tremendous potential and could do ten times more than what it is doing right now.”* – SPC Friend and Supporter

*“Why Stony Point? Why is this the place that we are going to bring the church?”* – PMA Friend and Supporter

# Evaluation of Campaign Priorities

	Highest	High	Medium	Low	Unsure
Improving Buildings and Grounds	52%	37%	9%	2%	0%
Supporting Mission and Vision	27%	45%	14%	14%	0%
Establishing an Endowment Fund	11%	30%	43%	16%	0%

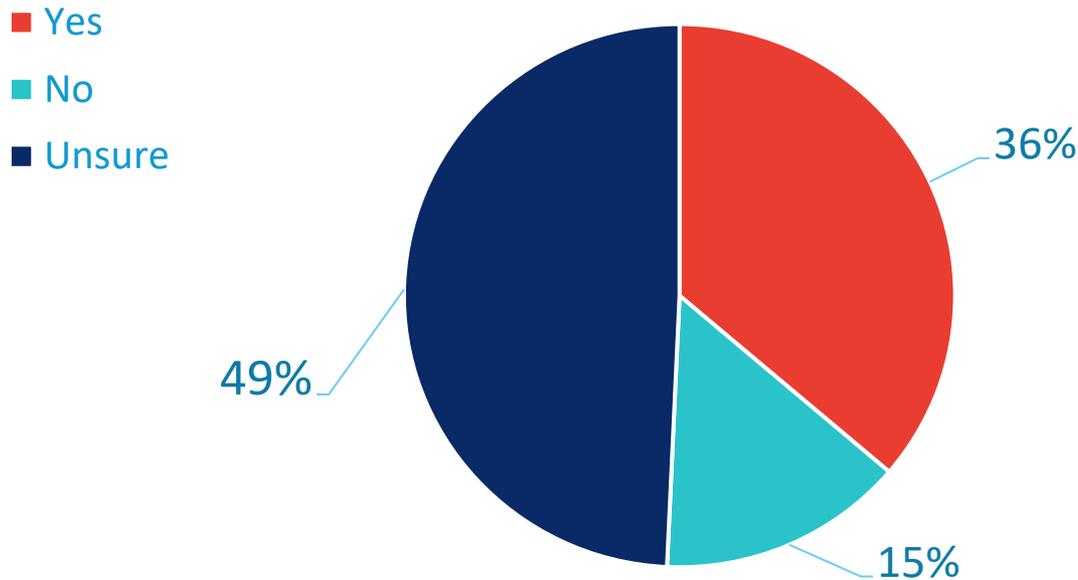
*“SPC has to be welcoming to people of the twenty-first century.” – PMA Board Member*

*“We should focus on programs, mission, and vision first; the buildings are merely a tool to achieve the mission and vision.” – PMA Staff Member*

*“You can have great content, but if you are freezing or walking to the bathroom, it colors the experience.” – PMA Staff Member*

*“Improving Buildings and Grounds and Supporting Mission and Vision are interdependent.” – SPC Friend and Supporter*

# Feasibility of Proposed \$10,000,000 Goal



*Note: In other CCS studies at retreat centers, on average, 42% of participants believed the proposed goal was achievable.*

In general, participants believe that Presbyterians have the capacity to fund this campaign, but they question the church's level of commitment to SPC. However, several mentioned that they suspected commitment levels would be higher in the Northeast. It is also important to note that SPC supporters were not thought to have sufficient funds to fund this campaign on their own.

*"I know the money is out there, but I wonder if SPC is well-known enough nationally." – PMA Staff Member*

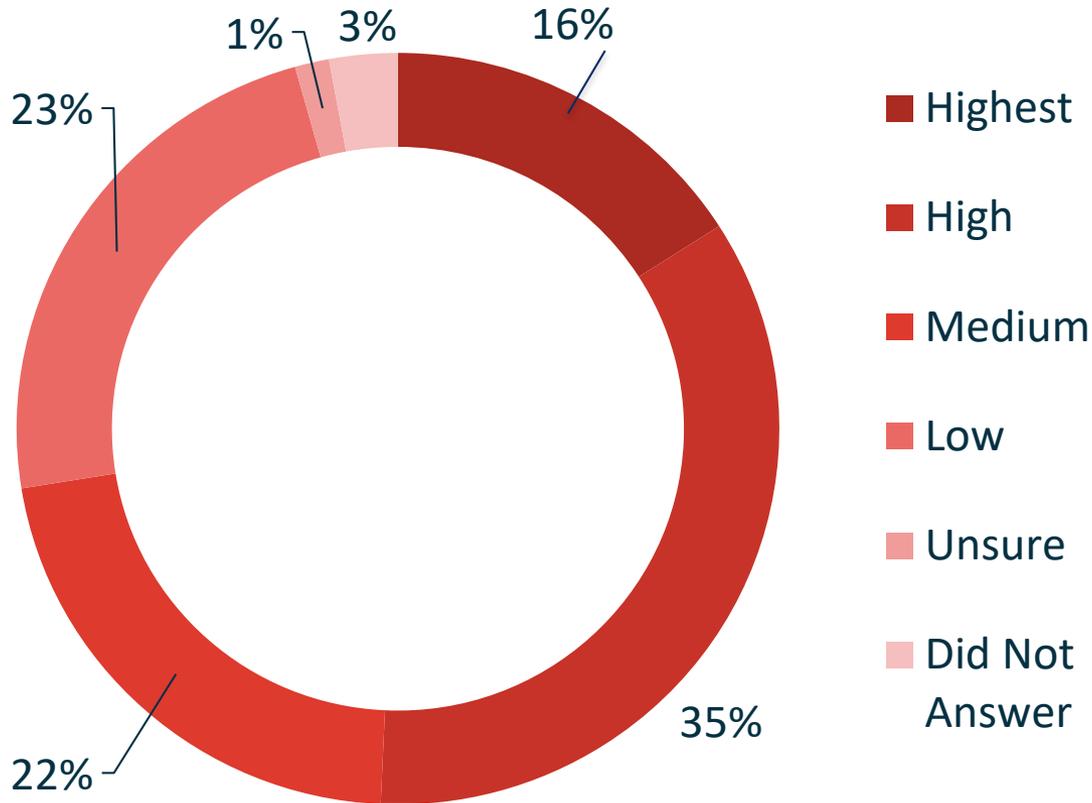
*"There is a lot of money in the Presbyterian Church, especially in New England. We just need to get the right people to buy into the vision."  
– PMA Board Member*

# Preliminary Gift Indications: Discussions & E-Survey Combined

Gift Range	Number	Cumulative Total/Low	Mid / Exact Range Total	Cumulative Total/High
\$2,500,000+	-	-	-	-
\$1,000,000 - \$2,499,999	-	-	-	-
\$500,000 - \$999,999	1	\$500,000	\$750,000	\$1,000,000
\$250,000 - \$499,999	-	-	-	-
\$100,000 - \$249,999	2	\$200,000	\$275,000	\$350,000
\$50,000 - \$99,999	2	\$100,000	\$125,000	\$150,000
\$25,000 - \$49,999	10	\$235,000	\$305,000	\$375,000
\$10,000 - \$24,999	10	\$102,500	\$140,000	\$177,500
Below \$10,000	43	\$58,350	\$138,825	\$229,300
Subtotal of Gift Indications	68	\$1,195,850	\$1,733,825	\$2,281,800
No Gift Indication Offered (but indicated that they would give a gift)	14	-	-	-
<b>Total</b>	<b>82</b>	<b>\$1,195,850</b>	<b>\$1,733,825</b>	<b>\$2,281,800</b>

# PMA as a Philanthropic Priority

*On your own personal list of philanthropic priorities, where does PMA rank?*

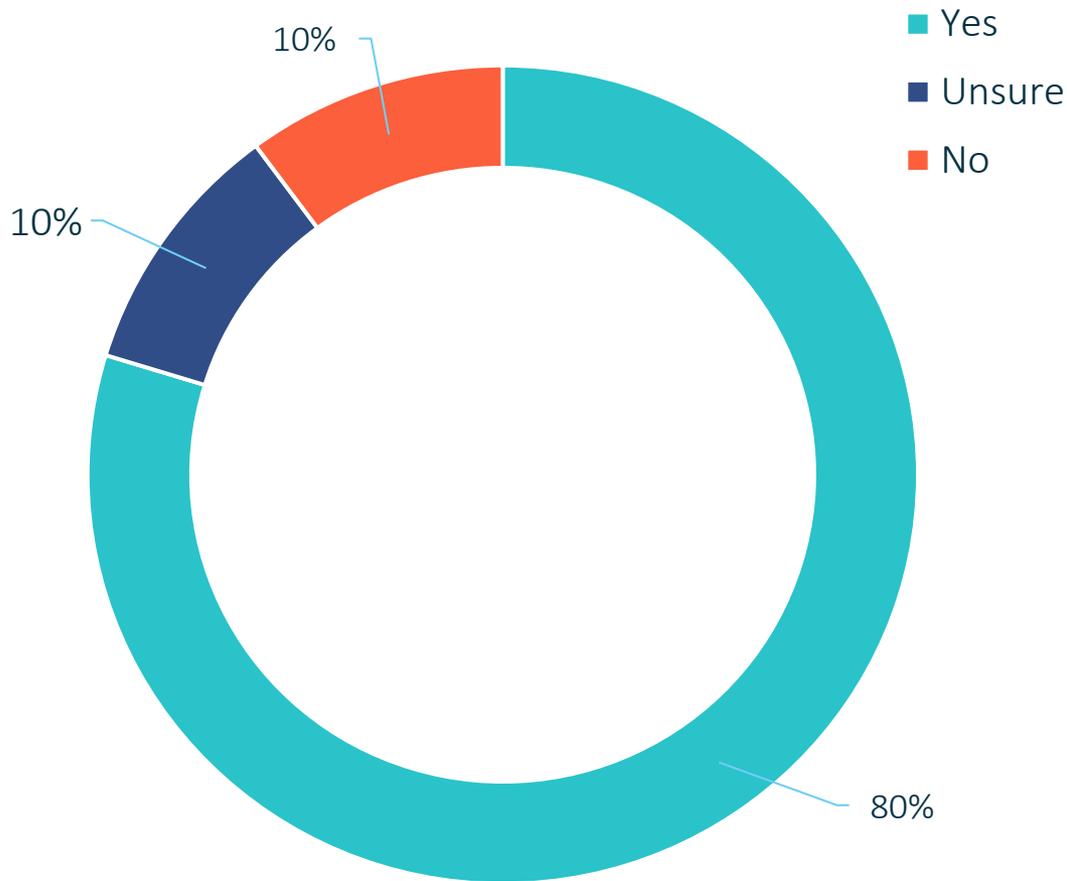


While many participants explained that their local church is their highest philanthropic priority, 51% of participants cited PMA as either their highest or a high philanthropic priority.

In other CCS studies at retreat centers, on average, 41% of participants cited the retreat center as either their highest or a high philanthropic priority.

*"I feel confident that when I have directed my personal funds and energy to PMA that it has been worthwhile." – PMA Friend and Supporter*

# Is This the Right Time For a Campaign?



*“We need to do something very soon or else the facilities are going to fall apart.”*  
– PMA Staff Member

*“We are in a moment in the country when we need to see more hope in the world. SPC has impact.”*  
– PMA Board Member

*“Everyday that goes by is a lost opportunity for better ministry.”*  
– PMA Friend and Supporter

# Potential Obstacles to Success

Potential Obstacles	Times Cited
Not having a clear vision	13 (19%)
Lack of leadership gifts	9 (13%)
Geography	8 (12%)

- *“If we don’t make it clear why we need it, that would be an obstacle.” – PMA Friend and Supporter*
- *“The people who love Stony Point do not have a lot of money. There is a disconnect between their values and money.” – PMA Staff Member*
- *“From where we are on the West Coast, SPC almost seems irrelevant. It is a full day to get there and a full day to get back.” – PMA Friend and Supporter*

# Willingness to Engage Compared to Other Retreat Centers

Response / Willingness to Engage	PMA	Retreat Center A (Virginia, 2016)	Retreat Center B (Maryland, 2015)	Retreat Center C (Maryland, 2011)
Positive about Preliminary Case for Support	64%	83%	78%	86%
Will serve as a volunteer leader*	30%	57%	43%	40%
Will serve on a committee*	38%	81%	75%	50%
Will request gifts*	59%	70%	58%	54%
Will open new doors for PMA*	74%	-	88%	69%
Will consider a gift to the campaign*	86%	93%	66%	91%
Conduct the campaign now?	80%	88%	83%	83%

\* Includes "Yes" and "Maybe" responses.

# Further Benchmarking

Fundraising Efforts	<b>PMA</b>	Retreat Center A (Virginia, 2016)	Retreat Center B* (Maryland, 2015)	Retreat Center C** (Maryland, 2011)
Amount Tested	<b>\$10,000,000</b>	\$5,000,000	\$5,000,000	\$5,000,000
Amount Recommended	<b>\$4,000,000</b>	\$2,000,000 - \$2,500,000	\$3,500,000	\$4,000,000
Amount Raised	-	\$3,100,000	\$3,681,000 – \$4,731,000	\$3,155,798 – \$3,479,789
% of Goal Raised	-	124% - 155%	105% - 135%	79% - 87%

\* Amount Raised and % of Goal Raised are estimates as of last point of CCS engagement, 6 months into a 24 month campaign.

\*\* Amount Raised and % of Goal Raised are estimates as of last point of CCS engagement, 9 months into a 12 month campaign.

# Recommendations

# Overview of Recommendations

- 1) Implement a national campaign, but with a Northeast regional focus, that has a preliminary working goal of \$4,000,000 following a focused planning phase.
- 2) During the planning period:
  - 1) Establish a clear vision for the campaign in order to develop a more specific, actionable, and compelling Case for Support.
  - 2) Engage strong volunteer leadership in the campaign with an emphasis on diversity and individuals from the Northeast.
  - 3) Empower PMA and SPC staff to serve as champions of this effort.
  - 4) Begin cultivating core relationships with lead prospects.
- 3) Adopt a sequential approach: focus first on core stakeholders, major donors, and then the Northeast before expanding to the broader PC(USA).
- 4) Develop a comprehensive communication plan to build awareness in the PC(USA) about SPC and the campaign.
- 5) Form partnerships with synods, presbyteries, congregations, and seminaries in the Northeast.
- 6) Enact initial Matthew 25 programming at SPC before going public with the campaign.

# Elements of a Successful Campaign



# Develop a Compelling Case for Support

Any future Case for Support will need to address the following frequently asked questions:

1. *What is Stony Point? What is its mission and what services does it offer?*
2. *Why Stony Point? Why is this the place that we are going to bring the PC(USA)?*
3. *Do other groups besides Presbyterians get to use SPC? Who is included in SPC's audience?*
4. *Why is PMA raising money for Stony Point?*
5. *What is SPC's role in making the Matthew 25 vision happen?*
6. *What proportion of funds will go to each case component?*
7. *What about people who are further away – is there a way for SPC to come to them?*



# Personalize the Case for Support

## PMA Donors

Connect SPC to Matthew 25 and World Mission

## SPC Donors

Emphasize the link between PC(USA)'s mission and SPC's work

## Donors in the Northeast

Stress that improved facilities would make SPC an even stronger resource for the region

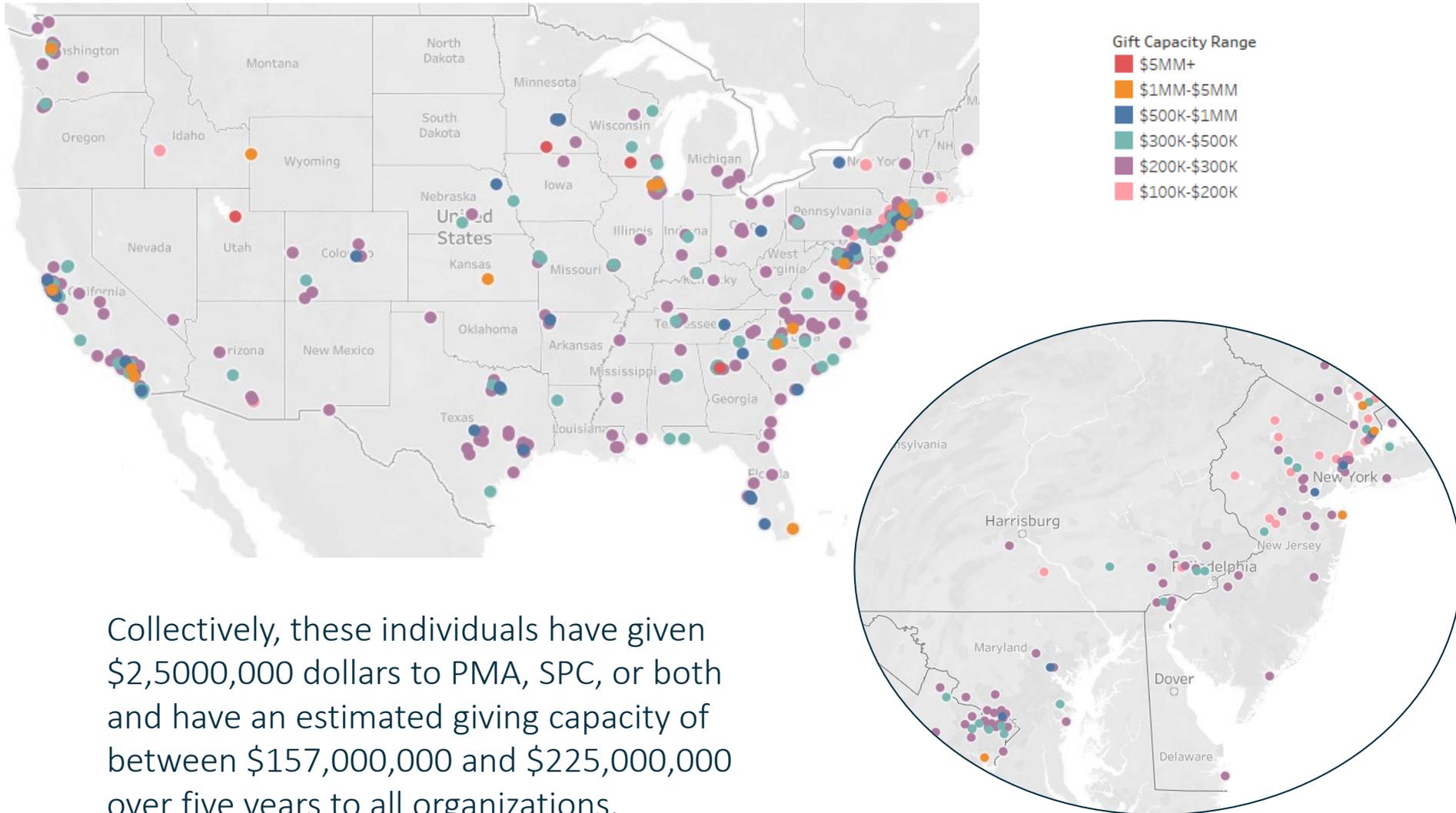
## Donors throughout the Country

Explain how the programming at SPC can be brought to them

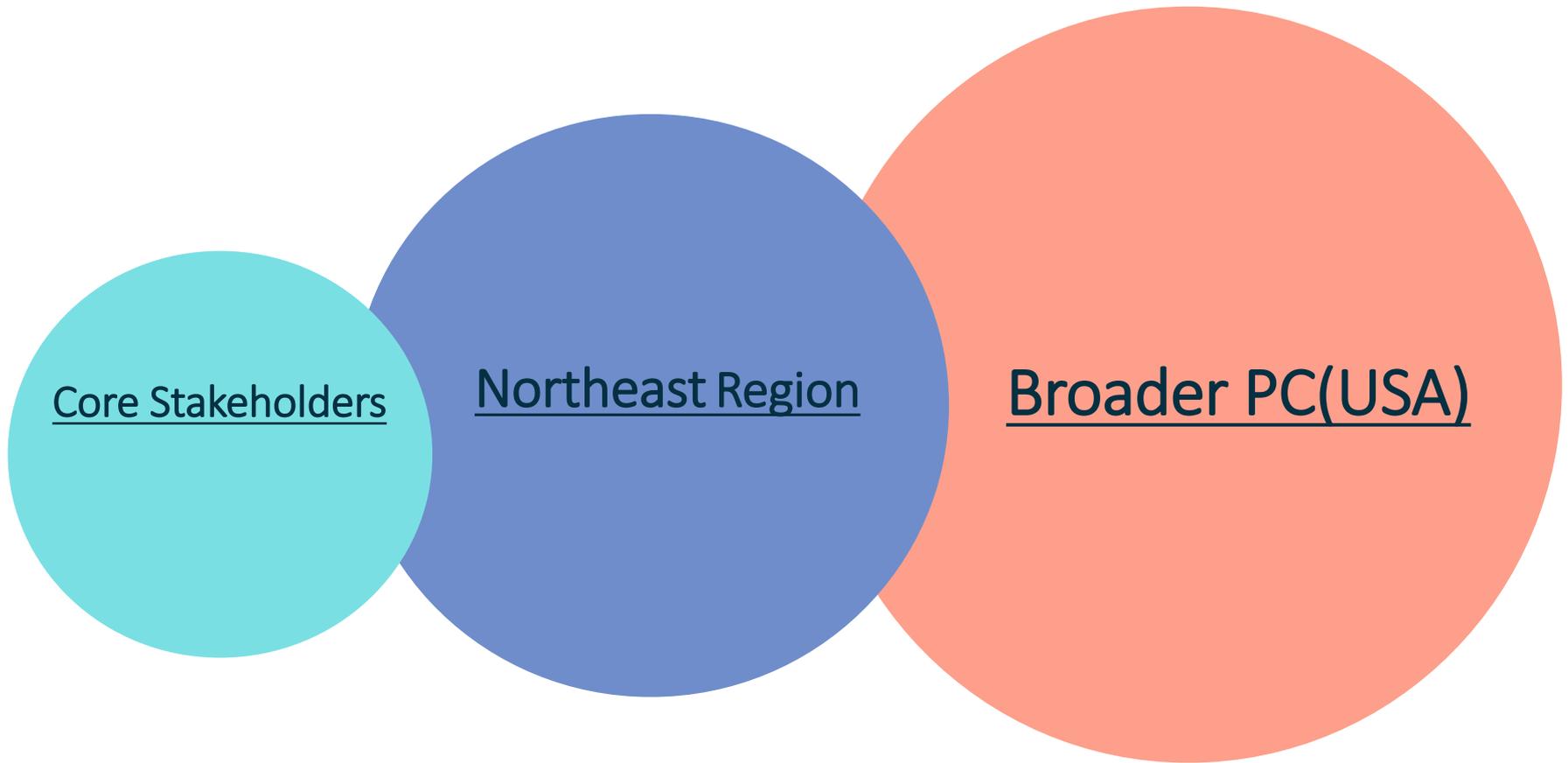
# Table of Gifts to Raise \$4,000,000

Number of Gifts	Gift Level	Totaling	Cumulative
<b>1</b>	\$750,000	\$750,000	<b>\$750,000</b>
<b>3</b>	\$250,000	\$750,000	<b>\$1,500,000</b>
<b>5</b>	\$100,000	\$500,000	<b>\$2,000,000</b>
<b>10</b>	\$50,000	\$500,000	<b>\$2,500,000</b>
<b>20</b>	\$25,000	\$500,000	<b>\$3,000,000</b>
<b>40</b>	\$10,000	\$400,000	<b>\$3,400,000</b>
<b>Many</b>	<b>\$10,000 and less</b>	<b>\$600,000</b>	<b>\$4,000,000+</b>

# 498 Potential Top Financial Prospects



# Prioritize Financial Prospects



# Cultivate and Empower Leadership

## Volunteer Leadership

PMA and SPC leaders should recruit eight (8) to ten (10) high-level volunteers to help design the campaign. This group should be diverse in terms of age, race, and faith and include a focus on the Northeast.

This group will meet three (3) times during a six (6) week period to:

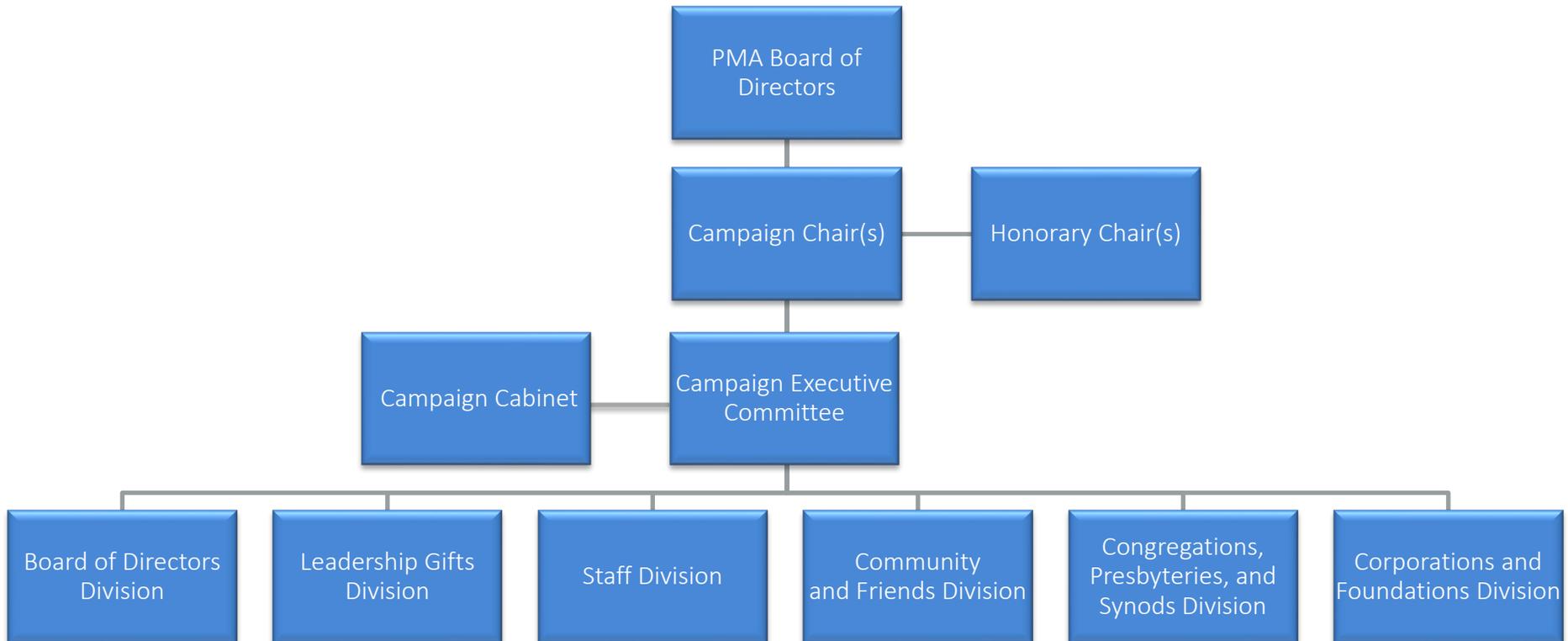


## Staff Leadership

The campaign will require a significant time commitment from Diane Moffett, Rosemary Mitchell, Ray Jones, and Rick Ufford-Chase as well as Mission, Engagement, and Support. All individuals will need sufficient support to run a successful campaign in addition to their day-to-day responsibilities.

It is essential that staff leaders present as one unit, not as separate representatives from PMA and SPC. The public will need to be assured that this campaign is a joint vision and that the relationship between PMA and SPC will be stable going forward.

# Campaign Organizational Chart



# Develop a 15-Month Active Campaign Plan

Detailed plan for  
all case  
components

A sequential  
approach  
prioritizing the  
best prospects

Specific financial  
and leadership  
benchmarks

Fully trained and  
empowered  
volunteer leaders

Targeted  
messaging for each  
constituency

Professional  
planning and  
direction

# Preliminary Campaign Timetable

	2020			2021				2022	
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
<b>Planning Phase</b>									
Develop and finalize Case for Support									
Recruit and train top leadership									
Develop communications plan and distribution channels									
Refine campaign plan									
Cultivate relationships in the Northeast region									
<b>Core Stakeholders and Northeast Region</b>									
SPC Leadership and Major Gifts									
PMA Board and SPC Advisory Board									
PMA and SPC Staff									
PMA and Northeast Leadership Gifts									
<b>Northeast Region and Greater PC(USA)</b>									
PMA and Northeast Major Gifts									
Foundations and Corporations									
Implement initial Matthew 25 programming at SPC									
<b>Public Announcement</b>									
Matthew 25 congregations and presbyteries									
Large congregations in liberal areas									
<b>Campaign Wrap-Up</b>									
Invite all remaining prospects									



# Thank You!

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