



FINAL REPORT TO DIOCESAN SYNOD

NOVEMBER 2004

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FINAL CAMPAIGN REPORT TO DIOCESAN SYNOD  
November 2004

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## BACKGROUND

The Survive & Thrive (S&T) Campaign was created by the Stewardship and Financial Development Committee at the request of the diocesan bishop to generate funds to support parish ministry and the strategic priorities of the synod. Feasibility studies undertaken in 1998 and early 1999 indicated a successful campaign was possible if donors could be shown that their investment would benefit parish ministry and not create added central infrastructure. The feasibility study also showed donors would need to know that their donations would be invested wisely, have a long life, and not be eroded within five years.

Key strategic imperatives in the diocese to be supported by campaign proceeds included:

- Become a “learning” organization focused on continuing education of clergy and laity – learning new skills in evangelism, stewardship, outreach, organizational development, preaching, liturgics, and volunteer management.
- Give parishes the tools they need to become more spiritually vibrant
- Encourage more creative ideas for new parish ministries that promote spiritual and congregational growth.
- Support parish efforts to become more outward looking and responsive to local community needs

Two fundamental principles informed the campaign - that the campaign was raising money to be spent *“in parishes and by parishes”* and that the money was to support new programming initiatives and would not be spent to add new diocesan staff and structure at the Diocesan Resource Centre. As an aside, at one point, the rumour mill in the diocese indicated many people mistakenly thought the new diocesan Director of Evangelism was being paid with Survive & Thrive funds in contravention of this promise to donors. This was never the case. However, in complete faithfulness to the spirit of the campaign, significant evangelism programming dollars were allocated by the Ad hoc Spending Review Committee for use by the Director of Evangelism in funding programming in support of parishes.

Additionally, the campaign case committee wished to remain faithful to the learning from the feasibility study and set up endowment funds so that the parishes of Niagara would benefit from the campaign long after the pledge period had been completed. To that end, two endowment funds were created – the *“Education and Training”* endowment and the *“Outreach in the Name of Christ”* endowment. Approximately 38% of every dollar raised (after expenses and other parish commitments) was transferred into these two endowment funds in support of the strategic imperatives mentioned above and 62% of net proceeds raised was allocated to ‘short term’ projects.

## EVALUATION OF PARISH S&T PROJECT SUCCESS

Also fundamental to the campaign was the decision that parishes must write a parish strategic action plan looking at their entire ministry in order to access funds from the campaign. Parish action plans would indicate how the new program requiring funding would fit into the overall ministry plan for the parish. It was felt that this requirement was necessary in order to be faithful stewards of donors' money and not commit funds for projects that were ill-conceived, strategically suspect, or for projects that might yield only short term benefits.

Campaign proceeds disbursement criteria for parishes was made clear up front. Parishes were told that their projects should be designed and later evaluated based on eight criteria or critical success factors for a healthy parish:

1. Consistent attendance growth at church services
2. Effective and expanding parish programs for children and youth
3. Increase in identifiable givers and the average gift per giver
4. Measurement of spiritual vitality by surveys
5. Programs that are long-term, actively outward looking, self-supporting and subject to regular review
6. Parish financial stability
7. Growth in empowered lay leadership
8. A widely-held positive reputation in surrounding community.

In essence, the ultimate success of the campaign can only be evaluated on a grant by grant basis against these critical success factors.

## CAMPAIGN TARGET

After review of the research from the feasibility study a target of \$8 million was set for Survive & Thrive by the case committee. The goal was to have money available for ministry projects with the following allocation:

### **3 Core Areas of the Case for Support**

#### Education and Training

Short term grants	\$2 million
Endowment fund	\$2 million

#### New Ministries for Growth

Short term funding of new ministries	\$2 million
Parish Development/Re-development	\$1 million

Outreach in the Name of Christ Endowment	\$1 million
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In total, the case called for \$3 million to be transferred into endowment funds and \$5 million to be spent during the five year pledge period.

As the campaign began, the case committee optimistically hoped that over \$9 million could be raised and all campaign expenses covered leaving a net of \$8 million for ministry projects. The case for support committee in consultation with Ketchum Canada (our outside consultant) determined this goal was achievable if the campaign had a five year pledge period. Much discussion took place on the length of the pledge period. Ultimately, the committee accepted the consultant's advice.

By the conclusion of local parish campaigns Survive & Thrive pledges and gifts totaled \$8.4 million. Under the circumstances, the campaign management committee was very pleased and celebrated this wonderful achievement. However, when parish piggy-back commitments, parish debt reduction, overage payments to over-achieving parishes and campaign expenses were covered a considerable portion of the \$8.4 million pledged had been re-allocated in areas other than the three core areas of the campaign case.

Net proceeds were distributed to projects in these three core areas on a pro-rated basis. Net proceeds to the two new endowment funds were also pro-rated to 37.5% of net dollars after payouts to the four areas mentioned in the previous paragraph.

#### ADAPTING THE CAMPAIGN TO EVOLVING CONDITIONS IN THE PARISHES AND WIDER DIOCESAN FAMILY

After approval to proceed was given overwhelming support at the November 1999 synod, the campaign began with major gift visits and was launched at several pilot parishes in January 2000. A formal agreement with a professional fundraising consultant – Ketchum Canada – was signed and parish campaigns were directed by the consultant. The diocese was divided into three regions, North, Central, and South, with a Ketchum consultant in each region and a Ketchum Campaign director overseeing these three regional consultants. A campaign administrator was also hired on a one year contract. The Director of Stewardship and Financial Development of the diocese co-ordinated and supported these efforts. Early in the campaign his position rapidly evolved into a trouble-shooting role, primarily focused on bringing reluctant parishes on board with the campaign and interpreting Anglican parish culture to the outside consultants on an on-going basis to maximize their effectiveness. Throughout the campaign, the Director of Stewardship's role included support of parishes through visitor training, major gift prospect review, negotiation of all the piggy-back agreements on the bishop's behalf, and preaching.

Very early in February 2000 it became apparent that the Synod was in serious financial difficulty and a series of regional meetings were held to inform the people of Niagara Diocese of the scope of what can legitimately be described as a financial crisis. At one point it was a very real possibility that the campaign would be postponed or abandoned due to concerns about the financial health of the diocese. At the same time, there were worries in the wider Canadian Anglican church that the National Church was on the verge of bankruptcy due to legal obligations brought about by the Residential Schools crisis. At the time, many donors were worried their Survive & Thrive donations might be attached by the courts to fund settlement payouts to victims of Residential Schools abuse.

The bishop, in consultation with key parish leaders, determined to proceed with the campaign. His decision was based on the thinking that nothing had changed – the campaign remained both strategically sound and vitally necessary. Any analysis of the success of the fundraising portion of the campaign must take into account the immeasurable loss of donations from potential donors deterred by these two crises.

Additionally, as the campaign evolved, a major concern came from the many parishes that were in the middle of significant parish capital or programming projects themselves. The campaign management committee, aware that there is no ideal time to run a diocesan-wide campaign that works for all parishes, asked the bishop for flexibility in accommodating parishes in the middle of large parish projects. A piggy-backing process was created. This enabled parishes that wished to be supportive of the wider diocesan family to resource their own project funding simultaneously. The campaign management committee, in an effort to be flexible and responsive to such parishes, negotiated individual piggy-back covenants between parishes and the bishop.

Further flexibility was necessary as several parishes told the campaign management committee they wished to use a portion of S&T fundraising proceeds to pay down historical debt to the synod. These parishes alleviated this historical burden in this way and over \$250,000 in debt to the Synod was erased with S&T funds.

Finally, some parishes asked the campaign management committee for consideration in instances where they exceeded their parish campaign goal. Each parish had as a target, the equivalent of their 1998 operating income spread over a five year pledge period. The campaign adapted to parishes that exceeded this goal by returning 50% of any *overachievement* to target back to the parish.

## QUINTILE ANALYSIS OF PARISH PERFORMANCE VS. PARISH TARGET

The following chart looks at parish performance versus the "fair share" target set for each parish. Remember that the parish target was the equivalent of 1998 operating income, but spread over a five year period. Essentially, the campaign target for each parish was equivalent to 20% of parish income a year for five years.

PERFORMANCE	# OF PARISHES
_100% of target	25
80-99% of target	16
70-79% of target	5
50-69% of target	18
<50% of target	<u>45</u>
TOTAL	109

These figures would seem to indicate, that for at least 60% of the parishes, the parish target was much too aggressive. In looking at the 41 parishes that achieved or were reasonably close to target there are no discernable patterns. Parishes that met target were from all six regions of the diocese, large parishes and small rural parishes. The only constant in the successful parishes was strong clergy and lay leadership behind the project. Having said that, there were many parishes where very strong leadership of the campaign did not result in achievement of the local target. In hindsight, the diocesan financial crisis most certainly rendered many parishes' aggressive targets unachievable.

### CAMPAIGN OVERSIGHT

The Survive & Thrive campaign management committee oversaw the execution of the campaign and control of campaign expenses. When the diocesan financial crisis of Winter 2000 was discovered a decision was made to create an ad hoc Spending Review Committee for the campaign. The mandate of this committee was to oversee the granting of campaign funds to ensure that all grants were made in harmony with the case for support. The campaign leadership and synod council felt this new committee was necessary to reassure donors their gifts would be managed wisely. The thanks of everyone in Niagara diocese must go out to all members of both the Campaign Management Committee and the ad hoc Spending Review Committee for their faithful discharge of their important ministry to the diocesan family.

The added level of grant review structure was at times unwieldy. The ad hoc committee mandate placed it in a position of needing to ratify/uphold Grants Committee decisions or send those decisions back for further review. Donors can rest assured, however, that every grant made went through three levels of

approval. (The third level was the assent of the local archdeacon prior to the grant request being presented to the Grants Committee.)



SECTION 1  
Campaign Participation, Proceeds  
and Estimated Final Revenue

COMMENTARY

PARTICIPATION LEVELS - Parishes

In the early 1990s the diocese ran the Focus II Campaign. Only 50% of parishes in the diocese participated in Focus II. This low level was of great concern to the Survive & Thrive campaign management committee. At the time Survive & Thrive was launched, there were 114 parishes in Niagara. Bishop Ralph told the November 1999 Diocesan Synod that he was asking the diocesan family for 100% parish participation. By the end of the campaign, 111 parishes or 97.3% of parishes in the diocese took part in the campaign. The campaign management committee was grateful beyond words for this extraordinary level of support from parish leaders for the campaign. Three parishes were given special dispensation from the bishop due to extenuating local circumstances. Additionally, one parish undertook only a letter-writing campaign.

PARTICIPATION LEVELS - Donors

There were approximately 16,824 donors on parish lists during the execution of the campaign in 2000. A total of 3,991 gifts or pledges were received. This represented a 23.7% participation rate in the campaign.

Thirty four donors gave major gifts to the campaign. A major gift was defined as \$25,000 or more. The average gift from major donors was \$42,150. The largest gift to the campaign was a donation of 5000 TD Bank shares which were valued at \$159,000 and later sold by the campaign for \$179,000. One \$240,000 pledge was made but never received as the donor left the Anglican Church.

The average gift to the campaign from all donors was \$1,553 over five years. There were significant differences by region in the diocese as the following chart reveals:

REGION	AVERAGE GIFT	PARTICIPATION LEVEL (% of ELIGIBLE DONORS)
Undermount	\$1,637	29%
Trafalgar	\$1,956	23%
Lincoln	\$1,201	21%
Brock	\$1,306	20%
Mohawk	\$1,400	23%
Greater Wellington	\$1,436	34%
DIOCESAN TOTALS	\$1,553	24%

The campaign management committee noted that participation levels (% of identifiable givers who make pledges or gifts) were higher in parishes that had piggy-back campaigns where the money could be *seen* to filter directly back to the parish.

For example:

PARISH	PARTICIPATION LEVEL	INDEX TO AVG
St. John's, Ancaster	39%	144
St. Matthew's, Burlington	47%	196
Guelph, St. David's & St. Patrick's	42%	175
Church of the Resurrection, Hamilton	35%	146

### CAMPAIGN PROCEEDS

At the conclusion of the campaign, total dollars raised in both gifts and pledges was \$8,400,000. The professional consultants advised the diocese to anticipate slippage in pledge fulfillment of approximately 4%. Based on this degree of slippage, the final proceeds from the campaign were estimated at the conclusion of the fundraising phase to be \$8,064,000. Attempts to minimize the amount of slippage were made by investing in the software and human resources needed to generate regular reminder and thank you letters. Additionally, the Stewardship and Financial Development committee produced annual Survive & Thrive newsletters to donors telling the stories of how grant monies were being invested in ministry and helping parishes to resource important new ministries. The Niagara Anglican and website were also employed to tell these success stories.

Despite these actions, slippage in fulfillment has been greater than our consultants anticipated. The Survive & Thrive ad hoc Spending Review Committee exercised diligence by putting a moratorium on new grants in mid-2003 pending a final assessment of slippage and money available.

At this point final proceeds as the pledge period winds down at the end of 2004 are estimated to be \$7,893,000. This represents slippage of 6 %. Trends in 2004 indicate the slippage could be greater. In retrospect, it appears the five year pledge period was too long. We believe the slippage would have been less had it been a 3 year pledge period.

### TRANSFERS TO PARISHES

The campaign negotiated piggyback agreements with 32 parishes in order to successfully carry out the campaign. We estimate that final piggyback payments to parishes will total \$1,377,747. This represents 17% of projected final

campaign proceeds and, of course, a significant financial impact on ability to address many of the priorities identified in the case for support.

#### PARISH DEBT REDUCTION

Many parishes wanted the opportunity to use the campaign to pay down historical debt to the diocesan family. We project that \$250,389 will be collected to reduce the debt position of parishes to the synod. Although this was money that did not contribute to the campaign it was felt by the campaign management committee that this debt relief would situate parishes in a better position to survive and/or thrive and was, thus, consistent with the overall philosophy of the campaign.

#### SUMMARY OF PROJECTED NET PROCEEDS

Estimated Campaign Final Revenue		\$7,892,876
Less:		
Campaign Expenses	\$1,031,366	
Piggyback Payouts	\$1,377,747	
Parish Debt Reduction	\$ 250,389	
Goal Overachievement Payouts	\$ 76,971	
ACM Foundation Transfer	<u>\$1,786,322</u>	
TOTAL COMMITMENTS	\$4,522,795	
Net Proceeds Available for Short Term Grants		\$3,370,081

Looked at another way, the following projection is a more accurate snapshot of "real" funds raised for ministry in Niagara:

Available for Short Term Grants	\$3,370,081
ACM Foundation Transfer	\$1,786,322
Piggyback Payouts	\$1,377,747
Goal Overachievement Payouts returned to parishes	<u>\$ 76,971</u>
TOTAL AVAILABLE FOR MINISTRY	\$6,611,121
Add Debt Reduction	\$ 250,389
"Real" Funds for Ministry	\$6,861,510

## SECTION 2

### Transfers to Anglican Church Ministries Foundation Endowment Funds

As indicated earlier in this report, the campaign case called for a transfer of 37.5% of net funds raised to the Anglican Church Ministries (ACM) Foundation endowment funds. These funds are to be held in perpetuity with interest income (after fund management expense) available to fund ministry projects.

As at September 30<sup>th</sup> a total of \$1,507,603 has been generated for the ACM Foundation to fund future ministry initiatives. These monies have been allocated on a 2:1 ratio to the "*Education and Training*" fund and the "*Outreach in the Name of Christ*" fund.

Based on projections of final fundraising revenue received, we estimate the following final amounts from the campaign transferred to the diocesan foundation:

Estimated total transferred to the ACM Foundation	\$1,786,322
Education and Training Fund	\$1,191,476
Outreach in the Name of Christ Fund	\$ 594,896

The Synod will continue to solicit planned gifts to the ACM Foundation and will continue to capitalize these funds as dedicated gifts are received.

The ACM Foundation anticipates distributing income from these endowments as market performance allows without encroaching on capital.

The goal at the start of the campaign was to transfer \$2 million in the Education and Training fund and to create a \$1 million endowment for Outreach. Unfortunately, these aggressive targets were not achieved as the net funds to the synod did not reach \$8 million.

#### GOVERNANCE

The Survive & Thrive ad hoc Spending Review Committee was responsible for oversight of the allocation of short term funds during the five year pledge period. Their mandate did *not* cover these two endowment funds. The Financial Advisory Committee in conjunction with the Spending Review Committee will be making a recommendation to Synod Council in early 2005 concerning a governance mechanism to oversee the granting of funds from these endowments. The ACM Foundation board of directors will continue to have oversight of the investment management of these funds.

### SECTION 3 Grants by Classification Type

The campaign granted monies to a total of 49 parishes that applied for funding under the Survive & Thrive program. In addition, several training events and conferences were funded through Survive & Thrive proceeds.

The next section of this document provides details of every grant made, the type of grant, and the anticipated grants still outstanding. Since that data is very detailed the following chart is presented here as an overview of the key categories of grants from campaign proceeds:

#### Education and Training

Evangelism Programming (incl. video)	\$112K
Demographic Study of diocese	\$ 48K
Conferences and Training Events	\$ 49K
Canterbury Hills Re-development	\$153K
Stewardship and Planned Giving training	\$ 32K
Screening, Grid Training, Fresh Start	\$ 53K
Learning labs, T Net, parish pilot projects, etc.	\$ 60K
Advertising & Promotion	
Signage (20)	\$104K
Marketing & Promotional materials	\$ 17K
Children & Youth Ministry Programming	\$ 51K
Alternative Worship Programming	\$ 30K
Deacon's School	\$ 10K

#### New Ministries for Growth

New Curacies (7)	\$282K
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New Youth Ministries (salaries) (13)	\$354K
Additional Associate Clergy (4)	\$112K
Area Team Ministries (3)	\$122K
Transitional Ministries (Clergy in Transition)	\$787K
Chaplaincy Grant	\$ 10K
New Niagara consultation	\$41K
Land Development (Palermo)	\$126K

SECTION 4  
Summary of Grants by Parish and Region

The following chart attempts to show how parish grant money was distributed by region:

REGION	# of PARISH GRANTS	\$ AMT. OF GRANTS	AVERAGE GRANT
Trafalgar	19	\$306,531	\$16,133
Undermount	8	\$147,500	\$18,438
Greater Wellington	9	\$108,781	\$12,086
Mohawk	15	\$278,977	\$18,598
Lincoln	13	\$202,699	\$15,592
Brock	10	\$191,055	\$19,105

#### Commentary

The up front goal of the campaign was to attempt to ensure grants were distributed proportionately amongst all regions of the diocese. Though this in-going goal was laudable, the process was also driven by the number and nature of grant proposals received by the Grants Committee from each region.

So, in essence, this chart reflects the nature and origin of applications received. This information is presented with a cautionary note. What it does *not* show is the investment in programming that benefited parishes in all regions. Program dollars invested in ministries such as those below benefited every region in the diocese.

- Diocesan demographic survey
- Evangelism programming
- Stewardship conferences
- Parish planned giving program and consultant training
- New Niagara consultation
- Preaching symposiums
- Fresh Start
- Screening
- Critical incidence training
- A portable diocesan Labyrinth
- Area team ministry salaries (Hamilton Mountain, Haldimand, Niagara Falls)

- Clergy in Transition
- Canterbury Hills

In Appendix 2 of this report you will find spreadsheets showing every grant made to parishes and for programming for parishes, the nature of the grants, along with actual amounts paid out.



## SECTION 5 Parish Grant Evaluations

Essentially, there are two distinct components that must be considered when evaluating the success of the Survive & Thrive campaign. The first is to analyze the success of fundraising efforts. The second is to determine the impact grants made on parish life. In this section we look at that impact.

All Survive & Thrive grants to parishes were made conditional upon completion of annual self-evaluations of the impact of the grant on the parish against agreed upon criteria and desired outcomes.

With two minor exceptions, parishes were very faithful in performing and submitting these self-evaluations. We learned that there are always going to be logistical 'bumps in the road' in compiling self-evaluations. Where parishes were in an interim ministry situation at some time during the life of the grant or wardens changed, it made follow up on behalf of the Grants committee more difficult.

The Grant's committee staff support found that the quality of the self evaluations was excellent. Parishes put a lot of time and effort into doing thorough annual self-evaluation and this is appreciated.

It is certainly not the place of this final report to present all of these evaluations. A sample of the self-evaluations of two parishes (Church of the Transfiguration, St. Catharines and St. Mark's, Orangeville) are included in the appendices of this report to give the reader a sense of the nature of the evaluations completed by parishes. All parish evaluations are on file at the Diocesan Resource Centre.

A major impediment when preparing this report is that analyzing the long term success of projects funded by parish grants is highly subjective. With that in mind, here are a few subjective observations:

### *Curacy Grants*

Over the past two decades, many parishes that historically had curacies are now not able to afford the cost of this ministry. This remains a significant problem as curacies play an important role in the training and development of a specialized ordained workforce for the parishes of Niagara. The problem will become even more acute as the Canadian Anglican church anticipates an unprecedented wave of retirements within the next five years. One of the key goals of the campaign case was to address this issue and provide more gateways to ordained ministry

through the establishment of new curacies. Grants were made on a three year sliding scale that encouraged parishes to supplement the funding and move towards becoming fully funded locally.

Survive & Thrive funded 7 new curacies in the following faith communities:

St. John's, Ancaster/St. Andrew's, Grimsby  
St. Matthew's, Burlington  
St. George's, St. Catharines/Haldimand Curacy  
Grace Church, Milton  
St. Mark's, Orangeville  
Holy Trinity, Fonthill

As mentioned, historically in Niagara, grants for curacies have always been given in the hopes that parishes will come to appreciate the merits of the curacy and fund curacies themselves. If we use this as sole criteria for judging the success of the curacy grants we can say that, as of this writing, five positions are still in place. However, these are not in all cases being fully funded by the parishes involved.

The campaign New Ministries for Growth fund was able to provide parishes a staffing opportunity. That was its responsibility. What parishes did with that opportunity was controlled at the local parish level. We are pleased that roughly 2/3 of funded curacies are currently believed to be sustainable.

Looking at the larger picture, it is important to note that 7 new clergy were empowered for ministry by the campaign. The church will reap these dividends for at least a generation.

Additionally, 12 parishes were able to fund temporary Youth Ministry positions due to funding grants.

## SECTION 6

Report of the Ad hoc Survive & Thrive  
Spending Review Committee

Peter Swire – Committee Chair

In this, the final report of the Ad hoc Spending Review Committee, we thought that we would share with Synod some of our learned experiences over the life of the committee.

In previous years, we had noted in our report to Synod that this ad hoc committee was established to act as an independent watchdog over the collection, the monitoring and the disbursement of funds in a manner consistent with the case for support. While our committee had a specific Synod originated mandate, it was left with the task of developing the rules and procedures necessary to ensure that the highest level of confidence in our collective work could be visibly demonstrated.

Throughout the five year life span of the committee we received pledges in excess of \$ 8.4 Million. In order to have good controls over the receipt and disbursement of funds, separate banking arrangements were established. At every committee meeting, we undertook a review of the rate in which funds were received and compared that to our multi-year spending plan. It was on one such review that we determined that in order to safeguard our existing commitments we placed a moratorium on new grants applications.

Throughout the disbursement side of the campaign, we remained vigilant in keeping our costs down. In fact, our total campaign costs held very close to the original expenditure estimates. It was only through the receipt of \$ 8.4 Million in gross dollars as opposed to net dollars did the actual percentage rise above our plan.

One of the essential elements of the case for support was the need to place funds into endowments to ensure that a continual stream of income would be available to future generations. At every meeting of the committee, we received reports indicating that the three-eighths share of all net proceeds were transferred to the Foundation.

During our tenure, we had a number of decisions to make which were not addressed during the crafting of the case of support. These issues included:

- ❑ How can we ensure equality of access to grant monies?
- ❑ How do we instill an application regime for Synod office initiated projects that requires justification for the monetary request in a format similar to that used by parishes?
- ❑ How do we handle the need for capital funding for minor equipment when the case for support was clear that capital items were not to be included?
- ❑ Once the projects were substantially complete, what type of reporting does our committee need and what to the donors and Synod need to see?
- ❑ How do we handle single small dollar value requests which are fully consistent with the case for support at times when the committee did not meet?

Over a five year campaign period the needs of the church will change. We need to consider how we build in flexibility and still satisfy our fiduciary responsibility to donors.

As chair of the ad hoc Spending Review committee I want to ensure donors that your committee was extremely diligent in attempting to ensure that all grants made were in harmony with the Case for Support. On one occasion the committee even sought outside legal advice in its desire to exercise this responsibility.

Our committee drew its strength from lay volunteers who had a myriad of parish and Synod experience. By design, these people represented many of the key ministry areas of the Church. We were ably supported by both members of the Synod office staff as well as others. Collectively, we were passionate in executing our mandate in a manner consistent with our Bishop's vision. In all of our decisions, we combined the empowering benefit of shared information in an environment where all could share their thoughts and experiences. While technically, we approved disbursements by a recorded vote from a practical sense these decisions were derived in a consensus model.

In this upcoming year, the committee may meet once or perhaps twice to address any final housekeeping matters relating to the campaign.

*Ad Hoc Spending Review Committee Members:*

Brian Grose, St. Cuthbert's, Oakville, Bishop's appt. representing Synod  
 Ted Wiffen, St. George's, Guelph, Bishop's appt. representing Synod  
 John Steven's, Incarnation, Oakville representing Mission Strategy  
 Peter Swire (chair) St. Paul's, Glanford, representing Grants Committee  
 The Reverend Ian Chadwick, St. Alban's, Beamsville, Representing Stewardship  
 Gord Archbell, St. Christopher's, Burlington, rep. F. A. C. (Financial Advisory)  
 Bob McKinnell, Diocesan Resource Centre, Diocesan Treasurer  
 Rev. Dave Ponting, Karen Nowicki, Staff Support

## SECTION 7

## Final Campaign Expenses

This section looks at the expenses incurred by the campaign management committee to raise the funds for the campaign. Here are summary details of money expended over the past five years to raise the funds:

Consultant Fees	\$591,803
Salary and Benefits	\$233,654
Software and Licensing Fees	\$ 41,372
Promotional Materials	<u>\$164,537</u>
TOTAL CAMPAIGN EXPENSES	\$1,031,366

## COMMENTARY

*Consultant Fees*

The campaign management committee, acting on behalf of the Synod and Bishop, signed a contract with Ketchum Canada Inc. to act as consultants for the campaign. Ethics norms in the fundraising industry clearly state that contracts must never be for a percentage of funds raised, but instead flat negotiated fees for consulting services rendered. The fees represented here are for consulting from June 1999 through December 2000. During that time frame we had five Ketchum consultants on site and access to many other Ketchum resources on an 'as needed' basis.

*Salary and Benefits*

During the fundraising phase, the campaign management committee hired a campaign administrative assistant and this salary was carried for one year. The Director of Stewardship and Financial Development salary and benefits were heavily pro-rated against the campaign for six months in 1999 and the year 2000. Also the stewardship administrative assistant has had a significant portion of her salary pro-rated against the campaign for the entire five year pledge period as she processes payments against pledges, sends out regular computer generated reminder letters, thank you letters and generates needed campaign reports.

*Software and Licensing Fees*

In order to process and track campaign donations, generate reports on parish performance versus target, generate payment reminder and thank you letters a new fundraising software system was necessary. The campaign management committee selected a software product called GiftTRAQ. There was a substantial

outlay in 1999 to buy the software and we continue to pay annual royalty fees to use the software.

#### *Promotional Materials*

In effect Survive & Thrive was 111 local parish campaigns. Promotional materials were needed for every household on the lists of each of these parishes. Materials expense included campaign brochures, the campaign theological reflection brochure, visitor's kits, pledge cards, letterhead, envelopes, logo development, graphic design charges, copywriting for the case for support and production, duplication, and distribution of the campaign video. There were significant expenses for the Ketchum people to set up their regional offices during the campaign (phone, computers, travel). Another significant expense was the cost of producing the annual Survive & Thrive newsletters to donors to show them how their money was being spent and motivate donors to fulfill their total pledges. Finally, postage costs for the campaign were over \$20,000 due to quarterly mailing of reminder letters to those who pledged, thank you letters from the bishop for gifts and other communication with donors.

#### *Expenses as a Percent of Fundraising Revenue*

Industry standards in fundraising are that final expenses tend to run in the 8%-12% of proceeds range. In all sincerity the Stewardship and Financial Development committee told the 1999 Diocesan Synod when it approved the campaign that the campaign management committee was committed to keep expenses well within this range. This commitment was based on an objective of raising a net of \$8 million AFTER expenses and any parish distributions.

Due to circumstances mentioned earlier this did not happen. As the campaign pledge period winds down it appears that final campaign expenses as a percent of revenue will be roughly 12.8 %. Should slippage be more than estimated this percent will obviously increase.

## SECTION 8 Campaign Learning and Recommendations

There are two areas where learning and feedback from those involved intimately in executing the diocesan-wide campaign may prove helpful. The first is in raising the funds and the second is in the administration of the grants process.

### PART 1 - FUNDRAISING LEARNING

#### *(i) The Hiring of Outside Consultants*

One key issue the Stewardship and Financial Development Committee struggled with in conducting its own post-mortem on the campaign was to ascertain the value for money received for campaign consultancy fees.

The committee asked this specific question of parish leaders invited to a post-mortem dialogue held at St. Andrew's, Grimsby at the conclusion of the fundraising portion of the campaign. To the committee's surprise, most attending that meeting indicated support for the consultant and felt the money could not have been raised without the individual attention afforded by the consultants to each parish. Leaders from one region of the diocese (central) believed the consultant to be especially valuable while the other two regions experienced mixed results from their assigned regional Ketchum consultant.

Arguably, our experience continues to reinforce that consultants are necessary when campaigns are based on the secular fundraising model used for Survive & Thrive.

Having said that, the author of this report believes that the methodology for diocesan capital campaigns must change to a more faith-based model and recommends that the Stewardship and Financial Development committee investigate other models for capital fundraising that will deliver results at a much more palatable cost. Some experience with alternative models is available within the diocese.

#### *(ii) Pledge Fulfillment*

In any campaign of this magnitude, raising the money, though time consuming, is only half the battle. In order to try and maximize the fulfillment of pledges and minimize slippage the Stewardship and Financial Development committee produced annual Survive & Thrive newsletters telling success stories and

informing donors about ways their investment money was being deployed through ministry grants. The stewardship office solicited these stories and published them, both in newsletters and on the website. Our thanks goes out to the parishes who submitted their stories. We plan a final newsletter for release December 1<sup>st</sup>, 2004 with the theme "*What Survive & Thrive grants have meant to my parish.*" Additionally, parishes have been provided with sample bulletin announcements inviting donors to contact the synod office in Fall 2004 for accurate information on outstanding pledge balances.

As mentioned earlier in this report, Ketchum advised us to expect slippage of approximately 4%. For the first 3 ½ years of the campaign this estimate appeared accurate. A slowdown in pledge fulfillment in 2004 has us concerned that slippage is growing in the final year of the campaign and will unfortunately exceed 4%. In hindsight, the 5 year pledge period was probably too long to sustain interest (especially with the added impact of the Residential Schools crisis distracting donors and the blessing of same sex unions issue diverting funds). A 3 year pledge period, while reducing the amount we might have raised, would have also reduced the slippage liability.

Because of this unknown factor, the Survive & Thrive ad hoc Spending Review Committee put a moratorium on the granting of any new funds until final slippage numbers are known. Thus, we have been able to avoid spending more than we receive. We continue to monitor this situation very closely. Should the slippage be *significantly* different from current estimates we will release a revised final financial summary report.

The author of this report recommends that any future capital campaigns be limited to a maximum three year pledge period.

### *(iii) Timing Issues*

The professional consultants felt that individual parish campaigns could be completed from conception to fruition in about three months. The reality was that most parish campaigns took from four to six months to complete. This created a backlog as the contract with Ketchum was for four people on site in the diocese from January – June 2000. A decision was made by the campaign management committee to extend the contract to have one Ketchum consultant on the ground in parishes for the September to November 2000 time frame to complete local campaigns. The Director of Stewardship also acted as a campaign consultant to parishes in the Fall of 2000 with the Ketchum person. Between the two, the remaining 30 parishes who did not complete their campaigns prior to the end of June executed their local campaigns in Fall 2000. This additional contract added to the cost of the campaign as it was unbudgeted.



Additionally, we underestimated the length of time the local parish campaigns would be disruptive of parish life. Campaigns were labour intensive, distracting and often re-allocated key passionate volunteers from important local ministry projects. A methodology to accelerate the completion of local parish campaigns is badly needed. Other fundraising models beyond this *"face to face ask, every member visitation"* should be seriously considered.

*(iv) Setting Goals and Targets*

There was a desire by the Case for Support committee to be seen to set goals equitable for all parishes. The target of \$8 million (net) was based on a feeling that every parish had the ability to raise the equivalent of one year's operating income over a five year period. In other words, the target was a 20% increase in giving every year for five years. This method of goal setting was seen to be equitable for all parishes in Niagara. Local situations were only taken into account for piggy-back parishes. Therefore, for a majority of parishes, the local fundraising environment was not considered. Because of this, only 23% of the parishes in Niagara met target. This underachievement left many parishes feeling like the campaign had been a local failure. This is very unfortunate as significant amounts of money were raised to be deployed outside the parish. The individual negotiation of piggyback targets was also very disruptive and time consuming; in several cases causing significant delays in starting local campaigns. Future campaigns should seriously consider a standard policy of a 50/50 split with the overall diocesan goal adjusted downward accordingly to reflect this reality.

*(v) Continuity*

The campaign was blessed by the talents on the campaign management committee and at the parish level of many volunteers who had experience on other non-profit secular fundraising campaigns, parish capital campaigns, the A.I.M. (Anglicans in Mission) campaign and on Focus II. One key factor in these types of campaigns is that, for many, it is a totally new experience. The importance of continuity can not be over-emphasized should the synod ever determine to run a major capital campaign in the future. The learning curve in implementing a campaign of this magnitude is unimaginable unless one lives it. It is hoped that, for a current generation of parish leaders, the campaign will leave a legacy of skills and expertise in special project fundraising.

*(vi) Celebration and Thanksgiving*

At the conclusion of the campaign the committee organized a celebration service of thanksgiving at the Cathedral to give thanks to God for the success of the

fundraising portion of the campaign. The Cathedral was packed and many volunteers were recognized for their important contribution. The service reminded many of the theological imperative to celebrate and give thanks.

Parishes were also recognized on the website for achieving goal and a volunteer honour roll was also created. Discussion of donor recognition took place at the campaign management committee table. It was decided that, since individual parishes have unique cultural responses to donor recognition, we would not undertake specific donor recognition at the diocesan level.

## PART 2 – GRANT ADMINISTRATION

### *(vii) Grant Application Process*

The Case for Support committee was aware that donors want their donations to be invested wisely on ministry projects that are sustainable over time. In order to address this concern, the committee recommended to the November 1999 Synod that all parishes must write complete Action Plans that looked at their total ministry plan in order to access funds. The goal was also a desire to create a teachable moment to encourage parishes to become more strategic in their planning for ministry. This was a change from past Grants committee applications that had to be a rationale for a specific project only.

For some parishes, it is hoped that this exercise will leave a legacy of a more strategic approach to ministry. For many parishes that were more strategic in their outlook, the application process was time consuming and cumbersome.

There has been some discussion on dispersal of funds granted. The concern is that some parishes lack a sense of urgency in completing parish self-evaluations of grants and require extraordinary follow up efforts. One thought is that grant payments be made conditional on submission of interim evaluations. The other that 10% of a grant be held back on a lump sum grant until an evaluation is completed. We submit these two suggestions to the Grants Committee for consideration.

### *(viii) Grants for Capital Expenses*

The Case for Support clearly stated that grant monies were for programming expenses only and not capital goods or bricks and mortar. Several grant applications from parishes included requests for funding for capital expenditures necessary to implement programming. The ad hoc committee found itself in a difficult position, turning down grant applications for computer hardware and

approving money for LED projectors for stewardship, a parish resource centre, music outreach program to area youth (St. Hilda's) and Fresh Start. In today's world, the successful implementation of programming often includes the need for capital equipment. This needs to be clearly set out in future campaign planning.

*(ix) Duplication of Effort*

There was certainly duplication of effort between the (Parish) Grants Committee and the Ad hoc Spending Review committee. The establishment of the ad hoc committee was in reaction to the diocesan financial crisis revealed during the early fundraising phase of the campaign. Still, the ad hoc committee was the only vehicle for review of non-parish grants and performed a very valuable role. This role could be given to the Grants Committee in the future. At times the duplication of effort seemed a waste of valuable volunteer time. From a sheer perspective of effective volunteer management, this duplication should be avoided in the future.

*(x) Creativity*

The Case for Support Committee hoped that Survive & Thrive would encourage creative and innovative new ideas for doing ministry in a rapidly changing world. Parishes were encouraged to brainstorm ministry ideas "outside the box" and experiment with new models for doing ministry in regional clusters when they made their grant applications. There were very few grants of this nature made during the past five years. This reality might provoke discussion in parishes or in the Grants Committee about possibilities for greater innovation.

*(xi) Testimonials*

In order to read the stories of how the grant money from Survive & Thrive was used to support new ministry initiatives in parishes the reader is invited to go to the diocesan website and click on <http://www.niagara.anglican.ca/survive.cfm>. There you can view the stories available in Adobe Acrobat through the many Survive & Thrive newsletters posted on the site.

## APPENDICES

## APPENDIX 1

*THE SURVIVE & THRIVE  
CASE FOR SUPPORT*



**Anglican Diocese of Niagara  
Case for Support**

**SURVIVE & THRIVE CAMPAIGN  
FROM VISION TO REALITY**

**A VISION FOR THE FUTURE**

*“In every generation, the bishops, clergy and people have had to adapt their ministry to the times. When we have done our ministry well in the past, we did not lose the Gospel story but allowed it to flourish in our lives. To continue to equip the saints for ministry is my goal and is my charge to you today.” Bishop Ralph Spence, 1998 Synod*

Our diocesan family faces challenges that we cannot afford to ignore.

Not only to survive but also to thrive in the next century, we need resources and knowledge so that our parishes can deliver vital ministry. We need to be equipped – equipped to answer the serious and varied challenges confronting our communities.

We see our parishes transformed into vibrant, outward-looking communities that delight in gifted leadership, effective organization, and deep spirituality. This is our vision.

If we remain true to our vision, we can inspire church attendance and respond to the complexities represented by multiculturalism, secularism and consumerism. We must learn how better to reach out to the un-churched and those unacquainted with the Gospel. By investing in human capital and by concentrating our focus at the parish level, we will be assembling the tools to do the work of God.

We can neither ignore nor discount the urgency that surrounds these issues. No one parish can do it alone. But we can succeed as a diocesan family by gathering our strength from the sum of our parts, leveraging our collective strength to transform our vision into reality.

Only with the proper resources in place can we respond to the incredible potential of what we can do together. The *Survive and Thrive Campaign* seeks to raise a minimum of \$8,000,000.

*“We, being many, are one body, for we all share in the one bread.”*

## **OUR STRATEGY NEW SKILLS FOR THE NEW MILLENIUM**

*“To dream, to vision and to pursue new ministries demands us to be practical and responsible. We need resources for the implementation of a renewed Church.”*

Bishop Ralph Spence

To survive and thrive as a diocesan family, we must become a learning organization. Investing in our future will give our diocesan family the knowledge, skills, and experience to equip us to grow in heart, mind and spirit. In the past, organizations counted bricks and mortar as assets, but today assets are increasingly defined as knowledge-driven people who are empowered to be innovative, flexible and responsive. A consistent investment in our people – clergy and laity – will yield an hundredfold.

We are not alone in recognizing that continuing education and training are essential to any successful enterprise. Learning continues throughout all our working lives. As a diocesan family, we too need to set a high priority on education, learning new skills in evangelism, stewardship, outreach, organizational development and human resource management.

Becoming a learning organization requires resources – from a fund that is endowed and managed as part of a disciplined planning and development process. It must be responsive to the needs of our parishes. Accountability will be at the forefront of this commitment, incorporating reporting systems for tracking progress and results. Contributions will have a long life, will be well spent and yield optimum benefits.

## CRITICAL SUCCESS FACTORS MEASURING OUR PROGRESS

*“We have to adapt to changing realities quickly if we are to survive and flourish. But that transformation depends not only on vision but also on developing and implementing a strategy that will do the job. To be successful, we must be strategic in our thinking.”*

Parish Rector

Parish ministry will be the sole focus of funds raised. Ensuring that our long-range plans for parish development are achieved demands that we are effective in evaluating our progress. We will track progress by focusing on eight critical success factors (proven signs of a healthy parish) and will insist that all initiatives be regularly reviewed.

1. Consistent attendance growth at church services.
2. Effective and expanding parish programs for children and youth.
3. Increase in identifiable givers and the average gift per giver.
4. Measurement of spiritual vitality by surveys.
5. Programs that are long-term, actively outward looking, self-supporting and subject to regular review.
6. Parish financial stability.
7. Growth in empowered lay leadership.
8. A widely-held, positive reputation in the surrounding community.

## FROM VISION TO REALITY TACTICS FOR SURVIVING AND THRIVING

Our objective is to invest in human capital by providing the learning, expertise and tools critical to parish development. Parish leaders will learn new models of ministry most relevant to their specific communities through results-oriented training designed to create healthy, vibrant and outward-looking congregations. This learning will require a commitment across the diocesan family to free up clergy and lay leaders' time for ongoing, specific training.

Following rigorous and disciplined strategic planning, parishes will have access to resources and more fully trained clergy and laity able to apply their training to meaningful use where it is most needed and can produce results.

The following methodology, designed to enhance parish-based ministry, will ensure that effective strategic planning is supported by results-oriented training:

1. A comprehensive study of the diocesan family will be made available to all parishes for planning and evaluative purposes;
2. Each parish will be encouraged to create a customized action plan outlining training/development initiatives designed to deliver results for their specific needs.
3. At the request of individual parishes, multi-disciplinary consulting teams will be available and trained to offer appropriate expertise drawing upon relevant data;
4. Parishes will be able to choose from a menu of training/skills development necessary to the delivery of their initiatives;
5. The action plan will be evaluated in relation to its projected impact on the measurable signs of a healthy parish referred to above.

## THE BUILDING BLOCKS

To respond to the serious and varied challenges confronting our parishes, our implementation strategy is founded on three interlocking building blocks – Education and Training, New Ministries, and Outreach.

### EDUCATION AND TRAINING FOR LEADERSHIP IN THE CHURCH

**\$4,000,000**

*“We realize the problems that are out there. What we’re looking for are solutions that have nothing to do with bricks and mortar. We need expertise, parish leaders that can leverage knowledge and learning to make sure we’re around for the next hundred years.”*  
Parishioner

The success of the *Survive and Thrive Campaign* will allow us to invest in areas of training and development that encourage parish growth, enterprise, and initiative. This could include programs of the following nature:

#### Evangelism and Marketing

We expect to finance many applications for new ways of communicating with and engaging the unchurched in our communities. We will invest in parish-focused training of clergy and laity to invigorate leadership with new skills in both evangelism and marketing – skills appropriate for the realities of individual parishes.

For example, parishes may determine through their action plans that new signage will increase their profile in their localities. Seed money for these initiatives would be made available. We would also plan to fund pilot projects testing the effectiveness of advertising to the unchurched using the strategic planning and creative skills of communications specialists. The results of these tests will then be made available to every parish in the diocesan family for use where appropriate.

#### Preaching and Worship

We will finance training to raise the standard of preaching and presentation of the Gospel. Finding new opportunities to make the Gospel message and worship more relevant to growing numbers of diversified people is essential. Fundamental to our future is training and skills development that will help us welcome newcomers into a life of common worship within supportive parish communities.

Our commitment to raising standards and relevance will involve access to top-flight homiletics and liturgical specialists. For example, an annual diocesan preaching symposium would be endowed. Parishes will have access to liturgical consultants who will evaluate existing worship, identify opportunities and suggest alternative worship options for consideration.



### Leadership and Communication

We will invest in human resource management to match skills with challenges and opportunities for the renewal of our faith communities. For example, access to professional counseling and training will improve our effectiveness in managing and encouraging growth at all levels.

### Post-ordination Training

We will support training programs for supervisors and lay leaders and ensure newly ordained clergy are prepared for effective ministry in both rural and urban areas. This commitment may entail a review of current internship programs suggesting creative alternatives for leadership.

### Stewardship Development

To build on the success of the year-round stewardship programs, we intend to continue to provide seed money and tools to help laity and clergy increase resources for new ministries in our local parishes. Workshops, consultants and other resources will help parishes more effectively organize their mission and ministry.

### Upgrading Training Facilities

With the increased commitment to Education and Training in our vision for the future, the success of the *Survive and Thrive Campaign* will enable us to dedicate seed money to Canterbury Hills for their planned facilities expansion.

**INVESTING IN NEW MINISTRIES FOR GROWTH****\$3,000,000**

*“Invest in our future, rather than dream of our past. Plan for new ministries to reach out to the unchurched who need to know the Jesus we know, who need to hear of our Saviour’s love.”*

Bishop Ralph Spence

Many of the old ways of doing ministry are no longer effective in our rapidly changing world. We must be creative in exploring innovative forms of community ministry that will generate growth for existing parishes while opening doors for new faith communities. Initiatives will respond to critical pastoral needs with the goal of self-sufficiency. Funding will be used as seed money or as a catalyst for self-sustaining change.

*Children’s and Youth Ministries*

We must increase our commitment to our children and youth. The future lies with our young people. We will finance the development and implementation of relevant children’s and youth ministries that will require appropriate programs, facilities, and the ongoing training of clergy and laity.

Initiatives will be developed from parish action plans while drawing upon the expertise of specialists available to the diocesan family. These specialists may be shared by clusters of parishes for both short-term training and longer-term purposes.

*Specialized Positions to Support Parish Growth*

Currently curates tend to be placed only in parishes, which can afford them. To address this situation, we will dedicate resources for specialized positions that match parish needs with individual skills and talents. Resources will be available for parishes seeking to establish innovative missions for growth and renewal. Options may include creating and funding positions that serve clusters of parishes in a region, rural or urban. For example, three or four parishes might share an evangelist, pastoral care worker, Christian education leader or youth worker. A high-potential suburban parish that, due to lack of resources, finds itself unable to capitalize on new home construction could apply for funding to access appropriate expertise.

In all cases to successfully invest in new ministries, we will only fund research that guarantees results – research based upon demographic analysis, disciplined planning and implementation strategies. Whether we are investigating improving existing facilities, establishing new churches or land banking, we will act upon information that will help us create our future.

Financing essential new missions in our communities requires that we set aside resources for land, design and building projects. We will strike a balance between long-term endowment and immediate spending to best enable us to transform our vision into reality.

**OUTREACH IN THE NAME OF CHRIST****\$1,000,000**

*“ Shining as light in the darkness, we celebrate and proclaim the power of God’s renewing love. To this end we think globally and act locally, working with other groups – ecumenical, interfaith and secular – to renew our world in peace and justice.*

The Division of Outreach mission statement

*If we don’t do outreach, we might as well just close our doors”* Parish Rector

Our vision of creating fiscally healthy, spiritually vibrant, and outward-looking faith communities is dependent on a sustainable, increased commitment to Outreach. We need to support the development of local solutions for local concerns. These proposed solutions will be linked to parishes’ strategic plans and designed to encourage parishes to carry out their baptismal ministry and mission to love, heal and transform our broken world.

Our outreach initiatives reflect the social justice component, which lives in the Gospel, our desire to create and strengthen responsible relationships, which promote justice, peace and the stewardship of God’s creation. We will resource local outreach programs within our diocesan family that do not duplicate the work of other agencies. The *Survive and Thrive Campaign* will enable us to create an endowment for seed money destined for parish-based initiatives that will encourage parishes to become more outward looking.



## CONCLUSION:

### A CALL TO ACTION TO SURVIVE AND TO THRIVE

*“The Gospel is our message: a changed, renewed Church is my vision. A church that will be able to step forward into the unknown of the next century – stretching the view of who we are in liturgy, in buildings, in structure – but it is the Gospel we take into the future unknown.”*

Bishop Ralph Spence

What will our ministry look like in the new century? Every parish in the diocesan family is unique. By God’s grace, each parish must discover for itself what it means for them to become more healthy, vibrant, and outward looking. The success of the *Survive and Thrive Campaign*, measured by the achievement of our \$8,000,000 goal, will provide the resources for each parish to discover and, together, turn this vision into reality. If we summon the courage to imagine, the will to succeed, and the faith to sustain us, our ministry will become more dynamic and revitalized. With the appropriate resources in place, we can embrace this call to action together as a family, capitalize on our strengths and respond joyfully to the undeniable challenges of the new century. We have gifts to share – the Gospel of Christ and the compassion of the Anglican Church.

## Appendix 2



Spreadsheets  
Detailing Campaign Grants  
by Location and Type

## Appendix 3

### Samples of Parish Evaluations\*

- St. Mark's, Orangeville
- Church of the Transfiguration, St. Catharines



*\* These sample evaluations are included in this report to give the reader a sense of the type of evaluation parishes were required to submit annually.*