



Frequently Asked Questions

1. Q: What is a capital campaign?

A: A capital campaign raises money over time for a special project. It is a process by which people unite to achieve a common goal and to accomplish something extraordinary. A capital campaign is conducted only when necessary in response to matters of significant need. It is above and beyond annual giving and often involves gifts of annuities, real estate, trusts, life insurance, securities or other assets, as well as regular income.

2. Q: What is the stewardship campaign and how is it different from the capital campaign?

A: The annual stewardship campaign raises funds via pledges to cover the costs of the annual operating budget of UUCA. Your annual pledge supports the ongoing mission of UUCA. It funds the essential expenditures such as programming, salaries, and benefits — as well as providing facility rental. A capital campaign pledge, meanwhile, will support only the projects outlined in the capital campaign viewbook.

3. Q: What is “Building a New Way...Together”?

A: This is the name and theme of our special, combined campaign that reaches out to every member and friend of UUCA to talk about both their annual stewardship pledge and their opportunity to give to the capital campaign. By combining, we make the process easy for all and anticipate strong results for both components.

4. Q: Why has UUCA has worked with two different consultants to advance the capital campaign?

A: From the earliest planning stages, UUCA leaders were committed to following the best practice of using experienced consultants to 1) conduct a feasibility assessment and 2) guide the implementation of the capital campaign. At no point in time did the leadership believe we should try to run a capital campaign by ourselves without outside expertise.

Last year, UUCA engaged Coxe-Curry and Associates — a fundraising consulting firm that serves nonprofit organizations — specifically for the first stage: a feasibility assessment to help inform the emphasis and scope of the final renovation project. As part of that engagement, Coxe-Curry prepared a case statement brochure and conducted 35 interviews with a sample set of congregants to gauge interest in various aspects of the property improvements. The firm provided a full report on its findings about attitudes



and preferences, and recommended UUCA proceed with a capital campaign and proposed target of \$2.2 to \$2.5 million.

While planning for the next stage, Rev. Strauss spoke with colleagues in several UU congregations that had recently completed capital campaigns. Overwhelmingly, she heard that James D. Klote & Associates was a highly trusted and successful group with a strong focus on fundraising for churches and faith-based organizations, and exceptionally experienced in working within UU congregations. The Campaign Steering Committee further researched Klote & Associates and held several conversations with members of their team. They learned about Klote's hands-on methodology and its track record of typically raising at least five times annual giving in a capital campaign. The Steering Committee then recommended to the Board of Trustees that they engage James D. Klote & Associates for the implementation stage of the campaign, which the Board unanimously voted to do. Glenn Wagner was assigned by Klote to serve as UUCA's campaign director.

The feasibility study and other research produced by Coxe-Curry were among the first documents used by our campaign director in preparing for the campaign rollout. Building on learnings from the first stage, the campaign is engaging the entire congregation via focus groups and personal visits. Over 215 people have participated in the readiness assessment of the second stage.

5. Q: What is the financial goal of our capital campaign?

A: The goal of this campaign is to raise \$4 million, which when combined with around \$2 million already in the building fund will cover the total estimated project cost of \$6 million.

6. Q: How was the target goal of \$4 million for the capital campaign set?

A: The Capital Campaign Steering Committee, in close coordination with the Board of Trustees, decided to set a goal of \$4 million for the campaign for two main reasons.

First, the most recent set of plans for the renovation includes what the congregation wants for UUCA's new campus. To fund this set of plans requires that we raise \$4 million. We believe the capital campaign should aim for this rather than forego essential features of the campus that the congregation wants.

Second, given James D. Klote & Associates' track record of securing five times annual giving or more at hundreds of churches, including many Unitarian Universalist congregations, we believe that UUCA can raise this amount with the firm's expertise and our aspiration. UUCA is at an important juncture in our history and our future, and it is important to have the building that matches our ambitions.



7. Q: What happens if we don't raise \$ 4 million?

A: Our goal is to reach or surpass the target of \$4 million so that we can move forward with our planned project. The results of the campaign will determine our next steps. If we fall short, alternatives around financing or phasing certain steps may be considered by the Board.

8. Q: Can funds given to the capital campaign be used for anything else?

A: No. They are restricted funds and can only be used for the proposed plans presented in the campaign.

9. Q: What will happen if we exceed the \$4 million goal?

A: First, we will celebrate! Second, there are additional updates and upgrades to the building which would be added to the project. The amount of monies available will determine how much more can be completed on the building and grounds.

10. Q: What is financial goal of the stewardship campaign?

A: The goal of stewardship campaign is to raise \$750,000 to use towards the 2021 annual operating budget.

11. Q: Why is the proposed annual budget going up 6%?

A: We want to add a second minister to the Pastoral Care program and continue to expand our ministries. We want to continue our growth trajectory as we move towards fulfilling our mission as an impactful center for faith and justice.

12. Q: Who is being asked to support the capital campaign?

A: Everyone who is a part of UUCA family. This includes current members and friends, as well as some former members and friends or their families, who, based on recommendations made, may be interested in supporting the future of UUCA.

13. Q: Has a committee researched my financial capabilities?

A: No. That is confidential information which the committee doesn't have access to.

14. Q: Will the monies pledged to the capital campaign be used for anything other than the proposed plans?

A: No. Gifts to the capital campaign are restricted funds and therefore can only be utilized for the proposed plans.

15. Q: Will the monies pledged to the capital campaign be kept separate from my other offerings?

A: Yes.



16. Q: Should we give less towards our annual giving to give to the capital campaign?

A: No. We are counting on our current (and growing) giving levels to enable us to accomplish current ministry at current levels.

17. Q: Is it necessary to have someone visit us?

A: It is important that every member or friend receive a visit either in person or via Zoom. UUCA is your home and it is important that you understand the vision. This is better explained in person rather than via a brochure or letter and ensures that everyone has an opportunity to receive firsthand information and provide feedback.

18. Q: How do we make a pledge?

A: You will be visited by a fellow congregant who has volunteered to help with the campaign. They will explain the plans for the campaign in more detail and will give you an opportunity to ask questions so that you fully understand UUCA's mission. They will ask you to make an annual stewardship pledge and will suggest a specific gift to the capital campaign for you to take into consideration in making a pledge to the capital campaign.

19. Q: Can pledges be given in assets other than cash?

A: Yes. For both annual and capital pledge, giving appreciated financial assets (stocks, bonds, trusts, life insurance, annuities, etc.) and appreciated real estate are especially beneficial, because the donor may enjoy certain tax advantages, particularly when given directly to the church for sale by the church. The charitable deduction value of a gift of appreciated assets is the asset's value at the time of the transfer to the church. Gifts of real estate should have clear titles and require an assessment by the church before the gift is accepted.

20. Q: How much time do I have to fulfill my capital campaign pledge?

A: We are suggesting that you consider a pledge that can be fulfilled over a period of 3 years or less. The earlier you can begin paying the pledge, the better it will be for UUCA since there are immediate costs involved. You can determine the installment plan that work bests for you and your family.

21. Q: How long do I have to fulfill my 2021 annual stewardship pledge?

A: Annual pledges made during the 2021 Stewardship campaign are payable over 12 months beginning in January 2021. The pledge payments can be submitted in weekly, monthly, quarterly or annual installments as you decide is best for you.

22. Q: Do pledges to the campaign have tax advantages?



A: Yes. All contributions made to UUCA are tax deductible, however it is always important to consult your tax accountant or financial planner for details on your specific situation.

23. Q: When will we need to make a pledge?

A: Since the campaign is scheduled for a limited number of weeks, it is important that pledges be made as quickly as possible after you have been visited. Take all the time you need, but please hurry! Most people find they can make this decision within one week.

24. Q: When would we begin making payments towards our pledge?

A: Capital campaign payments may begin immediately after you make a pledge or at a time more comfortable for you. We only ask that you pledge what you believe you can fulfill over the three-year pledging period. The earlier you begin, however, the better it will be for UUCA since there are necessary expenses now. Most payments on annual pledges will begin in January and go through December 2021, but early payment is an option for those who prefer it.

25. Q: How do we pay for the construction if the funds take three years to collect?

A: Pledges are payable over three years, but we hope to receive half the funds in the first year, before construction begins. Pledges include information about when and how payments will occur. From that, leadership can determine available funds and perhaps consider a bridge loan to ensure the necessary cash flow for the project.

26. Q: Is it necessary to sign a pledge form?

A: Yes. A signed pledge form is essential to confirm our pledges, to finalize plans for the project, and to be able to project our anticipated cash flow. Pledges are not viewed by UUCA as legally binding, but rather as a statement of your best intentions.

27. Q: Who will know how much we pledged?

A: The information is given in confidence to only a small number of people who will receive, record, and track gifts. These individuals have been trained on maintaining confidentiality. Essentially, your pledge is confidential.

28. Q: Why are members and friends being asked to consider a specific gift size for the capital campaign?

A: It is one thing to be supportive of a project. It is quite another to be supportive at a level that will actually make the vision become a reality. Since no one person is going to give the entire amount, we believe it is both transparent and honest to share with each person what it's going to take — from each of us — to transform that vision into a reality. The need is very large; therefore, inspirational gifts will be required in every dollar category in order to reach that goal. Informing everyone of how their individual



participation **may** fit into the “big picture” identifies a level of giving that can guide each person in determining their own participation.

29. Q: How were the capital campaign “ask” amounts determined?

A: Successful capital campaigns are built around a scale of different sized gifts based on the previous experience our director has had with other churches like us. If UUCA is to reach its goal, a certain number of gifts will be required at every level (from \$1000 to \$500,000 and more). A group of trained volunteers who have already made their pledges have suggested families within the congregation who may be able to reach giving levels similar to their own. That information, as well as a family’s previously demonstrated commitment to UUCA, help form a partial picture. Everyone is being asked to consider a specific level of giving that will be both challenging and inspirational — and will help UUCA reach its goal. In the end, however, each family must consider for themselves what their gift will be. Whatever you decide to do is the right thing.

30. Q: How do I know how much to pledge to Stewardship?

A: UUCA recommends using the Fair Share Giving Guide to help determine what level of giving is right for you. It is a personal decision, but one that is very important to the planning of our annual budget. It is important to pledge an amount you can fulfill in 12 months or less.

31. Q: How will we know how much to pledge?

A: While each of us will be asked to give generously, only you know what amount to give or how to structure your commitment over the three-year pledging period. We can’t all give at the same level. Some have more or less than others. You will discover that thinking through your pledge will allow you to begin a process of personal discovery to determine your own level of generous giving.

32. Q: Is it better to be “cautious” or “optimistic” when making my pledge?

A: The campaign committee’s advice is to be “reasonably optimistic” regarding your pledge. The record of your pledge is not a legal document, but a statement of your best intentions. UUCA will try to make reasonable plans for the future based on the total amount pledged. In this case, being overly cautious could be just as much of a challenge to the planning process as being overly optimistic. To help UUCA’s planning process, our advice is to be *reasonably optimistic*. If you think that “We’ll probably be giving more,” then it would be helpful to indicate that amount on the pledge form now, rather than later.

33. Q: I have a lot going on right now. Do I really need to make a pledge now?

A: Our lives are very challenging. Each donor will need to make a decision that is best for themselves and their family. We only ask that you also consider the best interest of the



UUCA family in your decision as well. Pledging during this campaign is important for UUCA's future and our new home. Submitting a pledge is quick and easy process which provides UUCA with a *forecast* of your payment plans.

34. Q: Who is in charge of the Building the New Way Together campaign?

A: A steering committee for the campaign was created to ensure we run an effective effort. It is made up of members of the capital and stewardship committees, including Board liaisons, is led by our capital campaign director Glenn Wagner, and is accountable to Rev. Taryn Strauss and to the Board of Trustees. This steering committee is responsible for the fundraising and is not involved in the planning or design of the building and grounds improvements at the new campus, which falls to the Project Phoenix team.

35. Q: How many people need to participate in order for this to be successful?

A: Our hope is 100% participation. It will take all of us, working together, to reach the goal.

36. Q: Can we really raise this much money?

A: The experience of our capital campaign director, UUCA's enthusiasm for the new campus, and our present level of stewardship would suggest that meeting the need will be challenging, but possible. It will, however, require acts of significant and inspirational giving by our members and friends. Those families with above-average ability to give will be instrumental in setting the stage for reaching and perhaps surpassing our campaign goal. The success of an appeal will require inspirational financial support from all members of the church. We are using a proven methodology to engage every member and friend of UUCA in the vision for and support of the goals of the campaign.

We are delighted to have a highly experienced campaign director, Glenn Wagner, who is working in close partnership with Rev. Strauss and the Capital Campaign Steering Committee to achieve best results. Glenn has temporarily moved to Atlanta and is working full-time on-site in the Tree House, embedded as an extension of the UUCA staff. At just a bit over 5.3 times UUCA's annual giving, the \$4 million it is very achievable. Much will depend on how each one of us responds to this vision and need.

37. Q: Have we considered taking out a mortgage?

A: One goal of congregational leadership is not to take on long-term debt, and we do not wish to take out a mortgage. The preference is to remain debt-free outside of short-term bridge financing. However, we have not ruled out financing and may consider this in the future.



38. Q: Where will the remaining \$2 million needed for the project come from?

A: When we sold the Cliff Valley property, the income from the sale after expenses went into a special fund to finance our new home. We used a portion to purchase the property on N. Druid Hills Road and to finance the preparatory stages for Project Phoenix. We have over \$2 million in the account, which is earning interest. However, with more anticipated expenses down the road — including, but not limited to, architectural and permitting expenses — we project having \$2 million on hand to begin the project.

39. Q: How can I make sure the monies I give go to the capital campaign?

A: Write your check out to “UUCA” and put “**capital campaign**” on the memo line of your check. Or you can give online through [UUCA's website](#) by selecting “*Capital Campaign pledge payment*”.

40. Q: Assuming we make our goals, when will construction begin and when can we move in?

A: With a successful capital campaign, we hope to be able to begin work as soon as possible, potentially as early as December. With a projected construction time of 10 months, we hope to move into our new home before the end of 2021.

If you have further questions or would like to provide feedback, please contact UUCA's Capital Campaign Steering Committee via email: capitalcampaign@uuca.org