



NEW ENGLAND CONFERENCE OF THE UNITED METHODIST CHURCH TOGETHER FOR TOMORROW CAMPAIGN POLICIES

1. Campaign Executive Committee and Campaign Costs

- a. A Campaign Executive Committee (hereinafter "CEC") of key clergy and laity will be recruited to oversee all activities related to the campaign.
- b. The conference will advance all funds for the conduct of the campaign (professional counsel, materials, etc.). The local churches will share an obligation for these costs, capped at ten percent of funds raised at the local level.¹ Conference shall be reimbursed for expenses prior to disbursement to local churches.

2. Full Church/Congregation Participation

- a. All churches will be asked to participate in the Together for Tomorrow Campaign in an appropriate block of activity between April 1, 2005 and May 31, 2006.
- b. Funds should be sought over and above current giving to ensure that future church regular income is not jeopardized.
- c. Churches will be asked to conduct their campaigns within the conference's established pilot and bloc campaign timetable. This format should provide flexibility and should accommodate all situations.
- d. Each church will be asked to adhere to the campaign plan, mechanics, and methodology and demonstrate a "good faith effort" toward achieving its campaign goal.

3. Combined Church Campaigns

- a. The conference recognizes that some churches may have extraordinary (extraordinary is defined as a sum at least equal to the amount of the conference-suggested local church's goal) local needs and therefore may consider conducting local capital fundraising efforts in conjunction with the Together for Tomorrow Campaign. This situation will be referred to as a "combined campaign" and all such combined campaigns are asked to seek approval no later than one month prior to the anticipated start date from the CEC.
- b. A church seeking to conduct a combined campaign guarantees the entire conference-specific portion of the standard church goal (see "Formula for Establishing Standard

¹ If the costs of the campaign, after all districts have run their campaigns, represent less than ten percent of dollars raised, then the New England Conference of the United Methodist Church will issue partial refunds to those churches that paid ten percent.

Church Goals” below). Also, combined campaign goals normally will not exceed two times the church’s conference-suggested goal for a standard campaign.

- c. A subcommittee of the CEC, the Goal Review Committee, will review requests made in writing to conduct a combined campaign and will make recommendations on same to applicants.

4. Church Goals

- a. Each church will be asked to assume a fundraising goal that represents a fair share of the conference-wide goal.
- b. Church goals are not assessments, but rather targets that can be realized with a good faith effort.

5. Formula for Establishing Standard Church Goals

- a. A church’s standard goal will equal 160% of its 2004 Mission Share rounded to the nearest \$5,000.²

6. Goal Setting and Review Process

- a. The following process is recommended for establishing church goals:
 - i. The Goal Review Committee (hereinafter “GRC”) will be established.
 - ii. Preliminary goals will be calculated using the formula presented in “Formula for Establishing Standard Church Goals” (160% of 2004 Mission Share rounded to the nearest \$5,000).
 - iii. Preliminary goals will be reviewed by the GRC, and may be adjusted based on local prevailing conditions.
 - iv. The GRC will submit goals to the CEC for approval.
 - v. Churches will be asked to accept the suggested goals.
 - vi. A deadline (three weeks from postmark of the letter) will be set for goal adjustment requests by letter from the pastor.
 - vii. The GRC will entertain appeals for reductions and make recommendations on these appeals to the CEC.
 - viii. All goals will be finalized after review of requests for adjustment.
 - ix. Churches that appealed will be notified of final goals.

7. Individual Church Case Statements

- a. All churches are asked to prepare a “case statement” explaining how their local share of the funds raised will be used.
- b. The District Superintendent shall approve the use of local funds raised.

8. Member Information

- a. To ensure a smooth flow of data collection throughout the capital campaign, all churches will be asked to comply with campaign office requests for specific member data in electronic form. Member data should include, but not be limited to, name, address, phone number, annual support, and other pertinent information. This information will not be shared outside of the conference.
- b. In cases where churches employ appropriate third parties (envelope companies) to collect and manage such data, the CEC recommends pastors authorize such third parties to release requested data to the Together for Tomorrow Campaign Office.

² The minimum goal for any church is \$5,000.

9. Formula for Sharing Funds Raised

- a.** Sharing of funds will be made on the basis of cash received throughout the pledge redemption period, after campaign expenses are repaid.
- b.** Churches will share in the proceeds of their church campaigns according to the approved church case statement. There are two basic types of church campaigns:
 - i. Standard campaign:** In a standard campaign, the proceeds will be shared 77.5% to the conference and 22.5% to the local church, from the first “net” dollar received up to the target. As soon as the church exceeds its conference-suggested goal, the sharing formula will be 22.5% conference/77.5% local church on over-goal net funds raised.
 - ii. Combined campaign (extraordinary local need):** In a combined campaign, the proceeds will be shared as follows: in exchange for guaranteeing the conference share of the conference-suggested goal, net proceeds over the target will go to the local church.

10. Disbursement of Funds

- a.** Funds raised in the local churches conducting standard campaigns will be returned six months after the completion of the campaign at the church, based on the sharing formula and the cash received (after expenses) at the time of disbursement.
- b.** Funds raised in churches conducting combined campaigns will be returned six months after the completion of the campaign at the church, based on the sharing formula and the cash received (after expenses) at the time of disbursement.
- c.** After the initial disbursement, funds will be returned to churches on a semiannual basis as cash on pledges is received.

11. Gift Acknowledgement

- a.** All gifts and pledges made to the campaign must be formally documented in writing by the donor or his/her designee.
- b.** All gifts and pledges will be acknowledged by the local church and the conference and the collection of pledges will be the responsibility of the conference.
- c.** A Campaign Stewardship Committee will be established and chaired by a member of the CEC.

12. Designation of Gifts

- a.** Requests for support should be broad in nature and should encourage unrestricted support to the local church (22.5%) as well as to the conference-wide objectives (77.5%).
- b.** Individual commitments of \$25,000 and above may be designated to Camps and Retreat Ministries, Congregational Development, Pastoral Retirement, and International Missions.
- c.** Undesignated funds will be attributed to any or all of the five components in order to ensure that all five of the campaign objectives are fully funded.

13. Major Gift Solicitations

- a.** All major gift prospects (\$25,000+) are asked to be cleared by and assigned to solicitors through the Together for Tomorrow Campaign Office. Prospects will include but will not be limited to:

- i.* Past special gift donors;
 - ii.* Camps and retreat center, conference, foundation, and individual major gift prospects; and
 - iii.* Past significant individual donors at the church level.
- b.** No prospect will be solicited without proper clearance and an appropriate strategy.
 - c.** All prospects will be visited in person by the appropriate and approved volunteer(s) and/or staff and presented with a specific and personalized proposal.
 - d.** All \$25,000+ requests will be coordinated carefully. Preferably each \$25,000 prospect would receive just one comprehensive gift request amount. In most cases, this request will incorporate a three-to-five year request for support of the following:
 - i.* Conference-specific; and/or
 - ii.* Specific support for a participating conference agency or institution.
 - e.** Some gifts may include a planned gift component to benefit the published case statement objectives.

14. Crediting of Gifts to the Conference Campaign

- a.** All gifts and pledges to the New England Conference of the United Methodist Church in support of the published case statement objectives through 2006 will be counted toward the campaign goal.
- b.** Unrestricted bequests received by the conference during the campaign will be credited toward the campaign goal. Individuals who are 70 years of age or older as of the time a gift is made will receive campaign credit for confirmed outright bequest provisions and/or life insurance policies.
- c.** Gifts of paid-up life insurance policies will receive campaign credit for the cash value of the policy.
- d.** Irrevocable life income gifts (unitrusts, annuity trusts, pooled funds and gift annuities) made during the campaign will receive full campaign credit, as recommended by the crediting policies of the Council for the Advancement and Support of Education (CASE) and the Financial Accounting Standards Board (FASB).
- e.** All annual payments of a charitable lead trust made during the campaign pledge period will receive campaign credit.
- f.** Gifts of real estate and personal property (such as paintings, antiques, sculptures, etc.) will be credited at the appraised value of the gift at the time it is made, provided there is no restriction on its sale.
- g.** Campaign pledges will be paid on a schedule established by the donor, preferably within a five-year period of the date of the pledge. However, the hope is that all pledges can be made within three years of the end of the intensive campaign solicitation phases.

15. Crediting of Major Gifts (\$25,000 or more)

- a.** All gifts of \$25,000 or more secured by the Bishop, CEC members, pastors, or local church volunteers will be reviewed on a case-by-case basis by the GRC for allocation to the donor's local church goal.³

³ A church is not relieved of its obligation to make a good faith effort in running a campaign because a single family makes a campaign commitment equal to or greater than the local church's conference-suggested goal. Leadership or major gifts will count *up to* 50% of a local church's conference-suggested goal in an effort to encourage church-wide participation. The local church will still receive its 22.5% of the net amount of such a family's leadership or major gift.