
Capital Campaign Planning Guide

A Step-by-Step Framework for Church Building Fundraising

Prepared by Hawkey Church Management Inc.

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Hawkey Church Management Inc. (HCMI) provides expert construction management services for churches and religious organizations across Ontario. With decades of experience guiding congregations through the building process, we combine construction expertise with a deep understanding of ministry needs.

Capital Campaign Planning Guide

A well-planned capital campaign is the cornerstone of any successful church building project. Unlike annual giving, a capital campaign asks congregation members to make sacrificial, above-and-beyond commitments—typically over a three-year pledge period—to fund a specific vision for the future. This guide walks your leadership team through each phase of a comprehensive capital campaign, from early preparation through long-term follow-through.

Most successful church capital campaigns raise between one and three times the congregation's annual giving. Understanding your capacity is the first step toward setting a realistic goal.

HCMI TIP: *HCMI recommends beginning your capital campaign planning at least 12 months before your anticipated construction start date. This allows time for a thorough feasibility study, leadership recruitment, and the campaign itself before breaking ground.*

Phase 1: Preparation (3–6 Months Before Launch)

The preparation phase establishes the foundation for your entire campaign. Rushing this phase is the single most common reason campaigns underperform.

Assessing Congregational Capacity

Begin by reviewing your congregation's current giving patterns. Analyze three years of contribution data to understand trends, identify major donors, and assess the depth of your donor base. Consider:

- Total annual giving (tithes, offerings, and designated gifts)
- Number of giving units and average gift size
- Percentage of congregation that gives regularly versus occasionally
- Historical response to special appeals or previous campaigns
- Economic conditions in your community and among members

Selecting Campaign Leadership

Your campaign chairperson should be a respected, well-connected member of the congregation who is not the senior pastor. The chair should be someone who has already made their own significant financial commitment to the project. Build a campaign committee of 8–12 people representing different demographics and ministry areas within your church.

Engaging a Campaign Consultant

Professional campaign consultants bring expertise and objectivity. They can guide your timeline, train solicitors, and help avoid common pitfalls. When selecting a consultant, look for:

- Specific experience with church or nonprofit capital campaigns
- A track record of campaigns in similar-sized organizations
- References from past clients you can contact directly
- A clear fee structure (typically 3–5% of campaign goal)
- Willingness to work within your denominational and theological context

Conducting a Feasibility Study

A feasibility study involves confidential interviews with 30–50 key stakeholders and potential donors. An independent third party (often the consultant) conducts these interviews to gauge willingness to give, concerns about the project, and perceived leadership credibility. The study will help you set a realistic goal and identify potential obstacles before launch.

HCMI TIP: *We frequently see congregations skip the feasibility study to save time or money. In our experience, this almost always leads to an unrealistic goal and a campaign that falls short. Invest in this step—it pays for itself many times over.*

Phase 2: Campaign Design

Setting the Goal

Your campaign goal should reflect both your building needs and your congregation's capacity. A stretch goal is appropriate, but it must be achievable. Consider structuring your goal in tiers:

- **Base goal:** The minimum needed to proceed with the project
- **Target goal:** The amount that funds the full vision
- **Stretch goal:** An aspirational amount that allows enhancements

Creating the Case Statement

The case statement is your campaign's most important document. It articulates why this project matters, what it will accomplish, and how it advances your church's mission. A compelling case statement should include:

- A clear vision statement connecting the building to ministry outcomes
- Specific descriptions of how new or renovated spaces will serve the community
- Architectural renderings or conceptual drawings
- A detailed budget breakdown showing where funds will be allocated
- Testimonials from leaders about the project's importance
- A timeline for construction and completion

Designing Pledge Materials

Pledge cards should be professional, easy to understand, and offer multiple giving options. Include spaces for one-time gifts, monthly pledges, and multi-year commitments. Most successful campaigns use a three-year pledge period, which allows families to make significantly larger total commitments than they could with a single gift.

Communication Plan

Develop a multi-channel communication strategy that builds momentum over the campaign's life. This should include pulpit announcements, printed materials, email updates, social media content, and personal letters from the pastor and campaign chair. The key principle is that people need to hear the vision an average of seven times before they act on it.

HCMI TIP: HCMI can provide preliminary construction budgets and architectural concept drawings during your campaign design phase. Having credible cost estimates strengthens your case statement and builds donor confidence.

Phase 3: Lead Gifts (Months 1–2)

The lead gifts phase is critical. Before approaching the broader congregation, secure commitments from your largest potential donors. In most successful campaigns, the top 10–15 gifts account for 40–60% of the total raised.

Approaching Major Donors

Major donor visits should be conducted in person, typically by a two-person team consisting of the pastor or campaign chair and a peer of the prospective donor. These visits are not about pressure—they are about sharing the vision and inviting participation at a level that reflects the donor's capacity and passion.

- Identify your top 20–30 prospective lead donors
- Arrange personal meetings (not phone calls or emails) for the ask
- Present the case statement and answer questions thoroughly
- Allow time for prayer and consideration—do not demand immediate responses
- Follow up personally within one to two weeks

Leadership Commitment

Every member of the campaign committee, the church board, and the pastoral staff should make their pledges before the campaign goes public. When you can announce that 100% of leadership has committed, it sends a powerful message to the congregation about unity and conviction.

HCMI TIP: In our experience managing church construction projects across Ontario, campaigns that secure at least 50% of their goal in lead gifts before launching to the full congregation have a much higher success rate.

Phase 4: Congregation-Wide Campaign (Months 3–4)

With lead gifts secured, you are now ready to present the campaign to your entire congregation. This phase is shorter but more intensive, typically lasting four to six weeks.

Campaign Sunday

Campaign Sunday is the culminating event where the full congregation is invited to make their pledges. Plan a special worship service that celebrates the vision, announces the progress to date (including the lead gifts total), and provides an opportunity for everyone to participate. Distribute pledge cards and provide clear instructions for how and when to return them.

Pledge Options

Offer flexible giving options to maximize participation:

- One-time gifts (cash, cheque, or electronic transfer)
- Monthly pledges over 36 months (the most common structure)
- Annual lump-sum payments over three years
- Gifts of appreciated securities or property
- Estate commitments or planned gifts

Phase 5: Follow-Through

The campaign does not end on pledge Sunday. A three-year pledge campaign requires sustained attention to communication, tracking, and stewardship.

Pledge Tracking

Implement a robust system for tracking pledges and payments. Provide quarterly statements to donors showing their pledge balance and payments received. Most church accounting software has capital campaign tracking modules available.

Regular Updates

Provide monthly updates on campaign progress and construction milestones. Use photos, videos, and site visits to keep the congregation engaged and excited. When donors can see their gifts taking physical form, they are more likely to fulfill their pledges.

Celebrating Milestones

Acknowledge key milestones publicly: reaching 50% of the goal, breaking ground, completing the foundation, the final beam placement, and of course the grand opening. Each milestone is an opportunity to thank donors and reinforce the vision.

Handling Shortfalls

If pledges come in below the goal, do not panic. Options include phasing the project, value-engineering the design, seeking bridge financing, or extending the campaign. HCMI can help you evaluate these options and adjust the construction plan accordingly.

HCMI TIP: HCMI provides regular construction progress reports that can be shared directly with your congregation. Visual updates showing real progress are one of the most effective tools for sustaining pledge fulfillment over a multi-year campaign.

Campaign Timeline Overview

The following table provides a typical 12-month capital campaign timeline:

Month	Phase	Key Activities
1–2	Preparation	Assess capacity, recruit campaign chair, engage consultant
3–4	Preparation	Conduct feasibility study, analyze results, refine goal

Month	Phase	Key Activities
5–6	Campaign Design	Develop case statement, design materials, plan communications
7	Campaign Design	Finalize pledge materials, train solicitation teams
8	Lead Gifts	Begin personal visits with top 20–30 prospective donors
9	Lead Gifts	Continue major donor solicitations, track lead gift progress
10	Congregation-Wide	Launch campaign to full congregation, Campaign Sunday events
11	Congregation-Wide	Follow-up with non-respondents, second appeal events
12	Follow-Through	Final pledge collection, announce results, begin construction planning
13–36	Follow-Through	Quarterly pledge statements, monthly updates, milestone celebrations

Budget Considerations

Running a capital campaign has costs that should be budgeted separately from the building fund. Typical campaign expenses include:

- **Campaign consultant fees:** 3–5% of the campaign goal, or a flat fee
- **Printed materials:** Case statements, pledge cards, brochures (\$2,000–\$8,000)
- **Events:** Campaign kickoff dinner, celebration events (\$1,000–\$5,000)
- **Communications:** Video production, website, signage (\$2,000–\$10,000)
- **Administrative:** Software, postage, supplies (\$500–\$2,000)

As a general rule, plan for total campaign costs of 3–5% of your campaign goal. For a \$2 million campaign, this means budgeting \$60,000 to \$100,000 for campaign-related expenses.

CRA Considerations for Charitable Receipts

As a registered charity in Canada, your church can issue official donation receipts for income tax purposes. Key considerations for your capital campaign include:

- Receipts must be issued for the calendar year in which the gift is received, not when pledged
- Gifts of securities (stocks, mutual funds) receive a tax receipt for the fair market value at the time of transfer and the donor pays no capital gains tax
- Gifts in kind (property, equipment) require an independent appraisal for amounts over \$1,000
- Receipts must include the charity's registration number, the date and amount of the gift, and the name and address of the donor
- Designated gifts toward the building fund are fully receiptable provided the donor does not receive any material benefit
- Ensure your charity's stated objects in its CRA registration cover capital projects and property acquisition

HCMI TIP: We recommend consulting with a CPA experienced in charity law early in your campaign planning. Proper receipting procedures protect both your donors and your charity's status. HCMI can recommend professionals experienced with church construction financing.