

**The James Company**

*Turning Your Vision Into Reality*



**Preliminary Renovation Plans  
& Capital Fund Appeal  
Feasibility Study Report  
November 2016**

**St. John XXIII Catholic Parish**  
**Preliminary Renovation Plans & Capital Fund Appeal**  
**Feasibility Study Report**

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## (1) Introduction

*The James Company* was engaged in August of 2016 by St. John XXIII Catholic Parish in Port Washington/Saukville, Wisconsin to determine the level of support for the proposed renovation plans and determine the feasibility of conducting a capital fund appeal.

Members of the Feasibility Study Team met with Fred Stoltz of *The James Company* to oversee the study. To complete the study, the following activities were undertaken:

- Parish giving records were reviewed by Fred Stoltz.
- An information brochure and survey was mailed to all parishioners.
- Dialogue sessions were held for all parishioners.
- Interviews were conducted with parishioners.
- Final analysis of parishioner feedback occurred resulting in this report.

## (2) Information Brochure and Survey

The information brochure, and its accompanying parishioner survey, was created with significant input from the Feasibility Study Team. A copy of the brochure and survey can be found in the appendix. Included in the brochure an explanation of why the renovation plans were being proposed, a description of the proposed renovation projects including architectural concept drawings, possible project funding, and an explanation of the next planning steps. The brochure included a survey seeking parishioner feedback. Access to the same survey was also provided on-line through the parish website. Through the surveys, we typically hear from some of the more committed members of the parish.

## (3) Interviews

An interview list of 51 households was developed consisting of the larger financial supporters of the parish. All parishioners on this list received a letter from Fr. Pat announcing the desire to conduct an interview. Jackie Adams, of *The James Company*, made the phone calls to schedule the interviews. Fred Stoltz conducted the interviews at the St. Peter parish office, or in a few cases via phone.

- 24 households agreed to an interview with Fred.
- 2 households declined an interview, but shared comments with Jackie.
- 3 households were reached by Jackie but no interview scheduled nor feedback given. One (1) of these households returned a survey.
- 22 households did not respond to Jackie's multiple attempts to contact. Six (6) of these households returned a survey.

From the 33 households who provided feedback:

- 23 were supportive of a capital fund appeal... 9 were uncertain... 1 said "no".
- 19 indicated they would consider gifts totaling \$375,000 to \$450,000. 11 of these suggested gifts ranged from \$15,000 to \$100,000.

## (4) Survey Responses

The parish consists of roughly 1800 households. The number of households giving over \$100 in regular offerings is 1057. During this study we heard from 185 households through interviews and surveys. This is 17.5% of giving households... a sufficient percentage to represent the parish at-large.

The feedback received from the surveys is summarized below. The full details of this survey feedback can be found in the appendix.

### A. Regarding overall support of a capital fund appeal

The third question of the survey asked them to respond to the statement “*I/We would support a Capital Fund Appeal to fund the concept of expanding and renovating our facilities as outlined in this brochure.*” The overall response was:

Yes . . . . . 107 responses (57.8%)  
Uncertain . . . . . 52 responses (28.1%)  
No . . . . . 26 responses (14.1%)

It is important to examine the 52 households who responded “**uncertain**”. Comments shared by 3 or more of the “uncertain” respondents follows.

#### What those who said “Uncertain” liked about the proposed plans

- Agree with the direction of the proposed concepts. (12)
- Plans meet parish & school needs at on one location. (9)
- Expanded space in cafeteria for church/community functions. (5)
- Planning team is doing a good job. Thank you. (4)
- Location of Childcare... separate from school...access to play area. (4)
- Enhanced gathering space at entrance. (3)
- Enhanced security. (3)

#### Questions/comments/concerns of those who said “Uncertain”

- **Concern that parish will be able to raise the money. (12)**
- Concern/curious about school enrollment numbers. (11)
- Concern that parish not meeting operating expenses. (6)
- Consider going below ground... provides more room if needed in future. (6)
- Concerned St. Peter entrance won't feel like a welcoming church. (5)
- What will each family be asked to contribute? (5)
- Concern about amount they can give to a capital fund appeal. (4)
- Concern about the future of St. Mary church. Don't like the trend. (4)
- Wait until we know more about sale of properties. (4)
- 3rd and 4th grade too close to middle schoolers. (3)
- Very expensive. (3)
- Convert St. Peter Church to other spaces. Worship at St. Mary/IC. (3)
- Consider building on Southeast space. (3)
- Need larger choir area in church. (3)

It is also helpful to examine the 26 households who responded “no”. Comments shared by 3 or more of the “no” respondents follows.

What those who said “No” liked about the proposed plans

- Agree with the direction of the proposed concepts. (5)

Questions/comments/concerns of those who said “No”

- Cannot give to a capital fund appeal. (5)
- Concern that parish will be able to raise the money. (4)
- Concern/curious about school enrollment numbers. (3)
- Convert St. Peter Church to other spaces. Worship at St. Mary/IC. (3)

My experience is that many of those who responded “uncertain”, and even a few who responded “no”, will respond favorably to a capital fund appeal if they feel that parish leadership is listening to them.

When gauging whether there is a sufficient consensus to proceed with a capital fund appeal, roughly 60% or more of the respondents should be expressing support of the proposed projects. One-hundred seven (107) said “Yes” in support of the capital fund appeal. In addition, 19 stated support for the direction of the proposed plans, but marked “uncertain” on the survey out of concern for whether the parish can afford such a project. By adding the 19 to the 107, the resulting total is 126, which equates to 68% of the respondents. **There is sufficient support to proceed with a capital fund appeal.**

**B. Regarding the things liked best about the proposed plans (all surveys)**

Following are those positive areas which were mentioned by five or more households. The numbers to the right are the number that voiced the comment in their survey or interview.

**Regarding the Plans in General:**

Agree with the direction of the proposed concepts.	65
Plans meet parish & school needs at on one location.	36
Approve of selling the remaining buildings.	11
Planning team is doing a good job. Thank you.	11
Plans look to the long-term future.	6

**Regarding specific parts of the plans:**

Expanded space in cafeteria for church/community functions.	17
Separation of older grades from younger grades.	12
Full working elevator.	9
Secure outdoor play area.	9
Enhanced gathering space at entrance.	7
Enhanced security.	7
Additional parking.	6
Cost savings to heat and maintain.	6
New school spaces (e.g. STEAM) will attract students.	6

### C. Questions, suggestions, or concerns regarding the proposed plans (all surveys)

Following are questions, suggestions or concerns which were mentioned by five or more households. The numbers to the right are the number of households that voiced the comment in their survey or interview.

Concerned St. Peter entrance won't feel like a welcoming church.	24
Concern/curious about school enrollment numbers.	21
Consider going below ground... if more room needed in future.	13
Consider a larger entrance/gathering space.	10
3rd and 4th grade too close to middle schoolers.	8
Concern about lack of space at St. Mary's for luncheons, etc.	8
Very expensive.	6
Convert St. Peter Church to other spaces. Worship at St. Mary/IC.	6
3 additions seem less efficient than one larger addition.	6
Consider expanding the St. Peter sanctuary.	6
Consider building on Southeast space.	5
Need more storage space.	5

#### Timing

Wait until we know more about sale of properties.	8
Concern that \$ just raised for roof. Too soon to ask again?	8
Delay an appeal.	6

#### Church Finances

Concern that parish will be able to raise the money.	29
Concern that parish not meeting operating expenses.	8
Consider doing project in phases for affordability.	5

#### Personal Finances

Concern about \$ they can give to a capital fund appeal.	10
What will each family be asked to contribute?	6
Cannot give to a capital fund appeal.	5

## (5) Dialogue Sessions Feedback

Roughly 260 people attended parish dialogue sessions held after each of the Saturday and Sunday Masses at all three worship sites between the dates of October 16 - 23, as well as a session on Wednesday evening, October 19, at St. Mary's. These sessions were facilitated by Bob Peiffer, Sheri Murphy, and Mike Weiland. The primary purpose of the sessions was to ask for questions and comments from the parishioners. A complete list of the questions and comments heard during these sessions can be found in the appendix. By and large, the questions and comments raised were consistent with the areas of interest and concern indicated in the survey results above.

## (6) Financial Analysis

The parish giving records were shared and confidentially reviewed by Fred Stoltz. As of August 2016, the parish consisted of roughly 1800 households.

### Regarding regular envelope offerings

- Regular envelope giving in 2015 from current members was \$1,225,746.
  - 1057 households gave \$100 or more
  - 136 households gave \$1 to \$99

### Regarding the *Faith In Our Future* Archdiocesan Campaign

- 375 current members gave \$513,361
  - 5 households combined for \$104,000 representing 20% of the total.

### Regarding the possibilities for a 2016 Capital Fund Appeal

During a capital fund appeal, the parishioners would be asked to pray and consider doubling their current regular envelope giving for the next three years in support of the proposed renovation plans. Some parishioners would be asked to pray and consider leadership gifts of \$15,000 to \$100,000. Using this approach:

- The total amount asked for would be roughly \$3.7 million.
- Gifts from those interviewed may range from \$375,000 to \$450,000.
- **Anticipated Capital Fund giving over three years would be roughly \$1.5 million to \$2 million.**

This goal range would have been higher if it weren't for the following considerations:

- If the survey approval percentage had been in the 75-80%, the goal range would have been higher.
- The parish is in its infancy as a merged parish. There are yet some parishioners who are not inspired to invest in a site beyond the one they worship at.
- The parish just raised over a half-million for the St. Mary's church roof project. For some, it will be difficult to support the proposed renovation project, especially while fulfilling their roof pledge.

## (7) Observations & Recommendations

The following observations and recommendations are made:

- a. There is sufficient parishioner support to initiate a 3-year capital fund appeal. Anticipated capital fund giving over three years would be roughly \$1.5 million, with a stretch goal of \$2 million.
- b. To strengthen the case for the Capital Fund appeal:
  - 1) Promote the anticipated parish-wide benefits of the proposed renovation plans in specific terms that parishioners can quickly and easily grasp (CRE, Adult Formation, Parish social functions, Parish staff collaboration

& efficiencies, etc.) This would hopefully inspire those who feel the proposed project is “all about the school”. This would also hopefully inspire those who attend St Mary’s or Immaculate Conception who wonder why they should support a “St. Peter” project.

- 2) Share an inspiring vision for the future of the school. A frequently expressed concern was over school enrollment trends, and the viability of the parish school. It would be helpful to share a summary of the school’s strategic and financial plans, including past and projected student enrollment. Share how St. John XXIII School currently, and in the future, will be positioned to compete with the public schools. Share how the proposed renovation plans support the school’s strategic plans and contribute to the long-term viability of the school.
- 3) Stress that the current plans will continue to evolve and be re-worked to factor in affordability and the input of the parish:
  - ✓ Regarding affordability, continue to stress that the scope and cost of the final renovation plans will be determined only after we know what we can afford, and a project budget has been set. If renovation funds are tight, indicate that the focus will be on the minimum viable project that accomplishes the key goal of uniting parish ministries on the St. Peter site.
  - ✓ Regarding the importance of input from the parishioners, stress that the design of the renovations continue to evolve and that parishioner input continues to be important. For example, parishioner input has included the following:
    - Concern for a having a welcoming, inspiring, church entrance at St. Peter.
    - Suggestions to consider alternate locations on the St. Peter site for the proposed additions, and to consider including lower level (basement) spaces.
- 4) While remaining appreciative for those who are supporting the roof project, share why it is important to pursue the proposed renovation plans now rather than postponing a couple years, considering the following:
  - Savings in operational costs.
  - Savings from not having to do maintenance/upkeep of the older properties being sold.
  - The renovated spaces would be an important catalyst for building parish unity now that we are one parish. Parishioner to parishioner relationships will grow as they partake in formation and social functions held in the renovated spaces. Parish staff will become stronger as they collaborate at a single site.
  - If we do nothing, the parish and school will likely struggle to grow.

- c. Continue to communicate clearly, and regularly, with the parishioners as to the current status of the renovation project planning, and the next steps about to occur. This includes outcomes from upcoming Parish Pastoral/Finance Council meetings and Archdiocesan Building Commission meetings.

## **(8) Conclusion**

I thank you for the opportunity to serve St. John XXIII Catholic Parish through this study. I look forward to the opportunity to provide assistance with a capital fund appeal. Found in the appendix is a preliminary timetable for a capital fund appeal.

May God continue to bless the parish throughout this planning process.



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