

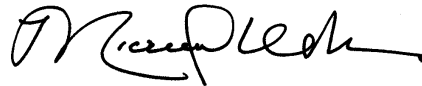
Fundraising Planning Study Report Summary

Presented To

**St. Michael Catholic Church & School
Greenfield, Indiana**

The conclusions reached and recommendations made in this report are based on our analysis of all of the information gathered, responses to our interview questions, and our firm's experience in conducting similar fundraising campaigns.

“...The study indicates the potential to raise a minimum of \$2,500,000 to \$3,300,000 over a three-year period for your proposed fundraising campaign. The study results, together with our conclusions and recommendations, are found on the following pages.”

A handwritten signature in black ink, appearing to read 'Michael A. Walsh', with a stylized flourish at the end.

Michael A. Walsh
President

Walsh & Associates
Church Capital Campaign Specialists

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SUMMARY OF ALL RESPONSES

In all, 151 survey responses were received. A total of 55 individual interviews were conducted, involving 88 individuals. In addition, 63 other surveys were received and are included in our analysis and report. When couples (e.g., husbands and wives) were interviewed or completed surveys together, individual responses were encouraged and many times received. Sometimes too, two answers were given by an individual to a single question. For example, some may have responded that they felt acceptance for a campaign would be "fair" to "good." In this and similar instances, two answers were recorded. In addition, there were times when a person was not able to answer or, if not appropriate or applicable, was not asked certain questions. This explains why the total number of responses does not always equal the total number of individuals interviewed or responses received. In addition, percentages may not add up to 100% due to minor differences in rounding.

1. How satisfied are you with St. Michael Catholic Church and the programs and services the church provides?

| | <u>No.</u> | <u>Percent</u> |
|-----------------------|------------|----------------|
| Very Satisfied | 70 | 44% |
| Satisfied | 67 | 42% |
| Somewhat Dissatisfied | 18 | 12% |
| Dissatisfied | 3 | 2% |

2. How well informed would you say that you've been about the church's needs and plans to improve church and school facilities?

| | <u>No.</u> | <u>Percent</u> |
|------------------------|------------|----------------|
| Well Informed | 49 | 32% |
| Have General Knowledge | 68 | 45% |
| Know Very Little | 24 | 16% |
| Uninformed | 10 | 7% |

3. Overall, how important do you think it is to address these needs?

| | <u>No.</u> | <u>Percent</u> |
|----------------|------------|----------------|
| Very Important | 63 | 43% |
| Important | 60 | 41% |
| Nice to Do | 22 | 15% |
| Not Needed | 1 | 1% |

4. Individually, how would you rate addressing each of these needs and the proposed project's major parts in terms of importance?

| Need | Very Important | Important | Nice to Have/Do | Not Important |
|-------------------------------------|-----------------------|------------------|------------------------|----------------------|
| 1. storm water runoff | 124 / 86% | 13 / 9% | 5 / 3% | 3 / 2% |
| 2. parking reconfiguration | 43 / 30% | 59 / 41% | 38 / 26% | 5 / 3% |
| 3. campus connectivity | 56 / 38% | 34 / 23% | 46 / 32% | 11 / 7% |
| 4. narthex | 60 / 41% | 45 / 30% | 34 / 23% | 9 / 6% |
| 5. new parish offices | 21 / 14% | 57 / 39% | 53 / 36% | 17 / 11% |
| 6. new gathering space Trinity Room | 53 / 36% | 56 / 38% | 27 / 18% | 12 / 8% |
| 7. school improvements | 57 / 40% | 53 / 37% | 30 / 22% | 2 / 1% |
| 8. church interior renovation | 57 / 40% | 55 / 38% | 23 / 16% | 8 / 6% |

5. Were you aware that the church was considering a major fundraising campaign to address these needs?

| | <u>No.</u> | <u>Percent</u> |
|-----|------------|----------------|
| Yes | 124 | 87% |
| No | 18 | 13% |

6. In your opinion, what would be the acceptance level among members for a fundraising campaign that would address these needs?

| | <u>No.</u> | <u>Percent</u> |
|-----------|------------|----------------|
| Excellent | 16 | 10% |
| Good | 86 | 52% |
| Fair | 52 | 31% |
| Poor | 12 | 7% |

7. The cost of the project is estimated to be in the \$7,500,000 range. How much money do you think can realistically be raised from all members and select others in pledges payable over a minimum of three years?

| | <u>No.</u> | <u>Percent</u> |
|----------------------------|------------|----------------|
| \$7,500,000 or more | 10 | 8% |
| \$6,500,000 to \$7,500,000 | 5 | 4% |
| \$5,500,000 to \$6,500,000 | 15 | 11% |
| \$4,500,000 to \$5,500,000 | 17 | 13% |
| \$3,500,000 to \$4,500,000 | 32 | 24% |
| \$2,500,000 to \$3,500,000 | 27 | 20% |
| \$1,500,000 to \$2,500,000 | 17 | 13% |
| Less than \$1,500,000 | 9 | 7% |

8. If a campaign is conducted, do you think you might make a gift?

| | <u>No.</u> | <u>Percent</u> |
|-------|------------|----------------|
| Yes | 91 | 83% |
| Maybe | 18 | 16% |
| No | 1 | 1% |

9. Are you aware of any other campaigns that are in progress or being planned that might conflict with a campaign for St. Michael Catholic Church?

| | <u>No.</u> | <u>Percent</u> |
|-----|------------|----------------|
| Yes | 17 | 15% |
| No | 93 | 85% |

Potential conflicts mentioned more than once included planned, actual or potential campaigns for Cathedral High School, Secina High School and Greenfield Central High School.

CONCLUSION SUMMARY

SATISFACTION WITH THE CHURCH

The level of satisfaction with St. Michael Catholic Church is high at the present time. In fact, 86% of survey respondents overall and 88% of those personally interviewed said that they were either satisfied or very satisfied with the church and the programs and services that you currently provide. This is obviously conducive to a successful campaign.

There were also no sources of significant discontent, which is also conducive to a successful campaign. The decline in enrollment at the school was a concern for some, a few were not happy with recent changes in some Mass times and, in particular, the schedule for religious education. Change is always challenging for some even though Wednesday evening for religious education classes is common in most Catholic parishes today. Some people would also like Father Aaron to be more engaging but believe that a larger gathering space will provide a place for him and others to better connect with one another.

So all in all, this rather high level of satisfaction with the church overall and lack of major sources of discontent should prove helpful to your planned campaign.

RECOMMENDATIONS

1. That you consider completing the project and/or the fundraising for it in two to three phases, if needed, based on what people want, will support and to what extent, as well as what seems to make the most practical sense. What seems to make the most practical sense to us is to complete the new entry drive, parking and drainage improvements, church renovations and the additions of the Trinity Room fellowship space, enlarged narthex or gathering space and relocated parish offices as planned in your proposed first construction and campaign phase and then to come back and complete the planned school or education center improvements in a second successive campaign and construction phase. You could also choose to flip these phases if you'd like which could help to reverse the trend of school enrollment and reaffirm your commitment to Catholic education (which is actually already evident because you have planned for various education center improvements) and then save for a second phase that which will be most visible and exciting to a majority of members which will be the proposed improvements in and around your church. A third and final phase may also be necessary to retire whatever hopefully nominal debt may remain. You could also choose to complete the entire project all at once if/once Archdiocesan funding requirements of having 50% or more of the total project cost on hand are met which would enable you to take advantage of still rather reasonable construction and interest rates, which in a few years, may no longer exist.
2. That you begin the planning and organizational work for your capital campaign as soon as possible, ideally right way and, in any event by no later than the first week of July so that your campaign can be completed by or before the end of the year. This will enable you to take advantage of the high levels of satisfaction with the church, the high level of awareness of and acceptance for the proposed project and its components, the high level of awareness of and acceptance for the proposed capital campaign, and the low level of competition for philanthropic funds that currently exists.

Finally, it will also allow you to capitalize on the momentum gained for the project and campaign through the conduct of this study before enthusiasm starts to wane.

3. That you establish a minimum goal of \$2,500,000 for the initial phase of the campaign effort, which is in line with what we believe you can realistically expect to minimally raise and will, with the \$1 million you already have in hand, enable you to complete either the church or school phases of your planned campaign with little if any debt. We also suggest that a challenge goal of \$3,250,000 be set (which will be more easily achievable if our previous recommendation for conducting a special pacesetting gift phase is heeded), which may enable you to proceed with the entire project (if you are so inclined) and meet most Dioceses' and Archdioceses' fundraising requirements of having to have at least 50% of the total project cost in hand before you can break ground and begin construction. Having this tier type of minimum to ideal goal setting strategy almost assures your campaign's success and the sense of satisfaction that goes along with it, which can have a very positive effect on your project and parish community, while at the same time, it keeps people focused on your ultimate needs and goals and therefore keeps people reaching and from becoming complacent once more minimal goals are met.
4. That you secure or begin to finalize plans and secure concrete cost estimates for the proposed project.
5. That you begin to develop responses to some of the other most commonly raised questions, concerns and suggestions that surfaced as a part of this study, which will then need to be incorporated into the final case statement and various other communications mediums that will be used throughout the campaign.
6. That you develop with our assistance 'giving opportunities' that give people an idea of what their gifts at various levels will enable the church to do. Such opportunities inspire people's generosity and will help you to stimulate substantially larger gifts than you otherwise might get without them.

7. That you recognize all donors to your campaign in some special and significant way such as a donor book or wall to be dedicated and placed in a very visible part of your new and improved facilities such as the new narthex of the church and the lobby of the school facility.
8. That you educate people about and promote planned or creative gifts to the campaign and your church with our assistance. Such gifts may enable your members to make better and more beneficial gifts to the campaign and your church which will be helpful to both you and to them.
9. That as part of the preparation process for your campaign, you have us help organize and conduct a no-fee 'member census' to gather more extensive contact and other information, where needed, for your members which will help you not only during, but after your campaign as well. This census would have as its purpose gathering multiple phone numbers, email and mail addresses for your members to make communicating with them more efficient and effective. This special census can easily be taken as part of your scheduled services over successive weekends by having cards available in people's seats or pews that they can complete and you could then collect. You can also do an all or select member follow-up mailing to those who haven't responded, if desired.
10. That you initiate and implement within three to nine months after the campaign ends, a more formal, holistic and professionally run stewardship program at your church. Such a program should have at its core a strong initial and ongoing educational component emphasizing what it means to be a Christian steward in every sense; it should be led by a sound and well-rounded, standing stewardship committee that will assure that the program is ongoing and holistic in nature; it should have a strong volunteer stewardship component that seeks to get more deeply involved in the life of your church; and it should have a strong financial stewardship component that seeks not only to expand regular weekly giving, but also special and substantial short and long-term gifts to your church.

11. That you begin a school development program, if you haven't done this already, securing the names and contact information for parents and grandparents of school students as well as alumni and parents of alumni of your school, start a continued cultivation and communications program targeted to them including a regular alumni newsletter and reunion program, and that you begin soliciting all of these prospects for annual gifts for the school which could serve as an additional source of operating support, making the school more self-sufficient and less reliant on parish subsidies and/or future increases in tuition. This too, could help to expand your prospect base for future appeals and the second phase of your proposed capital campaign if it involves improvements to your education center and school.