



WALSH & ASSOCIATES

Church Fundraising Specialists[®]

Fundraising Planning Study Report

Presented To

**Holy Spirit Parish
Sacramento, California**

Helping churches and church members reach new heightsSM

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**Holy Spirit Parish
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Walsh & Associates
Church Capital Campaign Specialists®

Confidential

April 18, 2018

Fr. Michael Hebda, Pastor
Holy Spirit Parish
3159 Land Park Drive
Sacramento, California 95818

Dear Fr. Hebda:

I am pleased to submit this report of our fundraising feasibility and planning analysis for Holy Spirit Parish.

The study indicates the potential to raise a minimum of \$1,500,000 to \$2,000,000 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.

This report would not be complete without a word of thanks to you and your church leadership for inviting our firm to conduct this study, which we believe is an important, if not critical, first step to a successful capital campaign. Our special thanks too, for those of you who provided helpful background information and coordinated our interviews.

We look forward to working with you as you implement a successful campaign.

Respectfully submitted,

Michael A. Walsh
President

"Helping Churches Reach New Heights in Their Capital Campaigns"

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TABLE OF CONTENTS

SECTION ASTUDY PURPOSES & PROCESS

SECTION BSURVEY RESPONDENTS

SECTION CSUMMARY OF ALL RESPONSES

SECTION DCONCLUSIONS

SECTION E.....RECOMMENDATIONS

SECTION FSUMMARY OF INDIVIDUAL INTERVIEW RESPONSES

SECTION GSUMMARY OF OTHER SURVEY RESPONSES

SECTION A
STUDY PURPOSES & PROCESS

STUDY PURPOSES & PROCESS

The primary purposes of the fundraising planning study were to determine:

1. The **climate for fundraising** in the church and local community, which involved assessing satisfaction with the church, awareness of and acceptance for your planned project and campaign, and the competitive environment for philanthropic funds at this time;
2. Your **volunteer and volunteer leadership potential** and the names of prospective key leaders;
3. Your **financial potential** and the names and estimated gift potential of prospective key donors;
4. The **best way to prepare** for and/or proceed with, package and promote your project and campaign effort in order to achieve optimal results and ultimate success.

The study process involved six phases or steps:

1. **Preparation.** During this initial phase of the study process, an overall study strategy and schedule was developed; relevant information about your project and campaign was gathered; a preliminary case statement outlining your needs and plans was prepared; survey questionnaires were developed; candidates for confidential interviews were selected; a phone script to be used to invite them to participate in the study was outlined; and interviews were scheduled.

2. **Informational Meeting.** Prior to commencing with member surveys, members were invited to church-wide informational meetings to learn more about your project and campaign.

3. **Individual Interviews.** We sought to interview up to 45 of some of your most active and generous members, who are the most important people to listen to and hear from because they have the greatest influence on any church campaign's success. During this phase of the study, a total of 34 confidential interviews involving 52 individuals were actually conducted. The primary purpose of the interview discussion was to inform people about the proposed project and campaign, to assess their awareness and acceptance of it as well as their willingness to support it, and to record their feelings about how others might react and respond.

3. **Other Surveys.** After the individual interviews were held, an online survey was conducted inviting all other members to share their thoughts and opinions with us about your project and campaign. In all, 42 online responses, along with 4 manual surveys were received by the deadline date of April 1, 2018 and have been tabulated and included in our analysis and report.

5. **Data Compilation, Analysis and Report Preparation.** During this phase of the study, all of the information gathered was compiled and analyzed, and a written report of the study results and our recommendations was prepared.

6. **Presentation of the Report.** The final phase of the study process involves presenting our findings and recommendations to the person(s) who authorized the study, answering any questions that might arise and deciding how to best proceed with a campaign effort that will ultimately meet your needs.

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.

SECTION B
SURVEY RESPONDENTS

INDIVIDUALS INTERVIEWED

Jose & Elizabeth Abad

Jim & Marilee Bellotti

Karl & Darci Berger

Powers Brian

Lon & Mary Ann Burford

Mike & Nancy Caselli

Hank & Patty Crowlie

Mitch & Rosemary DeGregorio

Mary Eichelkraut

Dennis & Mary Ellingson

John & Mariann Fisher

Donald & Corinne Fugina

Mary Graham

Nick Gutierrez

Ted Hamilton

Ken Harris

Noel Hesser

Eric & Ronda Hintz

Lynda Holbrook

Bonnie Hoschler

Schubert Joan

Barbara Monroe

Sue Olson

Teresa Partington

Bill & Helen Pierson

Richard Poletti

Raul Ramirez

Daniel & Kathy Salazar

Warren & Teresa Smith

Ron & Dinny Thomas

David & Moria Topp

Frank Vitulli

Bill & Theresa White

Mack & Lucy White

OTHER SURVEY RESPONDENTS

| | |
|-------------------------|----------------------|
| Jody Ambalong | Michael Hebda |
| Judith Anshin | Michael Holbrook |
| David Borges | Greg Hood |
| Elda Borges | Robert Jarzen |
| Betty Brown | Jean Lahey |
| James Brown | Gayle Lake |
| Robert Brushia | Elena McFadden |
| Charles Chenu | Elizabeth Miura |
| Henry Crowle | Patricia Morehead |
| Bill Cusick | Artanya Norman-Yusuf |
| James DeShon | Greg Nyland |
| Victoria Diepenbrock | A. S. |
| Frank Farnner | Johnna Sarkis |
| Todd & Jennifer Ferrara | Julie Sly |
| Heather Gordon | Gay Teale |
| Jane Graham | Elizabeth Testa |
| John Hardin | Michael Testa |
| K. Haroldson | Margaret Vibandor |
| Marolyn Harris | Gail Zimmerman |

SECTION C
SUMMARY OF ALL RESPONSES

SUMMARY OF ALL RESPONSES

In all, 94 survey responses were received. A total of 34 individual interviews were conducted, involving 52 individuals. In addition, 42 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 Holy Spirit Parish and the programs and services the church provides?

| | <u>No.</u> | <u>Percent</u> |
|-----------------------|------------|----------------|
| Very Satisfied | 66 | 50% |
| Satisfied | 51 | 39% |
| Somewhat Dissatisfied | 14 | 11% |
| Dissatisfied | 0 | 0% |

2. How well informed would you say that you've been about the church's needs and plans to build a parish activity center and a school STEM building?

| | <u>No.</u> | <u>Percent</u> |
|------------------------|------------|----------------|
| Well Informed | 44 | 31% |
| Have General Knowledge | 63 | 45% |
| Know Very Little | 26 | 19% |
| Uninformed | 7 | 5% |

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

| | <u>No.</u> | <u>Percent</u> |
|----------------|------------|----------------|
| Very Important | 65 | 51% |
| Important | 33 | 26% |
| Nice to Do | 24 | 19% |
| Not Needed | 6 | 5% |

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. Parish Activity Center with a parish hall, catering kitchen and administrative offices. | 33 / 35% | 17 / 18% | 32 / 34% | 12 / 13% |
| 2. School STEM Building with a science lab, math classroom and development office. | 60 / 67% | 19 / 21% | 8 / 9% | 3 / 3% |

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

| | <u>No.</u> | <u>Percent</u> |
|-----|------------|----------------|
| Yes | 98 | 77% |
| No | 30 | 23% |

-
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 | 17 | 12% |
| Good | 60 | 43% |
| Fair | 43 | 31% |
| Poor | 20 | 14% |

7. The cost of the project is estimated to be in the \$3,000,000 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> |
|-------------------------|------------|----------------|
| \$3,000,000 or More | 41 | 40% |
| \$2,500,000 - 2,999,999 | 6 | 6% |
| \$2,000,000 - 2,499,999 | 6 | 6% |
| \$1,500,000 - 1,999,999 | 12 | 12% |
| \$1,000,000 - 1,499,999 | 20 | 19% |
| Less than \$1,000,000 | 18 | 17% |

-
8. In your opinion, who would be the best people to lead a fundraising campaign for Holy Spirit Parish if we could get them?
-

(Names provided under separate cover.)

-
9. In your opinion, who are the members who might be capable of making the largest gifts if they were so inclined?
-

(Names provided under separate cover.)

-
10. In your opinion, what individuals and institutions outside of the church community (e.g., former members, businesses and organizations, etc.) might have the potential and willingness to make significant gifts?
-

(Names provided under separate cover.)

11. If a campaign is conducted, do you think you might consider or accept a campaign leadership position if asked?

| | <u>No.</u> | <u>Percent</u> |
|-------|------------|----------------|
| Yes | 8 | 6% |
| Maybe | 20 | 15% |
| No | 102 | 78% |

12. If not a leadership position, would you work on the campaign in some other capacity?

| | <u>No.</u> | <u>Percent</u> |
|-------|------------|----------------|
| Yes | 21 | 20% |
| Maybe | 41 | 39% |
| No | 44 | 42% |

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

| | <u>No.</u> | <u>Percent</u> |
|-------|------------|----------------|
| Yes | 69 | 61% |
| Maybe | 31 | 27% |
| No | 14 | 12% |

14. If you were to make a gift, what range gift do you think you might consider over a three-year time period?

Of the 100 individuals or couples who said they would make or would consider making gifts, 54 mentioned specific amounts or a gift range they might consider. The highest gift or range gift that any one individual, couple or institution said they would make or consider was in the \$60,000 range. 2 individuals or couples said they would make or consider such a gift. The total of specified gifts that people said they would or might consider ranged from a low total of \$448,050 to a high total of \$614,600.

15. Are you aware of any other campaigns that are in progress or being planned that might conflict with a campaign for Holy Spirit Parish?

| | <u>No.</u> | <u>Percent</u> |
|-----|------------|----------------|
| Yes | 36 | 33% |
| No | 73 | 67% |

Potential conflicts mentioned more than once included planned, actual or potential campaigns for the Diocese of Sacramento and Christian Brothers High School.

16. Do you have any other comments or suggestions that you think might be important or helpful to this study or in planning a campaign?

CHURCH SATISFACTION

1. I am excited about the school.
2. Fr. Michael has done a good job. I have been a parishioner since the doors opened. Our parish is only going to be as good as the young people that will take over.
3. We are lacking the social events at our parish because of the lack of a gathering space. Perhaps we could rent the new gathering space for income. Our parish is a community and there is a disconnect when we have to get in the car after service and travel to the school for parish events. My former parish built a community center and it really connected the parish with the community at large.

4. I love this parish.
5. I am incredibly satisfied with the school; the state of the school is positive. I am very pleased. Not as enthusiastic about the parish project. The timing on the increase in tuition was around the same time as the school auction which wasn't good timing.
6. We are extremely satisfied.
7. Our children have graduated from Holy Spirit, now our attention turns to the church. Fr. Michael is encouraging people to volunteer. He has been doing a great creating new ministries. He is making a great effort to connect parish and school.
8. I have always been very satisfied for 40+ years.
9. The church fulfills what I need.
10. I can see, however, in order to grow as a parish, we need to upgrade and provide more space to carryout study and social activities.
11. We joined Holy Spirit because it offered many interesting programs for faith development such as the Little Rock Scripture Program. Today's offerings are rather simplistic and seems directed to recent converts.
12. We would like the return of the Sunday 8 o'clock mass.
13. I would prefer that the health hazards (e.g. lead exposure) that affect HS staff be addressed immediately. This should be at the top of the agenda, before anything else. The plan is very ambitious, and it will be time-consuming both before and after the money is raised. Those health risks present during that time are not acceptable. I would prefer to have a more expensive plan that addresses the health risks immediately than a plan that will leave them exposed at least a few more years.
14. I am concerned somewhat about the proliferation of new programs and the appearance of a lack of coordination with existing programs and ministries.
15. I agree it would be nice to have easily accessible activities for busy families with young children to participate in but I understand this is limited by the current space limitations. I love the pastor's dinners with new families' idea, I hope we get invited as we would love to be more connected with the Holy Spirit Church community, we've been limited in attendance by naps and the challenges of two young children but we come as much as we can.
16. We need more communication, decisions appear to be made without input. This survey should have been conducted well before the proposal was put together so that its feasibility could have been properly assessed.
17. So much more can be accomplished with a new Parish Center.

18. I like the school and the people. I've been frustrated with a lack of communication and the feeling that our value to the parish is predicated on how much money we give and nothing else. I believe that a global approach to what people give to the school, over and above cash, is an important factor when valuing true contribution.
19. I feel that the parish does not provide very many social opportunities for single adults that are not senior citizens, and too much emphasis is placed on the social needs of pre-teens and teenagers.
20. There are more programs than I can find time in which to participate.

PROJECT AWARENESS AND ACCEPTANCE

21. Will the new parish activity center house the CFF program? This is one of the more important programs of the parish. The accommodations for this program is very important.
22. There have been some financial decisions made 3-5 years ago that I did not agree with.
23. I was informed through the communication as a member of one of the support groups of the parish.
24. I attended the town hall meetings, this project sounds like a good idea.
25. I have general knowledge about the school and would say I am uninformed about the church. I am informed about the school because of my involvement.
26. I did not know about the parish activity center until recently. I did not know about the duplex purchase several years ago.
27. I have just become aware of the church's and school's needs.
28. I have recently been informed over the last two months. I am excited about the STEM program. The staff at school are wonderful. There are other updates to the school that need to be addressed such as electrical, plumbing and the bathrooms. Perhaps the convent could be used better, it is a beautiful building.
29. The parish activity center is way overdue.
30. We have had no communication on how the parish activity center came about. We are more informed about the STEM building as we are grandparents of students at the school.
31. We are well informed with the school project. The parish could have laid out the plans for the activity center a little better. We know very little on the parish activity center other than what was stated in the preliminary case statement.
32. We know the plans were laid out before they were presented to the parish.

33. We heard of the needs and plans through the town hall meetings.
34. The rectory is not being used. We are informed because we choose to be involved.
35. We knew about the STEM building, but were just recently informed about the parish activity center.
36. We are more informed on the STEM building. Our leadership is doing a good job of getting the message out.
37. We attended the town hall meetings and were informed of the projects.
38. I was recently informed about the parish activity center.
39. I don't understand why both projects are included in the appeal.
40. We would like to see how we can better utilize the convent space.
41. Our parish is viable, we have young people coming in and we need to provide for them. My kids are successful because of our Catholic School.
42. We need more information on the STEM building. Families, especially prospective families, need to see the technology updates.
43. For those that participate, it is important to have adequate facilities. STEM is very important to the school but not important to me, but this is a package deal. I feel these projects are important to staff members who work there.
44. At first the senior parishioners did not want change. We have to keep up with the times. I have been doing volunteer maintenance work and I know there is a need to improve. The STEM building is needed today to enter into a secondary private school for engineering.
45. It will be so nice to walk across the parking lot to attend a gathering after a funeral.
46. We are disappointed they (the school & church projects) are together. Which one is the most important?
47. We have done receptions for 100 people in the current gathering space. A room of 200 is not large enough. We understand it would be nice to have something close.
48. I am concerned about the two projects being sold together, I think they should not. Parish activity center is long overdue, our priests deserve better. However, if we tie the school into the case, it will be problematic.
49. It is not possible to package both projects in one case. The church project drags down the school project.

50. We especially think the parish activity center is very important. For us that have been here 50+ years it will be hard to see the rectory go, but it a useless building.
51. I am disappointed in the thought of a new parish activity center. We can continue to use the school facilities. Fundraising will be a challenge. I am curious what the neighborhood will say.
52. The STEM Center is critical. We are torn on the parish activity center, it feels more like a luxury than a need.
53. We are not in favor of knocking down the rectory, not convinced about that. We do recognize the need for the parish activity center however.
54. I have a problem with including the school and the parish together. I am not sure, but I think the older parishioners may not care about the school's business.
55. I think there is a way to utilize the rectory. We were pleased to read the bricks were going to be salvaged. We don't understand the purchase of the duplex several years ago. Could we sell the duplex and use the funds to renovate the rectory?
56. My feeling is the church is the people...after reading the preliminary case statement I am more aware of the improvements that are needed, for sure. We are in total support of the school STEM building.
57. What possible technology can they teach in K-8 that would be essential to their continuation into secondary school? We are not close to the school so we will have to deter to someone else's judgement. The parish hall needs a screen (hidden when not in use) that can be used for group presentations. Is there a way to salvage the roof tiles?
58. It's a dream to get both done for \$3 million. There remains a lot of repair and maintenance at the school to be done. Is any money going to maintenance? Bathrooms are designed from the 50's. We need to step it up at the school to maintain quality of education.
59. We don't have the space at our parish to have functions such as receptions and youth activities.
60. We don't have a gathering space at the parish, it would be very nice.
61. We need the expansion to offer students an education so they can continue to be accepted to high schools and colleges to further their education.
62. I like the idea of a parish activity center because of my previous involvement as a volunteer for one of our ministries.
63. I am opposed to the parish activity center as it is not the proper place. Previous pastors put money into the rectory, and I would hate to see it torn down. From my perspective as a 55+ years member, put the sisters in the rectory and renovate the convent to become the parish activity center then everything is in one site.

64. We don't know what the science department is doing at the school. If we do have the ability to build the parish activity center, will we still be able to use the school? Are the endowment earnings going to be used to help fund the school project?
65. Our granddaughter went to school there, they need space and better facilities.
66. Science is extremely important.
67. The STEM building is needed now, as you read the paper each day it is amazing what is being done in science and technology. The parish activity center and STEM building are different projects. The school families come from around the city not just from our church. We are concerned about the STEM building getting lost with the parish activity center. The STEM building needs to happen now, the parish activity center can come over time.
68. The parish activity center is very important because we need more space.
69. The current facility (parish offices/old rectory) is in need. The new parish activity center would make our church more community minded. It is always easier to attend an activity by walking across the parking lot than having to drive somewhere. It is important to keep the school competitive. We wish they would update the bathrooms in the school.
70. When we first thought of the rectory coming down we were not in favor, but then when we thought about it and were made aware of the needs and plans we understand and we are all for it now.
71. The STEM building would be nice to have for the students that excel in Math, but we have students that also excel in fine arts.
72. The current facilities are too small to take care of the parish. Our school needs to be updated and the trailers need to be replaced.
73. There is very little transparency, there should have been scheduled meetings for all parishioners to participate with the times announced in the bulletin. It appears that decision have already been made.
74. In the beginning, anything I heard was by way of rumor. The meetings held to explain the project would have better served to build enthusiasm if they were held early on.
75. This project is important for the school. Why is there a need for a catering kitchen? I support interior remodeling. Many homes in this old area have installed ramps with railings for elderly.
76. Upgrade is required for all facilities, it is ongoing. Expansion is required for growth of our parish.
77. I would like to preserve the historic priest's residence as is and remodel within, extending it out the back if needed.

78. I am completely against tearing down the rectory. It is a fixture of the church and community. It should be redone/redesigned to house the priests and offer a meeting space. It is plenty big enough and would be a tragedy to tear down, it is a beautiful brick building in the heart of Land Park.
79. I appreciate being able to read over all these detailed plans online and now have greater knowledge of the overall plan. Also, I can see how much time, effort and study have already brought the plan to this point and am impressed with all the planning and visioning that has been done by parishioners and staff already. It is well-thought out and thorough.
80. Actually, the past and present parish leadership group has done a terrible job informing the parish at large of the anticipated needs and there has been no discussion of reutilization of the almost empty convent.
81. By the time I heard, it was decided.
82. Town Hall meeting was the only formal source of information and that was limited in that many questions were not addressed or answered. No other informational meetings have been held since.
83. This proposal creates a clear vision of the needs of the church, some of which I was not aware. The needs to improve STEM have been discussed for almost a decade. I appreciate the school continuing the conversation and trying to follow thru.
84. When Father explained it to us, I understood the value. Prior to that conversation, I didn't think it was necessary at all.
85. Space dedicated to only development is not important. A small office and a general meeting space for meetings, staff meetings, private parent meetings etc. would be very valuable. It is very unclear how much development work is actually generated out of the school. Parents seem to be doing all the work, with the Annual Fund seeming to be the exception. Would parent volunteers leading fundraising efforts have access to this space too?
86. Holy Spirit Parish is asking a huge commitment from its parishioners. It is imperative that everyone has a chance to know what is happening and be able to ask questions in an open way.
87. The needs should have been separately assessed, i.e., was a feasibility study done to consider the use of the convent for the STEM building? If the convent were remodeled to house the STEM building, disruption to the campus from construction would be held to a minimum. Also, repair, maintenance and infrastructure improvements to the campus are a priority item compared to the proposed remodel to the rectory. It is a pipe dream to realistically consider that both projects could be done for \$3M (maybe the STEM building alone).
88. Many of the issues can be addressed in the present building for a lot less money.

89. I think the school project should proceed, but there has been no information regarding having academically qualified instructors, an art major is usually not a qualified or successful science instructor.
90. I am not familiar with the school needs, so can't comment on that. The parish center is needed to keep up with the present times and to be a welcoming place in the neighborhood. What is there now does not outreach or promote awareness to the neighborhood. The building at present does not have a welcoming feeling for a neighborhood which has hundreds of walkers pass by each day and also a neighborhood which is close-knit and full of people who are active in the community otherwise.
91. We should fix the rectory to make it work within the confines of what is needed for the church.
92. I think it is most important to have the health risks assessed and managed in an urgent fashion.
93. I have mixed feeling about a new STEM building. I am a science person and have a deep appreciation for STEM education. However, I question whether all options were exhausted before determining a new wing should be added to the school. The convent sits virtually empty and underutilized. It is an existing structure much larger than the proposed new building. Could that building be modernized at less cost for science, math, art, music, and other uses? Could it house the school's administrative offices to open existing office space in the main school building for additional classrooms? Homes in Land Park much older than the convent have been completely gutted and upgraded without having to demolish and start from scratch and I challenge us to explore all options and have an open dialogue about them.
94. Better facilities are good but the school is too small for a true STEM program.
95. The convent could be re-utilized as an activity center. It seems that buying the duplex is the driving force to change the physical layout of the current church complex.
96. I am opposed to the plans for the rectory due to cost, loss of residence for the pastor and any other priests, and what I see as lack of need for such a large center when we have school facilities that work. As for the STEM project, it is a great program but I think we need to institute the program in the upper grades using the existing facilities and then see how to expand it as funds allow.
97. We were aware of the school project when it was announced at the school.
98. Repair, maintenance and infrastructure improvements need to be taken care of first.
99. Although I'm saying the STEM building at the school is very important, I really don't have specific information about school enrollment, whether tuition would be increased because of it and other factors that may affect its use once built. Based on what I've heard, however, others say it's in the very important category.

100. I don't believe the parish should go into debt with the current economy. The construction should be like the Mormons who have all funds in hand before starting construction.
101. I think it is a good thing. We need the parish activity center and the school needs to keep up to date in the STEM matters.
102. This old rectory was just not made for offices and a parish center.
103. Repair, maintenance and infrastructure improvements need to be taken care of first.
104. I think a good program in math and sciences is a good thing. I do not know enough about current expectations or how our school compares to give assent to the proposed plans.
105. The safety and health concern in the Rectory is of great concern for employees. This survey was the first I knew of these dangers. I also now understand that the entire structure will be removed and rebuilt, clearly a great expense.
106. I was aware of the STEM building but not the parish activity center.
107. I was just recently informed about the parish activity center.
108. I recently became aware of the parish activity center. We knew about the school project before.
109. I am not sure all the parishioners are aware of the projects. We need to spread the word.
110. I know some that are not for the activity center but they may not be educated about the needs and plans. The more information out there would be good.

CAMPAIGN AWARENESS AND ACCEPTANCE

111. We did not know about the thought of a campaign until recently. Is there reserve to use for the projects?
112. We were assuming a campaign was coming.
113. We were informed about the campaign just recently.
114. We assume a campaign was in the plan after we heard of the projects.
115. I was aware of the project and assumed the campaign would follow.
116. I was informed of the fund-raising campaign only recently.
117. We were informed at the information meetings.

118. We have been successful in raising funds previously. People that have been here awhile may be confused about idea of dismantling the rectory as previous pastors did put money into the rectory. Where our pastor is living now is just a place to sleep with no room for guests, so we need to keep that in mind as well.
119. There are some that will support the school and some that will support the parish project. It is difficult to rate the acceptance level because one is for the school and the other is for the church.
120. There is a concern among the school families about the minimum \$25/week parish contribution to the parish to receive the parish tuition rate. This may have a negative effect on participation of the school families.
121. If you can restrict your gift to one or the other (school or parish) the case with both projects will work.
122. I would say fair based on the current philanthropic understanding of the community and that our parish has not done anything this large before. There are members speaking out against the parish activity center, they generally are the older members thinking why wasn't the rectory good enough for the pastor?
123. The elderly may not wish to support the school and school families may only wish to support the school. Our pastor is making a good effort to connect the two segments.
124. The acceptance level will be poor if the two projects are together. The school project will be excellent by itself.
125. At this point in time about half would support the projects. Some are very supportive of the school project, some are skeptical about the parish activity center.
126. The acceptance level will be good if we can show the need. It will be difficult as we have a lot of young families.
127. If you separate the two projects out, the acceptance level for the school will be excellent. I support the STEM building but not the parish activity center. Not sure families would want a wedding reception in the new parish hall. I am curious as to what is happening to the funds in the school foundation.
128. The acceptance level of a campaign is difficult to determine. Some say we don't need the new parish center but I hope it will be accepted.
129. I think the acceptance level will be good for the school project, fair for the church project and poor if we include both. The church presence on the school campus needs to increase.
130. The acceptance level depends on the approach and communication to promote the two projects. It is important to state how you are being good stewards in the design. The design of the new center needs to fit into the neighborhood. Neighbors would like us to keep the design.

131. Older parishioners may be against the projects because the fear of change. Young parishioners tend to be for the projects for it is an opportunity to make a better place, modernize our church and create a gathering space. We have to communicate better and be sure we are spending our money wisely. The school not being attached to the parish campus creates a divide. People want a gathering space at their home (parish), non-school families may not think of the school as their home. We have a sense of community at the church and we need to keep that and enhance that with a gathering space at our church.
132. Young people are tapped out because of the tuition requirement. We could not rent the center for cash.
133. Families at the school will say their funds are going to pay tuition and to support their children's activities, so may not have available funds to give to the campaign.
134. The acceptance level would be high for the younger families, some older folks are asking why can't we keep the rectory and may be hesitant to provide support.
135. Some school parents are more supportive of the school project. Some parents with tuition responsibilities will have a hard time with a pledge to the capital campaign.
136. Our church is not used to fundraising to this magnitude. We have been blessed (pampered) and have not had to put forth an organized fund-raising campaign in previous years. We are not used to a capital campaign effort.
137. The senior members of the church are not favorable to the projects. It will be difficult to sell both the school and the parish. Bathrooms at the school need attention. There was just an increase in tuition, parents are concerned about that and the campaign going on at the same time. Senior ladies of the parish do not seem to be in favor. It will be great to have the Parish Activity Center but don't think the parish will support it. I don't think the \$1.5 Million will meet the STEM building cost. I don't believe we can do both for \$3 Million.
138. The acceptance level of the members would depend on how the case is structured. Parents of the school will find more acceptance of the STEM building. We need more information of where the dollars raised will go, is it a 50-50 split, i.e., school and church? Then what is the timing of the two projects. Is one more urgent than the other?
139. The acceptance level would be above average as there is money here. There is a concern about burnout with so many appeals. Sell the projects correctly and the results will be above average.
140. The economy is not the greatest yet. Participation for members in mixed marriages is difficult. The acceptance level for the older parishioners will be poor.
141. I didn't have any detail but I understood there would be a capital campaign.
142. Again, good to read all the details here as it makes the case as to why the new facilities are needed.

143. One of the major pieces of information missing from the discussion is specific information about parish finances and whether the entire \$3M needs to be raised; whether there's less needed; and most importantly, what about ongoing maintenance and operation costs. I haven't seen or heard any of these figures and the parish finance report given at Mass doesn't give specifics to know the answers. For the STEM building, how does the school budget fit into the building and its operation? That should be explained in detail as well.
144. I found out at Mass, that folks contacted the bishop regarding this issue. The parish leadership has demonstrated little or no respect for the folks paying the bills and now want more funds for administration duties.
145. There has been very little mention of this other than a couple of signs posted.
146. Just as the duplex purchase was a complete surprise until after it was a completed transaction, this project was not discussed in public until several people complained about "rumors."
147. This should have been made known concurrent with the conceptualization and prioritization of the projects in conjunction with campus repair, maintenance and infrastructure improvements.
148. I was never informed of such but expected it.
149. I only became aware of the full capital campaign by word of mouth from another parent. And then, in a subsequent conversation with Fr. Hebda.
150. Employing a fundraising campaign is expected, although I was unaware of the financial target. \$3 million seems low for this undertaking. Have we paid off the cost of church remodel done several years ago?
151. Most of the people I know do not like the idea.
152. It is important in my view to have much more specific financial information available then given to parishioners in support of this project and the ongoing operational costs of such a facility. For example, nothing has been said about furnishing the new parish center, hiring staff for its operation, etc. I think the same information needs to be done for the STEM building.
153. Education on why these projects are important and the value they offer is paramount.
154. Most people I know do not want the project, especially the redo of the old rectory.
155. You have to have a strong community before you can ask your community to invest in physical structures. There's a disconnect between the church and the school that needs to be mended before each will willingly support the other, in my opinion. Unfortunately, I'm not sure a \$3M campaign would be successful in the current parish community.

156. I have a stereotype of the membership from Land Park being able to meet a three-year goal. If more of the members were from my area southeast of Freeport and Fruitridge then I think the timeline would need to be extended to six years, but we would still try to do our best!!
157. I do not believe that a convincing argument has been made for the rectory replacement. The school project is worth doing but I am bothered that there has been no discussion of convent reutilization to reduce cost and maximize facility utilization.
158. This is a very expensive campaign and the two projects are being packaged. Unless we have major commitment from parishioners to contribute, we will be stuck in the middle of the project with no way to finish it or pay for it. We must be more careful.
159. The idea will be well received but not all parishioners will be able to make large donations.
160. I worked on a Diocesan financial campaign several years ago. I solicited contributions from Holy Spirit parishioners. There was substantial generosity coupled with some reluctance and a few that resented the whole idea based upon what they thought was past inadequate financial stewardship.
161. An assessment of fundraising priority assessment should have been made at the conception stage, not now.

VOLUNTEER AND VOLUNTEER LEADERSHIP POTENTIAL

162. Our leaders need to be someone young.
163. We need young energetic members to lead.
164. Campaign leadership from the school parents would be difficult because of the required time commitment. The campaign leaders would need to be paid.
165. This is difficult, I don't have the insight. We are thinking the only parishioners that have information on this is the Finance Council. The dissemination of the information on the program is a little late.
166. The parish council members would be good prospects.
167. My volunteering for the campaign will depend on how it is structured. We are a strong advocate of our school.
168. I might if I were to be paid.
169. We have been involved with so many fundraisers already.
170. I'd rather prioritize just making it to Mass, I miss Mass!

171. At 80+ years of age, I just don't have the mental or physical capacities to do all the things I would like to do, or would have at least tried to do 10 years ago.
172. I work full time, plus also taking care of an elderly friend in my home at the present time and her needs at age 88 are increasingly taking some of my time as she has no relatives living in the area.
173. I would not volunteer because I do not believe the project is necessary.
174. My health limits my ability to make firm, continuing commitments.
175. My work will cause a conflict and I'd not be able to assume that role.
176. I would not be an asset to the campaign fundraising project because I am essentially opposed to it. I understand the need to update wiring and enhance curriculum, but I believe those things can be done with a much smaller budget and scope. Families are still going to send their children to Holy Spirit School even if there is not a new science building and parishioners are going to continue to worship at Holy Spirit Church even if we don't have a 200-seat hall.
177. Obviously, I'm an idea guy, feel free to call for brainstorms, I went to private schools so I've been on the receiving end of lots of campaigns. I'm also into branding and marketing just as a hobby.
178. We already take a leadership role in fundraising for HSPS operating fund programs/ activities and have no additional capacity.
179. I don't support the project, so I won't volunteer.
180. I cannot work for a project I cannot support.

FINANCIAL POTENTIAL

181. We can raise \$3 million but it is going to be challenging. We have the capacity to do \$3-\$5 million. We have parishioners that have been blessed.
182. We can raise the \$3 million with the right leadership, good communication and team work. We cannot be a dictatorship and presentations need to be clear.
183. We believe the school project will be easier than the parish activity center.
184. I think we have to keep the two projects separate in the campaign. We need fine arts to be included in the plans, we need to encompass all students. Maybe we need a STEAM building to include fine arts. It seems it would be confusing to include both projects in the appeal.
185. The STEM project would receive support from the school parents.

186. We will be able to raise the money for the school, but will be difficult to raise the funds for the parish center. We are wondering if there are naming opportunities available for both buildings. Someone may step up and give the full cost of the buildings for the naming rights.
187. There are out-of-parish students attending our school, is it the parish's responsibility for their cost? Are we going to ask for bids? Have we exhausted all options to renovate the rectory?
188. It has been a long time since we have been asked to give to a campaign in our parish. Can the city buy the land we own by the school and then use that to help fund the parish and school needs?
189. I am hopeful we can raise the full amount.
190. The convent at the school could be evaluated and may be used better by the school. I would love to see a feasibility study on how we can better use the convent.
191. Less than \$500,000 at the status quo. Communication has to improve, the connection of school to parish is low right now.
192. Schools are a great sell. The parish activity center is needed. We can raise it all if things were spelled out clearly. Holy Spirit has been generous. Parishioners are knowledgeable, but need more information.
193. Conservatively we could raise about \$1 million, some of the elders are dying off and the millennials are raising children and have bills to pay.
194. I would donate to the school project.
195. I will support the school for sure, but not sure about the parish activity center. There may be potential with the convent at the school.
196. Our gift will depend on if it is for the package, or if we could choose school or parish.
197. People are concerned about \$1.5 million covering the demolition, building permit and the rebuild. Bids need to be accurate. I am hoping the young people get excited about the building and then inspire the senior members.
198. Again, our gift will depend on how the campaign is structured and how will the funds be divided between the school and church.
199. We will support the school only at this time.
200. They should separate the projects because some parishioners might be more willing to donate to the school project.

201. It depends on whether my stereotype is accurate. You're basically asking every family to donate \$1000 a year extra per year for three years. My family could probably do closer to \$300 per year for 6 years. You may want to consider separating the campaign. Because you're asking for an honest feasibility assessment I would likely sacrifice more for the parish but not for the school, sorry, just trying to be truthful. Also, if you separate the campaigns you may have success in alumni fundraising that may include folks who really loved their education, teachers and experience but may no longer consider themselves Catholic or want to support the parish hall campaign. Remember in an alumni campaign you want to encourage competition between classes for percentage of participation not big gifts, try to get everyone who has ever gone there to pledge \$10 a month for the next three years just for the science lab. This is one example of why separating the campaigns may be useful.
202. I am not aware of any effort to engage with the parish community regarding this entire project until the need to address funding.
203. I have nothing to base this on, other than we live in a generally high-income neighborhood/parish boundary. Most people in Land Park proper have high incomes or are retired (not sure what retired persons' incomes are).
204. If there are 1,400 households, then over three years it would mean about \$55 per month per household. Some may give more, some less. But I believe it's achievable.
205. My answer here is a guess, but from people I have discussed this with, I am not hearing an enthusiastic response to being asked to fund such a huge and expensive project. I think we seriously need to consider one project, not both.
206. The marketing of this campaign needs to be clarified. Will it be a package? Can you earmark your money for church or school? Are there matching funds from the Diocese? These are rumors that need clarification.
207. I understand that the parish has no other significant debt. If true, can a portion be raised and a portion financed?
208. \$300/yr. for 6 yrs. if the campaigns are separated. I think I'd make the sacrifice to go to \$500/yr. for 6 yrs., again I'm just trying to give you as much honest information as possible, my stereotype of the school is that the kids are already receiving a very privileged education. I'd be more compelled to give the \$200 difference to St. Patrick's services complex or something like that.
209. I, like many parishioners at Holy Spirit, am not wealthy. I already give as generously as I can, both monetarily and with my time. In addition, I support other charities in our community.
210. Since the structure of the campaign is unknown, it is difficult to say. Conceptually, school repair, maintenance, infrastructure and the STEM are items to which I would contribute. The STEM project as it is presently proposed, no.

211. My gift would be determined after obtaining much more current and specific financial information as I mentioned in answer to earlier questions.
212. I would need to know that the health concerns were a first priority. I think that maybe these should be two separate initiatives the more that I think about it.
213. I am still waiting for a credible argument for the program.
214. We already contribute to the parish, the school annual fund, and monthly to CB, so an additional contribution would be difficult, but we could commit on the order of \$3000 or so over three years.
215. I can't make a commitment until the project is properly structured.

OTHER

216. Is the STEM building attached or free standing?
217. Keep in mind the need to campaign for those neighbors that may just be waiting to be invited to join the church.
218. Don't forget to have a theme for the campaign.
219. The change in leadership in the school and parish creates a gap in the transfer of knowledge of who the large benefactors are and that lacking transfer of awareness causes some frustration in various communications regarding parishioner status for example.
220. Communication about the project is key.
221. There is a grand opportunity to seek gifts in-kind from the contractors.
222. In five years what happens when our pastor leaves or retires? Will the ministries he created/creates continue?
223. We need a concerted effort to get a good team of young people to lead those parents of grade 3 and below as they are the future benefactors of these projects.
224. The attention should be directed to the STEM building.
225. Some parishioners are not informed about the finances of the parish and are concerned about a committee making all the decisions.
226. We need clarification on where the school's annual appeal monies will be directed. Is it still going to be directed to the STEM building?
227. The parish activity center is needed as well as the STEM building.

228. If need be, do one project at a time.
229. Renderings are needed to sell the project.
230. Donor recognition does not have to be a big push.
231. People appreciate the parish and will step up.
232. There should be more emphasis on the school as it is necessary.
233. We need to keep the momentum going.
234. Asking for money has been so aggressive and often, I am concerned about donor fatigue.
235. Support for kids will sell. We are interested in perpetuating our heritage.
236. Keep the façade the same, keep the front integrity of the building.
237. Some feel the convent should be converted into a parish activity center.
238. The rectory has served its purpose.
239. We will have a reception/gathering space in which to be proud, rather than to have to get into your car and drive to the gathering space.
240. It is good to keep the brick work to maintain the integrity of the property.
241. I would be interested to know if any of the religious have an estate to extend to us.
242. There are positive benefits of the two projects.
243. There are Land Park families that are proud of their neighborhood and are concerned if the new center will be an eye sore.
244. There is a great need for a parish gathering space.
245. What is the capacity of the school, how many more students can be accepted?
246. Our current gathering space is too small.
247. Make the acoustics bearable for the hearing impaired.
248. We don't know if wedding or funeral reception space is in high demand.
249. Do we need a better kitchen?
250. The rectory has inadequate bathrooms, our sympathy for the old maintenance issues.

251. Our school principal is interested in an engineering program called, "Lead the Way." This would be great.
252. We believe in education and are in favor of developing the school.
253. Lay down a good story and repeat it.
254. We have room at the school for a parish center.
255. Be sure to include renderings of the new buildings to sell the project.
256. The neighbors need to be assured their property value will be preserved.
257. We need to research other parishes that have a gathering space as to what they charge to rent their parish hall.
258. \$3 Million may not be enough just for the STEM.
259. We need a minimum of four contractors to give us a feasibility study on what is the best plan for the use of the rectory and convent.
260. Will the parish contribute individually to the school project?
261. I need clarification, if I am contributing to the school am I also considered contributing to the parish?
262. Transparency is good, just tell the story.
263. Emphasize this is not only the pastor's plan it is the church's and school's plan. This is benefiting everyone.
264. Town hall meetings were positive. People that are negative right now may not have all the facts.
265. It is more important to justify the needs, rather than "can be used for."
266. Debt, over a period of time, may work with the long-term commitments.
267. Is it a needs problem vs. a scheduling problem?
268. Be a good steward when planning these projects.
269. If an associate pastor comes where will he stay?
270. Can the convent be used for the scholastic use at the school?
271. We loved the rectory, it impressed us as we grew up. It will be hard to let it go, however, we can't let it go unused.

272. Both projects are good. They need to be marketed correctly, be clear on the projects.
273. We think the need for the parish activity center needs to be explained better. Right now, there is some resistance. Some people still would like to see it as a residence. Some questioned the pastor moving to the duplex several years ago. The parish activity center is not a bad idea but the need for it is not clear, sell the need. We have given in the past through time, talent and treasure.
274. We need to know realistically as to how the funds are going to be distributed, i.e., school project or parish project.
275. There are a lot of people that do not want the rectory torn down. We are not against it, however.
276. The town hall meetings were not marketed correctly and it presented a sense that the plans are a done deal without any input.
277. People in the parish want the opportunity for input on major projects like this.
278. The current 8th grade classroom does not have a bathroom so it could not be used for a TK classroom.
279. STEM is essential for the future of our school and our children.
280. How many people will be using the center on a weekly basis?
281. Perhaps we could rent the space.
282. The purchase of the duplex was done without due diligence of research of the rectory uses and was not transparent.
283. We would love to participate, we would love to help.
284. We are concerned the STEM project will be lost in the case.
285. Donor recognition would be a great strategy to motivate new donors.
286. How will storage be distributed in the school building with the elimination of the two portable trailers?
287. There would be an interest in having wedding receptions at the new center.
288. Keep everyone informed, communication with the congregation is key. Let everyone know about the project.
289. I understand the rectory is old and needs attention.
290. I wish there was a way to preserve the rectory, but I know we need to progress.

291. If you can restrict your gift to one project or the other the case statement will work.
292. I am hoping we can salvage as many bricks as possible.
293. Holding special events for the campaign will help.
294. The telephone and Wi-Fi issues can be fixed immediately.
295. I don't think the parish has been informed about what the real benefits of remodeling the parish center/rectory will be. All discussion has been very general in nature. There have been a lot of rumors but not much organized information given or formal discussion or presentation. At the town hall meeting I attended, the only reason given for remodeling the rectory was to have big dinners and stuff like that.
296. What will it cost to operate this expansion and how will it be covered?
297. I am very disappointed there wasn't more discussion/explanation. This survey should have been distributed at mass as the bulletin is.
298. The Bishop had a \$50 million campaign a couple years ago. Holy Spirit purchased a duplex in a costly area, parishioners were told after the fact.
299. If the former rectory were to be modernized why not keep the brick exterior and just gut the interior for the changes that are needed. Land Park residents will be very unhappy with a building that does not fit the neighborhood.
300. There should be means to make separate donations for the two projects. People may want to donate to one and not the other.
301. Thank you so much for this information and conducting the survey. I hope it will be helpful.
302. The School STEM project would help insure that Holy Spirit School will continue to be a leader in Catholic education.
303. I think it is a bit late to expect to build support for a major building campaign when the plan was developed without broad discussion and input, very disappointing.
304. I need better information, such as a general meeting, information has not been forthcoming in this matter. There must be a better way than tearing down the existing rectory.
305. I would have some suggestions or questions regarding the Activity Center.
306. As useful as a new science building would be, where will you find qualified staff to run such an ambitious STEM program? Would there be an endowment to assist with the cost of attracting such teachers?

307. Overall, I believe that a parish needs to be kept informed as to the hopes and dreams of its leaders (both religious and lay). We are all important stakeholders in the operation of the parish. The primary concerns need to be our worship and elements of our faith life such as charitable works, etc. Because we have a parish school, we need to maintain it and make sure that the children are being educated properly and the staff is qualified and compensated appropriately. I fully understand the need to keep our properties safe and well-maintained. But I feel we have wandered too far from the "what do our parishioners need?" into an area of "what do some people want?" Maintenance and upgrades like the church office are needs. A fancy building for a Development Office or a 200-seat hall with a catering kitchen are "wants" that are beyond what many people want to pay for. I also think that getting rid of a residence for priests is a mistake. Thank you for accepting my input.
308. I think that the project is a great idea, but it might be easier to achieve if it was broken up into a series of smaller, attainable projects. I think that the parish itself is a resource that could offset the overall cost of this project. It might be advisable to ask the parish how they can contribute with their time and talent as well as with their money. There are probably professionals living in this area that can assist in ways that are more valuable than money. Just my opinion. Rebuilding on this level is very time-consuming and costly, which is why I think it should be done in realistic smaller steps using the available resources. This will feel more like something is getting done rather than an unending fundraiser. We had a funeral at Holy Spirit, so I understand the need for more space. I just think this is a very expensive plan.
309. The Parish has never had or asked for a capital campaign, this is a no brainer and needs to be done. It has my full support.
310. I am not a STEM advocate. California has a teacher shortage. Catholic schools don't have the funding to retain qualified STEM teachers. The parish & school need to stay focused on Catholic education, writing, reading and connecting young new families to church. STEM at high school levels is enough! We need well rounded children. I don't believe lack of STEM is what stops folks from attending HSPS. After 16 years and 3 children at HSPS I do not support spending money on STEM.
311. I have shared my questions and concerns in my comments throughout the survey. I learned of this survey only because I attended Mass last Sunday. When will the school be sent the survey to fill out? This has to happen to properly compile data and opinions from the school community. Perhaps this has happened and I missed it. Thank you for your time and efforts. This was well done.
312. Holy Spirit needs to decide what its message is and then put it on repeat in every possible way. Communication with parishioners and parents is sparse, incomplete and, frankly, largely by word of mouth. It seems like there is so little information that is openly shared. One survey, one announcement, one line on a website is not enough. You need to repeatedly send, ask, acknowledge and engage. We have been part of the Holy Spirit community for over a decade and have always enjoyed the strong neighborhood community. But the parish community -- church and school -- have always felt like two separate entities begrudgingly sharing the same banner. Improved cross-communication, engagement and shared

responsibilities between the school and church could go a long way towards building a community that would support building new buildings.

313. Being a good neighbor while construction goes on is vital. It should be a top priority. We can develop either friends or enemies that will last for decades. All steps should be taken to retain a design elevation maintaining the feel of the existing rectory as an architectural bulwark of the area. Design flights of fancy - I give you the Diocese of Los Angeles Our Lady of Angels Cathedral - should be strenuously avoided. Adequacy of parking per se as well as impact on the surrounding neighborhood is already being viewed with skepticism and should be addressed both in design and by an information campaign. Please forgive the comment but I think the pitch for this could be made stronger and more effective. People always want to know, "what's in it for me?" This may seem crass but human nature extends to the building of churches and schools as well. An average Sunday's attendance leads one to conclude that our parish demographic skews somewhat toward the right side of the age bell curve. It will be important to capture their imagination about the school improvements and their value to the parish. Many older parishioners no longer have connections to the school and/or believe that they have contributed enough in the past via tuition, fund raisers, etc. Targeting the feel of the new building is crucial. The church renovation sets a standard but is probably a bit too rich for other related facilities. The design should emphasize beauty and solidity. One should be able to imagine it lasting for a century respectably -but avoid anything that seems like extravagance or "The Church of What's Happening Now." This will test a good architect/designer. Good Luck!
314. I think tearing down the rectory will negatively impact the parish. Many parishioners will be devastated and will be so upset that they will be forced to find a new church. There isn't any reason the rectory can't be brought up to date and maintained for optimum use. Parish priests should use it as their residence, and church groups should have the space available for meetings before and after mass. It is ideally located and matches the design and intention of Holy Spirit, when it was built. It is a neighborhood church, and it blends in with the community. The rectory is an extension of this.

SECTION D
CONCLUSIONS

CONCLUSIONS

A. SATISFACTION WITH THE CHURCH

The level of satisfaction with Holy Spirit Parish is high at the present time. In fact, 89% of survey respondents overall and 96% 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.

People were especially appreciative of Fr. Michael and his leadership, and of the many ministries offered by the parish and the school.

Sources of discontent were minimal and seemed to center on a desire for more and better communication.

This all bodes well for your planned campaign.

B. PROJECT AWARENESS AND ACCEPTANCE

Seventy-six percent (76%) of survey respondents overall and 88% of those personally interviewed felt that they were either well informed or had a general knowledge of your needs and plans. Consequently, we view the level of awareness for your project to be fairly high at the present time. This is especially true of the planned STEM building at the school which has reportedly been talked about for years. People were not as aware, however, of your plans for the planned Parish Activity Center.

Acceptance for the proposed project overall was also fairly high with 77% of survey respondents overall and 85% of those interviewed saying that addressing your needs as expressed was either important or very important. This too, is obviously conducive to a successful campaign.

During the conduct of our study, we also assessed acceptance for the proposed project's major parts and found that both received majority acceptance among survey participants.

Rated the highest priority among those surveyed was your expressed needs and proposed plans for School STEM Building with a science lab, math classroom and development office. Eighty-eight percent (88%) of survey respondents overall and 96% of interview respondents rated this as important or very important to do. Some questioned the need for a new building per say, saying that perhaps the old convent could be remodeled to serve this purpose which is said to be virtually unused or, at the very least, underutilized at the present time. Others felt that there are various other maintenance issues at the school building that also need to be addressed and included and that equal attention needs to be given to space for fine arts. Nonetheless, plans for a School STEM Building were well received.

Your proposed plans for a Parish Activity Center with a parish hall, catering kitchen and administrative offices was rated as your second highest priority with 53% of survey respondents overall and 58% of interview respondents indicating this was important or very important to address. Most people see the need for a healthier and more modern office facility for parish staff as well as the need for a larger multi-use meeting and social space on the church campus which would eliminate having to have people travel to the school campus for various, and in particular, after Mass and other church service social activities. Yet others were not as thoroughly cognizant or convinced of the needs for and potential uses and benefits of such a space which include possible enhancement and expansion of parish programs, services and ministries; improved participation in after service

social activities and the strengthened sense of parish community; as well as the revenue generation possibilities from the rental of the parish center facility space which could help to offset operating costs and provide modest additional revenues. These needs and benefits will definitely need to be made clearer in the representation of the case for the project as part of the campaign. Some people too, were not happy with plans for razing the rectory seemingly mainly because of its' historical significance and that fact that it's an aesthetically fitting fixture in your local neighborhood and community. This underscores the importance of your emphasis in the case statement of the reutilization of the rectory's bricks and the importance of being sensitive to this desired aesthetics in the new buildings' design.

In summary, your overall plan was well received and people do seem to clearly understand and accept the basic underlying rationale for the project and its components. This too, is obviously conducive to a successful campaign.

C. CAMPAIGN AWARENESS AND ACCEPTANCE

Awareness of a fundraising effort designed to address your expressed needs is fairly high at the present time with 77% of survey participants overall and 92% of those personally interviewed saying that they knew a campaign was being considered or planned.

Acceptance for such an effort is viewed to be fairly high at the present time with 55% of survey respondents overall and 56% of individual interview respondents and saying that they felt that acceptance for such an effort would be "good" or "excellent."

Finally, it was also especially encouraging to note that 88% of survey respondents overall and 97% of interview respondents said that they would either make or consider making a gift to the campaign. This further demonstrates that a high level of supportiveness for your project and campaign effort already exists which underscores the importance of moving forward relatively immediately to address what most clearly see as critically important needs.

There was some sentiment that addressing the church and school's needs together in a single campaign would not work and therefore would be ill advised. This is seemingly because many believe that the church and school, their needs and constituencies are independent of one another. We don't concur with this line of thinking however. In fact, in our experience, each entity needs, depends on, benefits from and, as a result, should be mutually supportive of one another. Catholic schools have traditionally received substantial subsidies from their parent or sponsoring parishes which have offset what would have otherwise been much higher tuitions. In essence, each child who has ever attended a Catholic school has received a scholarship paid for by the parish and its membership. So, school parents, students, alumni and parents of alumni should be appreciative of and owe a debt of gratitude to their parent or sponsoring parishes. On the other hand, parent or sponsoring parishes have also benefitted considerably from Catholic schools traditionally because some of their most consistently supportive and generous members are families that have benefitted from a Catholic education. And a campaign like this gives each entity the chance to share these facts and build a mutual appreciation for one another. As a practical matter too, it also broadens each entity's support base and potential for support significantly. That's not to say however, that people shouldn't or wouldn't be able to restrict their gift to a particular portion of the project if they really wanted to. They should be able to do this. But, if the case for supporting both projects and entities are presented properly, most won't want to do this or, in other words, will choose to support the project and parish as a whole.

D. COMPETITION FOR FUNDS

Competition for philanthropic funds should not be a significant issue for you at the present time. In fact, 67% of survey respondents said that they did not know of any potentially conflicting projects or campaigns that were in progress or planned that might adversely affect your campaign plans.

Among those that were mentioned multiple times as potentially competing efforts were planned or potential campaigns for the Diocese of Sacramento and Christian Brothers High School.

In our experience however, campaigns for a Catholic high school have a limited impact on parish campaigns unless a disproportionate number of members are somehow formally connected to the school. A Diocesan campaign on the other hand could have a more widespread detrimental impact on a parish campaign because it will restrict the parish's own fundraising efforts, appeal to all of your members and diffuse the monies available for your parish project(s). This underscores the importance of getting out in front of and doing your capital campaign ahead of any planned Diocesan capital campaign effort.

E. VOLUNTEER AND VOLUNTEER LEADERSHIP POTENTIAL

Campaigns of this nature are not only volunteer intensive, they're volunteer dependent. Consequently, it is essential to have ample, able and willingly available volunteers and volunteer leadership for a successful campaign.

Ideally, you should have one volunteer for every five or six households that contributes

something at least annually to your church. In your case, with roughly 607 annually contributing households, this translates into having up to 101 people actively involved in the campaign as volunteers, at least ideally. At least 30% of these, or 30 people and ideally couples, would be needed to serve in key leadership capacities enlisting, soliciting and supervising other volunteers and volunteer leaders. And, as a general rule of thumb, you should have at least two candidates for every volunteer leadership position that needs to be filled. For your church, this means you should have a pool of at least 60 key leadership candidates to assure that these critical positions are filled. During the course of our interviews, 43 different individuals or couples were named among the best possible leaders for a campaign. This is less than the ideal pool of quality candidates that we would need, which indicates that you could have some problem attaining the quality and quantity of volunteers and volunteer leaders that we would ideally need and like to see for your campaign.

Willingness to work on the campaign, especially in a leadership role, is also critical to your success and something that we also assessed. And the study shows that 32% of those interviewed (who are presumably some of the most active and generous people to your church now) indicated a willingness to consider leadership positions in the campaign if offered or asked. This approximates the typical one-out-of-three willingness-to-lead response that we ideally like to see which indicates that you should not have problem attracting the quantity of leaders you would need for an optimally successful campaign.

On an even more positive note, is the fact that willingness to get involved in key leadership roles actually increased among those recommended to us most as the best possible leaders for your campaign. In fact, of the 13 individuals or couples recommended to us multiple times as being among the most capable leaders for your campaign, we interviewed or received survey responses from 9 of them, and 3 of the 9, or 33% indicated a willingness to get involved in a leadership role if

offered or asked. Furthermore, of the 4 individuals or couples that were suggested five or more times as being the best to lead your campaign, we interviewed or received a survey from 4 of them, and 2 of the 4, or 50% said that they would or might accept a leadership role in your campaign if it were offered to them. This willingness to get involved as key leaders among those mentioned most as the best to lead your campaign is significant in that campaigns of this nature tend to have somewhat of a bandwagon effect with most people waiting to get involved until those they know and respect most already have.

Additionally, it was encouraging to note that 59% of survey respondents said that they would or might work on the campaign in some capacity if asked, which is slightly higher than the one-out-of-two willingness to work response that we typically and ideally like to see.

So, in summary, your prospects for getting both the quality and quantity of volunteers and volunteer leaders that you would need for a successful campaign looks to be promising at the present time.

F. FINANCIAL POTENTIAL

A number of considerations are used to determine financial potential. All of the previously discussed criteria – satisfaction with the church, acceptance of the proposed project and campaign, competition for funds, and leadership potential – are all major considerations.

Another important criterion in estimating financial potential is the opinion of the church members themselves, since experience, for the most part, shows that people tend to perform at the level they think they are capable of, and rarely above. And, the study shows that a majority of those

interviewed (52%) believe that at least \$2,000,000 can realistically be raised over a three-year pledge period for your proposed campaign.

We also look at prospects for pacesetting gifts in evaluating a church's financial potential. To reach your capability in a fundraising effort of any significance, you would normally need and ideally receive at least one gift equal to 10% or more of your goal. Furthermore, you should have at least three prospective contributors rated as capable of making the top gift that you need. In your case, the top three rated prospects for gifts were consistently rated as capable of contributing an average of \$370,000 if they were so inclined. This would indicate a potential for raising at least \$3,700,000 under this financial formula.

We also looked at the top gifts that your people expressed a willingness to consider or make in evaluating your financial potential. And during the course of our study, the top gift(s) that any one person said they would be willing to consider or make was \$60,000. This would indicate a potential to raise \$600,000 under this financial formula.

Finally, one of the best barometers of financial potential is current giving. Normally, a church should be able to raise at least three times its annual offerings in a well-run and received campaign for a project of this type. And according to information provided to us, approximately \$525,000 in such income was received over the past 12 months. This would indicate a potential for raising at least \$1,575,000 in your campaign.

The average of the aforementioned indicators amounts to \$1,968,750. Consequently, we believe that you have the potential to raise a minimum of \$1,500,000 to \$2,000,000 over a three-year period in your planned campaign in addition to other funds that you may already or eventually have available for this project and campaign.

SECTION E
RECOMMENDATIONS

RECOMMENDATIONS

1. That you consider completing the project and/or the fundraising for it in multiple 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 that you commence with a campaign to raise the funds needed to complete both the School STEM facility and the Parish Activity Center facility all at once and then come back with second successive campaign to retire whatever debt may remain.
2. That you begin the planning and organizational work for your capital campaign as soon as possible, ideally right away and, in any event by no later than the first week of July so that your campaign can be completed by, before or shortly after the end of the year. This will enable you to take advantage of the high levels of satisfaction with your parish and school, 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 consider having us break out, organize and conduct a special and separate Pacesetting Gift Phase for your campaign during which we would devote extra time to seeking and securing some of the more significant lead gifts that will assure optimal campaign results and ultimate success. This special phase would be conducted first and apart from the more traditional Advance and Community Gifts phases of a church campaign where these more significant gifts

would typically be solicited in. Significant lead (or the top ten to fifteen campaign) gifts should provide up to 40% of more of your overall goal and more than any other gifts will determine the degree of your (or any) campaign's success. And these types of substantial lead gifts, which can help you to achieve more of your potential, do, in fact, exist in your church, but the willingness to give them, currently falls short of existing potential. Consequently, we believe that you could benefit from having additional time for cultivating and closing the few key gifts that are and will be so critical to a larger campaign's success. In fact, when recommended and done in other churches we have worked with, it has resulted in raising an additional one times a church's annual income. So even though adding a Pacesetter Gifts Phase would add slightly to the campaign's overall cost, it also has the potential to significantly enhance your campaign's results far beyond any additional expense. In short, it has the potential to be a very practical and worthwhile investment. If you elect to implement this suggestion, we recommend that this more private, quiet and non-public phase of the campaign be implemented in the early fall (September-October), that the rest of the campaign commence and be conducted in the late fall (November-December) and that the campaign wrap up in the early winter (January-February). This schedule would work particularly well in that your campaign would culminate around Catholic Schools Week.

4. That you establish a “minimum goal” for the campaign effort equal to the amount of money the diocese will require you to have on hand for the proposed project before you can commence with construction, which has normally vacillated between 50% and 60% in your diocese provided that the minimum goal amount set is between \$1,500,000 to \$2,000,000, which is in line with what we believe you can realistically expect to minimally raise in your campaign. We also suggest that additional, higher goals be set (e.g., a “groundbreaking goal,” if necessary, and an “ultimate goal” equal to the proposed project’s total cost), which will enable you to keep

people focused on your ultimate need and prevent them from becoming complacent once more minimal goals are met.

5. That you secure or begin to finalize plans and secure concrete cost estimates for the proposed project.
6. 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.
7. 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.
8. 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 facilities.
9. 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.
10. That as part of the preparation process for your campaign, you have us help organize and conduct a '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.

11. 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. This may help you to support any interim, short-term debt and increased operating expenses that you may incur as a result of this project and/or may enable you to finish your proposed project sooner than might otherwise be possible without it.

SECTION F
SUMMARY OF INTERVIEW RESPONSES

SUMMARY OF INTERVIEW RESPONSES

A total of 34 individual interviews were conducted, involving 52 individuals. In addition, 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 Holy Spirit Parish and the programs and services the church provides?
-

| | <u>No.</u> | <u>Percent</u> |
|-----------------------|------------|----------------|
| Very Satisfied | 35 | 66% |
| Satisfied | 16 | 30% |
| Somewhat Dissatisfied | 2 | 4% |
| Dissatisfied | 0 | 0% |

2. How well informed would you say that you've been about the church's needs and plans to build a Parish Activity Center and a school STEM building?
-

| | <u>No.</u> | <u>Percent</u> |
|------------------------|------------|----------------|
| Well Informed | 24 | 40% |
| Have General Knowledge | 29 | 48% |
| Know Very Little | 6 | 10% |
| Uninformed | 1 | 2% |

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

| | <u>No.</u> | <u>Percent</u> |
|----------------|------------|----------------|
| Very Important | 31 | 66% |
| Important | 9 | 19% |
| Nice to Do | 7 | 15% |
| Not Needed | 0 | 0% |

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. Parish Activity Center with a parish hall, catering kitchen and administrative offices. | 21 / 40% | 9 / 17% | 19 / 37% | 3 / 6% |
| 2. School STEM Building with a science lab, math classroom and development office. | 38 / 79% | 8 / 17% | 2 / 4% | 0 / 0% |

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

| | <u>No.</u> | <u>Percent</u> |
|-----|------------|----------------|
| Yes | 44 | 92% |
| No | 4 | 8% |

-
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 | 7 | 12% |
| Good | 25 | 44% |
| Fair | 20 | 35% |
| Poor | 5 | 9% |

7. The cost of the project is estimated to be in the \$3,000,000 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> |
|-------------------------|------------|----------------|
| \$3,000,000 or More | 23 | 62% |
| \$2,500,000 - 2,999,999 | 2 | 5% |
| \$2,000,000 - 2,499,999 | 0 | 0% |
| \$1,500,000 - 1,999,999 | 0 | 0% |
| \$1,000,000 - 1,499,999 | 11 | 30% |
| Less than \$1,000,000 | 1 | 3% |

-
8. In your opinion, who would be the best people to lead a fundraising campaign for Holy Spirit Parish if we could get them?
-

(Names provided under separate cover.)

-
9. In your opinion, who are the members who might be capable of making the largest gifts if they were so inclined?
-

(Names provided under separate cover.)

-
10. In your opinion, what individuals and institutions outside of the church community (e.g., former members, businesses and organizations, etc.) might have the potential and willingness to make significant gifts?
-

(Names provided under separate cover.)

-
11. If a campaign is conducted, do you think you might consider or accept a campaign leadership position if asked?
-

| | <u>No.</u> | <u>Percent</u> |
|-------|------------|----------------|
| Yes | 6 | 12% |
| Maybe | 10 | 20% |
| No | 34 | 68% |

12. If not a leadership position, would you work on the campaign in some other capacity?

| | <u>No.</u> | <u>Percent</u> |
|-------|------------|----------------|
| Yes | 7 | 27% |
| Maybe | 9 | 35% |
| No | 10 | 38% |

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

| | <u>No.</u> | <u>Percent</u> |
|-------|------------|----------------|
| Yes | 30 | 88% |
| Maybe | 3 | 9% |
| No | 1 | 3% |

14. If you were to make a gift, what range gift do you think you might consider over a three-year time period?

Of the 33 individuals or couples who were interviewed and said they would make or would consider making gifts, 27 mentioned specific amounts or a gift range they might consider. The highest gift or range gift that any one individual or couple said they would make or consider was in the \$60,000 range. 2 individuals or couples said they would make or consider such a gift. Specified gifts ranged from a low total of \$394,500 to a high total of \$522,500.

15. Are you aware of any other campaigns that are in progress or being planned that might conflict with a campaign for Holy Spirit Parish?

| | <u>No.</u> | <u>Percent</u> |
|-----|------------|----------------|
| Yes | 15 | 47% |
| No | 17 | 53% |

16. Do you have any other comments or suggestions that you think might be important or helpful to this study or in planning a campaign?

(Comments included in Section C.)

SECTION G
SUMMARY OF OTHER RESPONSES

SUMMARY OF OTHER SURVEY RESPONSES

A total of 42 other responses were received and tabulated. In some cases, if two or more people filled out the survey at the same time (a husband and wife, for example), individual responses may have been recorded. At other times, two answers may have been given by an individual to a single question. For example, some may have responded that acceptance of a campaign would be "fair" to "good." In addition, there were times when a person was not able or did not answer certain questions. This explains why the total number of responses does not always equal the total number of individuals surveyed. In addition, percentages may not add up to 100% due to minor differences in rounding.

-
1. How satisfied are you with Holy Spirit Parish and the programs and services the church provides?
-

| | <u>No.</u> | <u>Percent</u> |
|-----------------------|------------|----------------|
| Very Satisfied | 31 | 40% |
| Satisfied | 35 | 45% |
| Somewhat Dissatisfied | 12 | 15% |
| Dissatisfied | 0 | 0% |

2. How well informed would you say that you've been about the church's needs and plans to build a Parish Activity Center and a school STEM building?
-

| | <u>No.</u> | <u>Percent</u> |
|------------------------|------------|----------------|
| Well Informed | 20 | 25% |
| Have General Knowledge | 34 | 42% |
| Know Very Little | 20 | 25% |
| Uninformed | 6 | 8% |

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

| | <u>No.</u> | <u>Percent</u> |
|----------------|------------|----------------|
| Very Important | 34 | 42% |
| Important | 24 | 30% |
| Nice to Do | 17 | 21% |
| Not Needed | 6 | 7% |

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. Parish Activity Center with a parish hall, catering kitchen and administrative offices. | 12 / 29% | 8 / 19% | 13 / 31% | 9 / 21% |
| 2. School STEM Building with a science lab, math classroom and development office. | 22 / 52% | 11 / 26% | 6 / 14% | 3 / 7% |

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

| | <u>No.</u> | <u>Percent</u> |
|-----|------------|----------------|
| Yes | 54 | 68% |
| No | 26 | 32% |

-
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 | 10 | 12% |
| Good | 35 | 42% |
| Fair | 23 | 28% |
| Poor | 15 | 18% |

7. The cost of the project is estimated to be in the \$3,000,000 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> |
|-------------------------|------------|----------------|
| \$3,000,000 or More | 18 | 27% |
| \$2,500,000 - 2,999,999 | 4 | 6% |
| \$2,000,000 - 2,499,999 | 6 | 9% |
| \$1,500,000 - 1,999,999 | 12 | 18% |
| \$1,000,000 - 1,499,999 | 9 | 14% |
| Less than \$1,000,000 | 17 | 26% |

8. If a campaign is conducted, do you think you might consider or accept a campaign leadership position if asked?
-

| | <u>No.</u> | <u>Percent</u> |
|-------|------------|----------------|
| Yes | 2 | 2% |
| Maybe | 10 | 12% |
| No | 68 | 85% |

9. If not a leadership position, would you work on the campaign in some other capacity?

| | <u>No.</u> | <u>Percent</u> |
|-------|------------|----------------|
| Yes | 14 | 18% |
| Maybe | 32 | 40% |
| No | 34 | 42% |

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

| | <u>No.</u> | <u>Percent</u> |
|-------|------------|----------------|
| Yes | 39 | 49% |
| Maybe | 28 | 35% |
| No | 13 | 16% |

11. If you were to make a gift, what range gift do you think you might consider over a three-year time period?

Of the 67 individuals or couples who said they would make or would consider making gifts, 27 mentioned specific amounts or a gift range they might consider. The highest gift or range gift that any one individual or couple said they would make or consider was in the \$20,000 range. One individual or couple said they would make or consider such a gift. Specified gifts ranged from a low total of \$53,550 to a high total of \$92,100.

12. Are you aware of any other campaigns that are in progress or being planned that might conflict with a campaign for Holy Spirit Parish?

| | <u>No.</u> | <u>Percent</u> |
|-----|------------|----------------|
| Yes | 21 | 27% |
| No | 56 | 73% |

13. Do you have any other comments or suggestions that you think might be important or helpful to this study or in planning a campaign?

(Comments included in Section C.)