

# St. James Parish

## Summary of the Planning Survey

Charitable Management Group, (CMG), is pleased to present this Summary Report & Recommendations to St. James Parish. Specific objectives of the survey sought to introduce **Renewing Our Community of Faith**, the parish's proposed development initiative; subsequently assess parishioner support; and corresponding commitments of volunteer leadership and financial support. Twenty-eight interviewees, 604 in-Mass survey respondent, 38 school family respondents and a joint meeting among 24 parish ministry and school representatives served as the basis for collection of statistical and narrative data, our evaluations and subsequent recommendations.

### SUMMARY OF SURVEY RESULTS

#### SUPPORT FOR RENEWING OUR COMMUNITY OF FAITH

- ✚ 83% of Mass and school respondents support **Renewing Our Community of Faith**, nominally above CMG's normal response range of 70-80%. Among remaining respondents, 14% require additional information and 3% disagreeing. A near unanimous positive response was received among personal respondents and joint ministry meeting participants.
- ✚ 63% of Mass respondents **agree** with **planned investment of \$2.0 million** to fund projects associated with **Renewing Our Community of Faith**; with the remaining 34% requiring additional information and 3% disagreeing, within CMG's normal response range of 60-70%. A positive response was received among personal respondents and Joint ministry meeting participants.
- ✚ Among the eight initiatives associated with **Renewing Our Community of Faith**, with the exception of the solar array, no less than 70% of Mass survey respondents indicated each initiative as being **very important** or **important**. The response regarding the solar array was nominally less with 65% of Mass respondents indicating it as being very important or important.
- ✚ Among personal interviewees and joint ministry meeting participants, certain issues were raised as follows: A need for greater transparency regarding parish finances; a detailed project budget/timeline for planned initiatives; vetting and prioritization to assure identified projects are a need versus a want; dissemination of a cost/benefit analysis for the solar array; and a handful of individual projects were not well supported.

#### CONDUCT A FUND RAISING CAMPAIGN

- ✚ 72% of in-Mass survey respondents **agree** with the proposed **plan to conduct a fund raising campaign** within CMG's normal response rate of 70-80%. A further 24% indicated a need for more information and the remaining 4%, disagreeing. Among personal interviewees most supported a proposed campaign and joint ministry meeting participants agreeing with the plan and 86% of school respondents similarly support undertaking a campaign.

#### ATTEND A MEETING/ASSIST ON A COMMITTEE

- ✚ 50% of Mass respondents are willing to **attend one meeting** within CMG's normal response rate of 50-60%. 20% require additional information and the remaining 30% are unwilling. 70% of school respondents, most personal interviewees and joint ministry meeting participants similarly voicing their willingness to attend a meeting.
- ✚ 14% of Mass survey respondents indicated a willingness to **assist on a committee** nominally below CMG's normal response rate of 15-25%. An additional 34% indicated a need for more information and 52%, declining participation. 24% of school respondents, 50% of personal interviewees and finally, all joint ministry meeting participants are willing to assist in some capacity.

#### MAKE A GIFT TO A CAMPAIGN

- ✚ 45% of Mass survey respondents are willing to **financially support a proposed campaign** nominally below CMG's normal response rate of 50-60%. 31% indicated a need for additional information and 24% unwilling to contribute. 52% of school respondents, most interviewees and all joint ministry meeting participants are willing to contribute.

#### RANGE OF GIVING

- ✚ 60% of in-Mass survey respondents indicated a **preliminary level of financial commitment**. Among those, 68% indicated a preliminary gift level of below \$3,000. An additional 16%, at \$3,000+; 10% at \$5,000+; 5%, at \$10,000+; and, two respondents indicating their support at \$25,000 and above. Among interviewees, while most declined to indicate a projected level of giving, those doing so identified giving ranges from below \$5,000 upwards to \$50,000. Range of giving response is modestly lower than typically experienced by CMG in other surveys.

## **EVALUATION SUMMARY**

### **SUPPORT FOR *Renewing Our Community of Faith***

- ✚ Considerable **support** exists for *Renewing Our Community of Faith* with certain caveats as follows: **Church Renewal** strongly supported, yet limited support exists for the video projection system, an elaborate baptistry and a preference for refinishing pews and kneeler replacement. **Solar Array** - questions/concerns exist – will the project pay for itself and when; and, a preference for self-funding in lieu of a diocesan loan. **Campus Renewal Initiative** - an absence of support exists for new signage, landscaping or water fountain redesign. **Rectory Renewal** was well supported with calls for project expansion to include a new kitchen. Remaining initiatives were all generally well supported requiring no substantive changes.

### **LEADERSHIP FOR A CAMPAIGN**

- ✚ Survey findings reveal 132 individuals **willing to serve as campaign volunteers**. With a prospect base of 700 parishioners with a record of contribution in 2016-17 and 192 school families, the volunteer to prospect ratio of 1:7 indicates a sufficient base of volunteers exist to effectively personally contact the 900 +/- prospective donor base. Remaining registered parish members with no record of offertory contribution would out of necessity require solicitation by mail and/or in-Mass solicitation.
- ✚ In advance of the proposed campaign's active phase, a three week organization phase, led by members of the Organizing Committee, must adopt as their primary objective identification and recruitment of an additional 15-20 members to serve on the executive committee, who will provide oversight for the parish-wide fund raising effort.

### **PROSPECTIVE DONORS**

- ✚ The St. James Parish & School community voiced reasonable levels of financial support to achieve success in a campaign. However, an immediate goal of \$2.0 million may not be feasible, due to certain fundamental issues, namely: insufficient parish/school families with a record of contribution; many major donors to the Memorial Center campaigns are no longer affiliated with the Parish; the case for funding is not aspirational; and, donor fatigue exists among significant contributors to the memorial center debt retirement/HVAC system/church roof replacement.
- ✚ Therefore, CMG recommends an initial **CELEBRATION GOAL** of \$1.5 million to fund church, school, rectory, memorial center and parish campus renewal initiatives; and, amortize costs associated for the planned solar array. Should the campaign exceed the **CELEBRATION GOAL**, an additional **VICTORY GOAL** of \$500,000 with funds allocated to bolster the parish reserve fund. Gifts and pledges will be payable over a four-year period.

### **SUMMARY RECOMMENDATIONS**

Survey results demonstrate St. James Parish has reasonable support among the parish and school communities to initiate planning and organizational initiatives for conduct of a campaign. CMG respectfully presents the following summary recommendations:

1. CMG recommends St. James Parish further develop and refine the scope of *Renewing Our Community of Faith*, specifically project details, costs, priorities and anticipated benefits of each of the eight funding initiatives.
2. CMG recommends a pervasive communications initiative be implemented to disseminate information pertaining to the eight funding initiatives, campaign progress and other relevant factual/inspirational data.
3. CMG recommends St. James Parish undertake a parallel three-week organization phase, which would have as its primary focus the recruitment of the campaign's Executive Committee, and to the degree possible, personal cultivation of prospective lead donors.
4. CMG recommends that members of the Campaign Executive Committee adopt as their mandate two primary objectives: Serve as the major gifts committee, playing a central role in cultivation and solicitation of gifts of \$10,000 and above; and, recruitment of a sufficiently large enough volunteer corps for the effective solicitation of the parish community.
5. CMG recommends upon successful recruitment of the Executive Committee, the campaign be conducted over a fifteen-week period, with a stated objective of contacting/soliciting parish families with a record of contribution in 2016-17 and all school families.
6. CMG recommends installation of an online giving platform to allow gifts and pledge payments be made electronically.
7. CMG recommends an adjunct spiritual renewal initiative run parallel to fund raising activities, encompassing thought-provoking homilies, witness talks by parishioners, inclusion in parish ministry activities, etc.