

INTRODUCTION

At the invitation of the Church of Saint Joseph MARK DAVY & ASSOCIATES conducted a feasibility study to determine the implementation of a proposed capital campaign.

DAVY & ASSOCIATES conducted 55 interviews which involved 86 influential and interested parishioners. Additionally, we did a mail survey to gain a broader base of opinion and support the validity of the interviews. We received responses representing 165 households. Both groups will be important to the success of the proposed campaign.

To obtain candid responses, we assured participants that their answers would be held in confidence. For this reason, comments included in this report are not identified or quoted by name.

This report represents a comparison of interviews and surveys. We have summarized our observations and made recommendations for the campaign.

FEASIBILITY STUDY OBJECTIVES

The primary objectives of the study were to determine:

1. The awareness level of the faith community regarding this campaign. This helps isolate areas which the education and cultivation phase will address.
2. How important and essential the faith community believes this project to be.
3. The strong points and questions that might affect this project. This process also helps determine the thrust of a future educational plan – playing on strengths and enhancing them -- determining the areas of concern so they can be addressed.
4. The level of potential leadership within the parish to conduct a successful drive.
5. The level of financial support in the faith community available for this project.

For a campaign to be successful there are certain necessary prerequisites:

1. There must be potential funding available to make this a successful drive.
2. The vision statement explaining the needs should be easily understood and accepted by the community.
3. There must be a core of enthusiastic, informed, well-trained and influential leaders willing to accept this challenge.
4. Leadership of the parish must play an active and intensive role in spearheading this campaign.

Church of Saint Joseph

St. Joseph, Minnesota

FEASIBILITY STUDY

1. How informed are you of the projects presented in the case statement?

	<u>INTERVIEW</u>		<u>SURVEY</u>	
	<u>NUMBER</u>	<u>PERCENT</u>	<u>NUMBER</u>	<u>PERCENT</u>
Very well informed	18	21	22	13
Reasonably well informed	44	51	61	37
Somewhat informed	21	24	74	45
Uninformed	3	4	9	5

The persons interviewed were slightly more informed of the issues in the vision statement than those responding through the survey. The fact that twenty-eight percent of those interviewed and fifty percent of those surveyed responded "somewhat informed" or "uninformed" indicates a need for a comprehensive education program.

2. What forms of communication do you find most effective?

	<u>INTERVIEW</u>		<u>SURVEY</u>	
	<u>NUMBER</u>	<u>PERCENT</u>	<u>NUMBER</u>	<u>PERCENT</u>
Quarterly newsletter	12	9	70	22
Weekly bulletin	67	49	129	41
Weekly e-mails	31	23	36	12
Web site	3	2	18	6
Mass announcements	24	17	54	17
Other	0	0	5	2

The weekly bulletin and quarterly newsletter were indicated as the most effective ways to receive communication regarding the parish. During the campaign all forms of communications should be utilized, but the results demonstrate the communication vehicles that get the most attention.

3. How important do you believe each project is to the future well being of the Church of Saint Joseph?

INTERVIEWS

Project	Very Important	Important	Somewhat Important	Unimportant
Maintaining facilities	78	5	3	0
Accessible restrooms	58	24	4	0
Hospitality room	19	29	35	3
Gathering space	36	27	20	3
Social hall	22	29	25	10

3. How important do you believe each project is to the future well being of the Church of Saint Joseph?

SURVEY

Project	Very Important	Important	Somewhat Important	Unimportant
Maintaining facilities	121	35	3	1
Accessible restrooms	88	53	16	4
Hospitality room	19	44	61	29
Gathering space	36	48	49	21
Social hall	26	40	52	37

Maintaining facilities and accessible restrooms are seen as the most important project in both the interviews and surveys.

INTERVIEWS

4. What do you consider to be the two or three of the Church of Saint Joseph's top strengths?

- Fr. Joseph (32)
- School (16)
- People (12)
- Liturgy (12)
- Sense of community (11)
- Music program (10)
- 4th of July celebration (7)
- Welcoming (7)
- Parishioner/parent participation (7)
- Friendly (6)
- Very good leadership team (5)
- Communication (5)
- Volunteers (4)
- Young families (4)
- Benedictine tradition (3)
- Work together (3)
- Outreach to people in need (3)
- Sermons (2)
- Feels like home (2)
- Small parish (2)
- Location (2)
- Staff (2)
- Strong tradition (2)

SURVEY

4. What do you consider to be the two or three of the Church of Saint Joseph's top strengths?

- Fr. Joseph (39)
- Parish school (22)
- Liturgies (15)
- Historic church and the faith community (13)
- Committed volunteers (10)
- 4th of July social event (9)
- Music (9)
- Dedicated parishioners (9)
- Leadership (6)
- Office staff (6)
- Good people (6)
- Welcoming (6)
- Working together (6)
- Faith formation programs (6)
- Large congregation (5)
- Involvement and support from parishioners (5)
- Willingness to give (4)
- The value of tradition (4)
- Dedicated school staff (4)
- Good work ethics (3)
- More social justice minded than many other parishes (3)
- Very well built beautiful church (3)
- Good communication (3)
- Benedictine values (3)
- Diverse congregation (3)
- Serving the community (3)
- Strong faith (3)
- More social justice minded than many other parishes (3)
- Many loyal parishioners (2)
- As a community and parish we benefit from Saint John's Abbey, St. Benedict's Monastery and the students at CSB & SJU. (2)
- Daily Mass (2)
- Dedication of the parents of the school children (2)
- Friendly atmosphere (2)
- Community that strives to demonstrate inclusion of all parishioners (2)

INTERVIEWS

5. Would you see any areas of concern that may affect a capital campaign?

- Economy (30)
- Raising the money (14)
- Lack of parishioner participation (9)
- Not meeting our budget (8)
- Communication needs to improve (8)
- Future of the school (7)
- Location of the future buildings (5)
- How to incorporate old buildings with new building concepts (4)
- Unemployment (4)
- Financial situation of parishioners (4)
- Make sure the money is going to projects (3)
- Senior population (3)
- Timing (2)
- Conservative members (2)
- Not strong enough commitment to giving (2)

SURVEY

5. Would you see any areas of concern that may affect a capital campaign?

- Economy (62)
- Unemployment (16)
- Receiving financial support from all parishioners (10)
- Survival of lab school (9)
- Need more information on the campaign (7)
- Our senior population (6)
- Inflation (6)
- Financial strain on families (5)
- Not making our weekly budget (5)
- The “old” families in the parish not accepting some of the changes that may need to be made to better the facilities (5)
- Money (4)
- People’s loss of wages (4)
- Cost (2)
- Lack of interest by too many families (2)

INTERVIEWS

6. Who, in your best judgment, would be the three to five persons who could provide the necessary leadership to make a capital campaign successful?

- Kevin Kluesner (16)
- Peter Spaniol (10)
- Tom Stock (10)
- Judy Hansen (7)
- Norm Hansen (7)
- Mike Meyer (6)
- Nettie Pfannenstein (6)
- Rich Schwegel (6)
- Tom Klecker (5)
- Laurie Stock (5)
- Bruce Bechtold (4)
- Andy Hawkins (4)
- Jenny Meyer (4)
- Joe Meyer (4)
- Merlin Bauer (3)
- Lloyd Bruemmer (3)
- Peggy Boettcher (3)
- Mark Gohmann (3)
- Amy Kluesner (3)
- Gary Kraft (3)
- Kay Medelberg (3)
- Dave Thelen (3)
- Rick Baron (2)
- Claire Bauer (2)
- Jim Boettcher (2)
- Jeff Botz (2)
- Tom Ethen (2)
- Fr. Joseph Feders (2)
- Erinn Hawkins (2)
- Jerry Klaphake (2)
- Meg Klecker (2)
- Mary Ann Krebsbach (2)
- Gary Renick (2)
- Sandy Scholz (2)
- Karl Terhaar (2)
- Ann Thelen (2)
- Bryan Backes
- Gary Bechtold
- Patty Bechtold
- Victor Boeckmann
- Carol Danielson
- Doug Danielson
- Todd Dierkes
- Nancy Drontle
- Tim Ebel
- Cory Ehlert
- Bill Elfering
- Bob Ethen
- Mitchel Evens
- Diane Gideon
- Ryan Gideon
- Tom Heinen
- Chuck Kern
- Ann Klein
- Tom Klein
- Helen Krebsbach
- Tom Krebsbach
- Gary Kuefler
- Pat Kutzera
- Connie Lacher
- Terry Loso
- Judy Meemken
- Marty Meyer
- Susan Meyer
- Ellen Murray
- Julie Notsch
- Lori Pfannenstein
- Tom Schindler
- Darla Schwegel
- Kristi Spaniol
- Bob Valek
- Jean Weyer
- Ray Weyer

SURVEY

6. Who, in your best judgment, would be the three to five persons who could provide the necessary leadership to make a capital campaign successful?

- Kevin Kluesner (20)
- Father Joe Feders (9)
- Tom Stock (9)
- Michael Meyer (8)
- Peter Spaniol (8)
- Norm Hansen (7)
- Bruce Bechtold (6)
- Meg Klecker (6)
- Gary Bechtold (5)
- Lori Pfannenstein (5)
- Nettie Pfannenstein (5)
- Gary Renick (5)
- Judy Hansen (4)
- Tom Klecker (4)
- Gary Kraft (4)
- Rick Baron (3)
- Andy Brixius (3)
- Mark Gohmann (3)
- Doug Danielson (2)
- Deacon Tom (2)
- Carolyn Heinen (2)
- Tom Klein (2)
- Mary Ann Krebsbach (2)
- Kay Medelberg (2)
- Wayne Paquin (2)
- Jeanette Pfannenstein (2)
- Alex Schleper (2)
- Sandy Scholz (2)
- Rich Schwegel (2)
- Bob Valek (2)
- Elaine Anderson
- Karen Backes
- Mark Berg Arnold
- Pat Bechtold
- Jeff Botz
- Ed Brophy
- Ron Eiyneck
- Rosanne Eiyneck
- Bernadette Ethen
- Bernard Evans
- Don Fischer
- Alan Glatzel
- Dan Goebel
- Andy Hawkins
- Steve Heymans
- Mary Kay Hoeschen
- Pete Jansky
- Tammy Johnson
- Chuck Kern
- Gerry Klaphake
- Brian Klein
- Hubert Klein
- Amy Kluesner
- Tom Krebsbach
- Beth Leither
- Mark Leither
- Lisa Martone
- Mark Martone
- Jenny Meyer
- Joe Meyer
- Judy Meyer
- Marty Meyer
- Steve Meyers
- Tom Murray
- Anita Reber
- Joanne Schneider
- Kurt Schneider
- Ann Thelen
- Robert Valek
- Kathy Wahl
- Dave Waletzko
- Nikki Wensmann
- Dale Wick
- Don Wieber

7. A capital campaign will need many volunteers to ensure its success. If asked, would you accept a leadership or supportive role?

	<u>INTERVIEW</u>		<u>SURVEY</u>	
	<u>NUMBER</u>	<u>PERCENT</u>	<u>NUMBER</u>	<u>PERCENT</u>
Yes	29	34	5	3
Would consider	34	40	45	28
No	23	26	109	69

Both the interview and survey percentages indicate some willingness to accept or consider a leadership or supportive role. While the percentages seem low, these represent a normal response as people are reluctant to commit when they are not sure of the job description or specifics of the project. In a more positive sense, there is a pool of 113 people who would agree to or consider taking a leadership or supportive role.

8. Would you make a gift to the capital campaign, above and beyond your ordinary giving, payable over a three-year period?

	<u>INTERVIEW</u>		<u>SURVEY</u>	
	<u>NUMBER</u>	<u>PERCENT</u>	<u>NUMBER</u>	<u>PERCENT</u>
Yes	46	84	47	29
Would Consider	6	11	91	57
No	3	5	23	14

Responses to this question were positive, ninety-five percent of those interviewed said “yes” or “would consider”, while eighty-six percent surveyed responded “yes” or “would consider” a gift.

9. If so, in which level would your gift be:

GIFT CHART

<u>Level I</u>	<u>Level II</u>	<u>Level III</u>
\$100,000 +	\$ 20,000	\$ 4,000
\$ 75,000	\$ 15,000	\$ 2,000
\$ 50,000	\$ 10,000	\$ 1,000
\$ 25,000	\$ 5,000	\$ 500

	<u>INTERVIEW</u>		<u>SURVEY</u>	
	<u>NUMBER</u>	<u>PERCENT</u>	<u>NUMBER</u>	<u>PERCENT</u>
Level I	4	8	0	0
Level II	22	45	8	7
Level III	23	47	100	93

Responses were encouraging with thirty-four interview and survey participants indicating their willingness to make a gift at Level I or II. Overall, the results show a strong base of support. However, with seventy-eight percent of people surveyed responding at Level III, donor sights must be raised to consider larger gifts if the campaign is to be successful. This will occur through education and process.

10. Without making a commitment, could you share with us what your gift might be?

\$ _____ per year for three years, totaling \$ _____

Responses are confidential

11. If asked, would you include the Church of Saint Joseph in your will? (trust, annuity, insurance or bequest)

	<u>INTERVIEW</u>		<u>SURVEY</u>	
	<u>NUMBER</u>	<u>PERCENT</u>	<u>NUMBER</u>	<u>PERCENT</u>
Yes	5	9	3	2
Would Consider	26	47	52	38
No	13	23	77	56
Already in	12	21	5	4

The response to this question indicates potential for future funding and a need to further communicate opportunities for planned gifts. A number of participants have already included Saint Joseph in their estate and many others responded “yes” or “would consider”. The leadership of Saint Joseph should make a concerted effort to educate or increase their education to parishioners on the benefits of planned gifts.

INTERVIEWS

12. If you could advise the leadership of the Church of Saint Joseph on a capital campaign, what advice would you give them?

- Communicate (12)
- Move forward (8)
- Educate everyone (9)
- Get everyone on board (7)
- Leadership is doing a good job (7)
- Study is a great idea (7)
- Enhancing of the physical appearance to attract younger families (6)
- Be careful on how you ask (5)
- Reach out to all parishioners (4)
- Be positive (3)
- Get money up front (3)
- Be transparent (3)
- Do maintenance first (3)
- Stop rumors (3)
- Provide sketches of what might be planned (3)
- Pray (3)
- Ask for in-kind gifts (2)
- Do project in front of church (2)
- Keep it simple and effective (2)
- Blend the new building with the old (2)
- Meet with small groups (2)
- Keep the project realistic (2)

SURVEY

12. If you could advise the leadership of the Church of Saint Joseph on a capital campaign, what advice would you give them?

- Be careful in this economy (9)
- Make the best decision possible for the people of Saint Joseph Parish (6)
- Need to live within our means (5)
- Make sure you have enough money before you start building (4)
- Use various forms of communication (4)
- Encourage prayerful support of the campaign (4)
- Spend on what the church needs not wants (3)
- Have a visual concept model available for folks to view and be able to see what is planned (3)
- Be prepared for a lot of work (2)
- Start with maintaining our facilities (2)
- Plan in affordable phases (2)
- Be realistic (2)