



November 29, 2018

We wish to extend our thanks to all for the cooperation, support and gracious hospitality extended to Charles Fisher throughout the feasibility study process recently completed.

A special word of thanks goes out to Bruce Watts, Cathy Klein, Bill Brown, Tom Eaton and Rev. Terri Hobart for coordinating the personal interviews and the mailing of the questionnaires.

During the implementation process, we found friendly, concerned, and open communication regarding the proposed campaign and project plans. A total of 43 units participated in the survey; 10 interviews were conducted, 13 responded to the mail questionnaires, and 20 responded to the online survey. This represents a total response rate of 61% among the members of the church community that were contacted.

This study is our distillation of the information, opinions, and ideas gathered through the survey. It represents our combined evaluation and appraisal of major factors related to the proposed campaign.

Now important decisions must be made to continue the momentum essential to the success of a campaign. The Episcopal Church Foundation welcomes the opportunity to provide further assistance.

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I. Tentative Case Statement	

## Executive Summary

Building on St. Luke's Holy Conversations in the fall of 2017 and further input gathered in Discernment meetings in late summer 2018, ECF engaged parishioners in Feasibility Study interviews and surveys regarding "Continuing the Legacy, Embracing the Future" during October and November of 2018.

The purpose of the study was to determine the willingness of the parish to support a proposed capital campaign to raise up to \$350,000 for restoration of the organ, necessary improvements to the worship space, and renovation of the Great Hall kitchen.

All members of the parish were invited to participate in the feasibility study and 61% responded to the survey via personal interviews, direct mail, and an electronic emailed survey. Based on experience, this is an excellent response rate.

Many responses generally indicate a feeling of excitement and revitalization from just simply having a project developed in this way, along with other factors, pulling St. Luke's together as a community with a shared purpose. Responses indicate 98% of the respondents support a capital campaign. In addition, 81% of the respondents expressed a willingness to make a financial contribution. 30% indicate a willingness to consider a volunteer role in a campaign. All of these are strong indicators that there is support.

By using the ranges of estimated gifts that respondents indicated, and applying factors which account for as yet unidentified gifts, as well as other relevant factors noted in the responses, ECF recommends a primary goal of \$287,700 in a capital campaign.

With a realistic goal, and with ECF's solicitation process, there is great potential for a successful capital campaign. Even though the amount recommended is lower than the initial overall goal, there appears to be full-congregational support for these initiatives.

I understand current events including the devastating fires and a project lead's accident are impacting the lives of your parishioners and your timing, and you remain in my prayers. ECF recommends that you take time to thoroughly read the results and pray over the recommendations listed in the report, and let us help determine an appropriate path forward, and communicate plans intentionally and publicly with the congregation. I am available to discuss this report at your convenience and we are prepared to provide a contract for the Solicitation phase when you are ready to review it.

Regards,

Charles Fisher

*Section One:*

**Conclusions, Recommendations and Methodology**

## I. Introduction

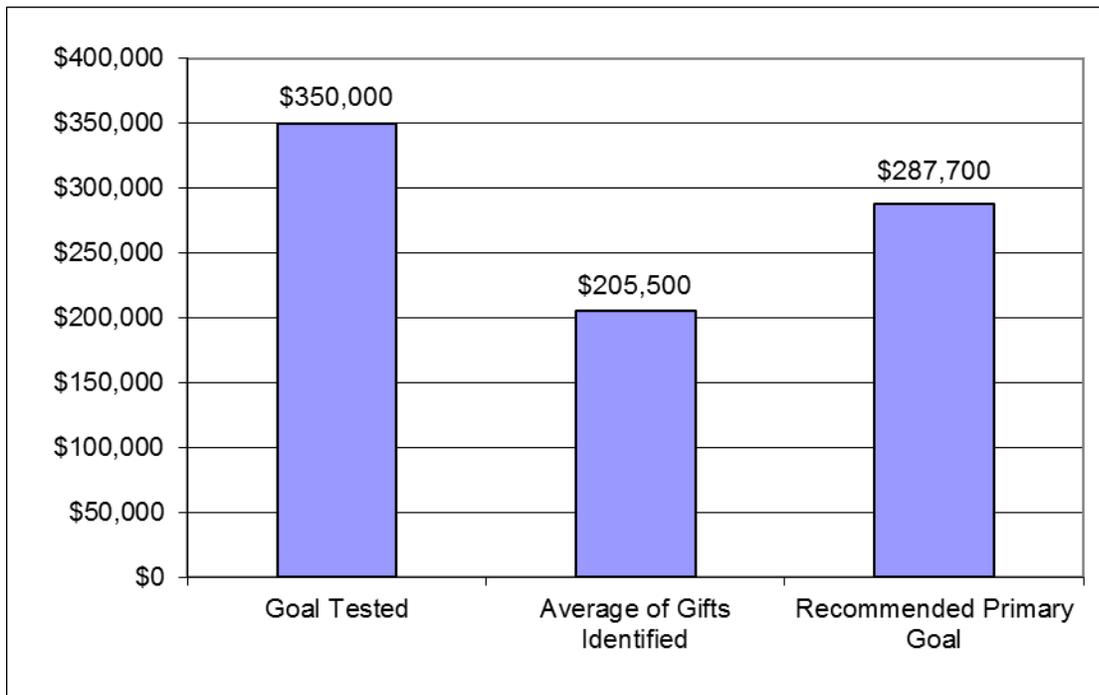
For some time the leadership of St. Luke’s Episcopal Church, Woodland, CA, has been evaluating the parish’s programs, facilities, and resources, and assessing the capital needs of the church. After much study and the involvement of many people, the Vestry authorized the Episcopal Church Foundation to conduct a combined discernment and feasibility study to explore the willingness of the congregation to support financially these identified needs.

The facts, findings, and recommendations of the resulting survey, now completed, provide a sound basis for leadership decisions with regard to the future of a fund drive. A complete description of the goals of the proposed plans may be found in the tentative case statement in the Appendix.

## II. Conclusions

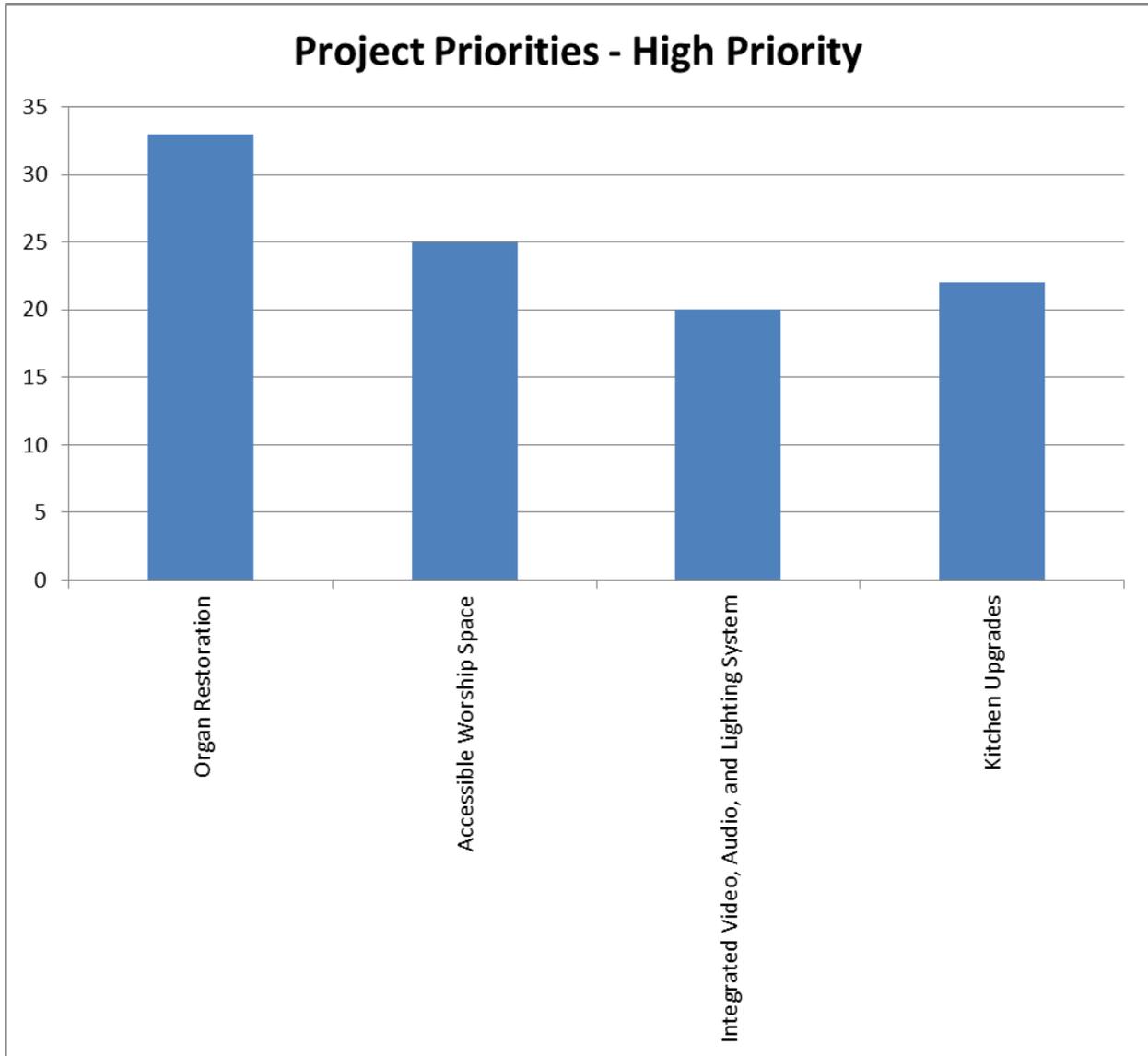
### Gift Potential

Experience tells us we can take the average between the low estimate (\$157,500) and the high estimate (\$253,500) of the pre-campaign projections revealed in the Study and multiply by a factor of 1.4 when certain percentages and comments (such as revealed in this study) are attained. Thus the average, \$205,500, when multiplied by this factor (1.4) reveals a suggested goal of \$287,700. This recommendation is made factoring in the reality that additional gifts, not yet identified, will be forthcoming; hence the multiple of 1.4.



## Awareness of Need

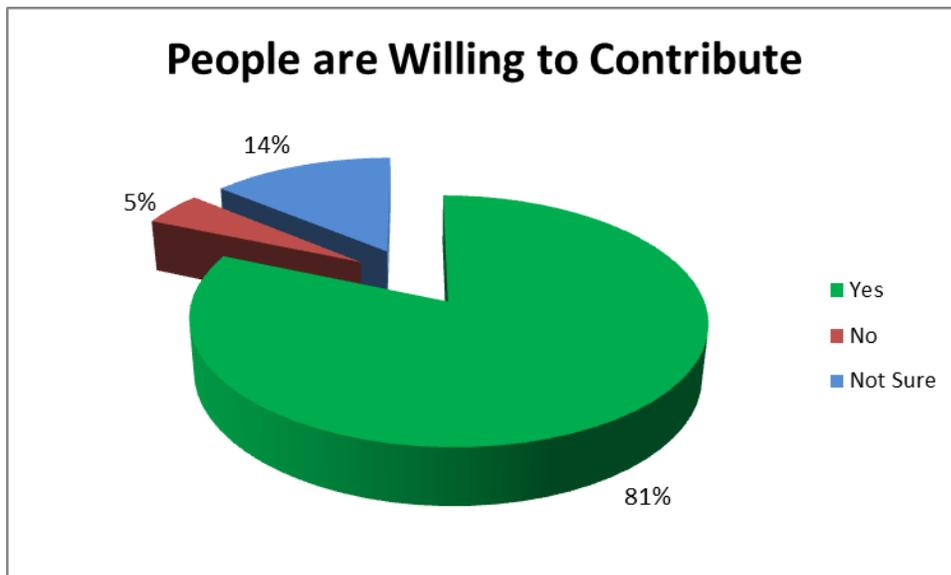
A majority of respondents (93%) were aware that St. Luke’s Episcopal Church is considering a possible campaign, and 98% were also aware of some or all of the proposed plans. Of course, not all the items received the same degree of support. Present awareness of need is a positive; however, each project should be studied and prioritized with consideration given to the degree of support and the resources available.



## Interest in and Support for a Capital Drive

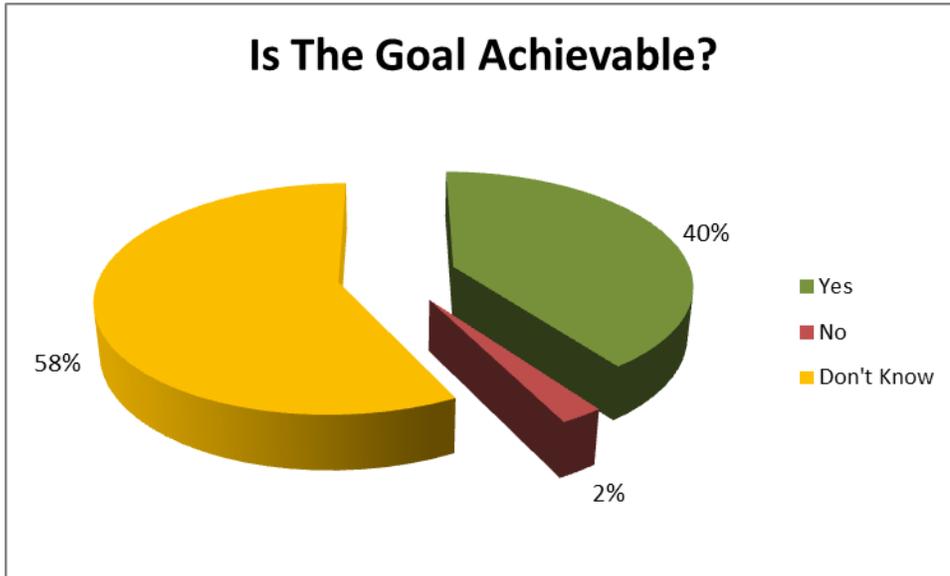
There is significant indication of support for the proposed campaign, but also signs that suggest caution. Positive signs from respondents include:

1. Ninety-eight percent are in favor of the campaign, although some with reservations.
2. Only 7% are opposed to the proposed campaign timing.
3. Eighty-one percent of respondents would give to the campaign.
4. Thirty percent are willing at this early stage to consider a volunteer position.

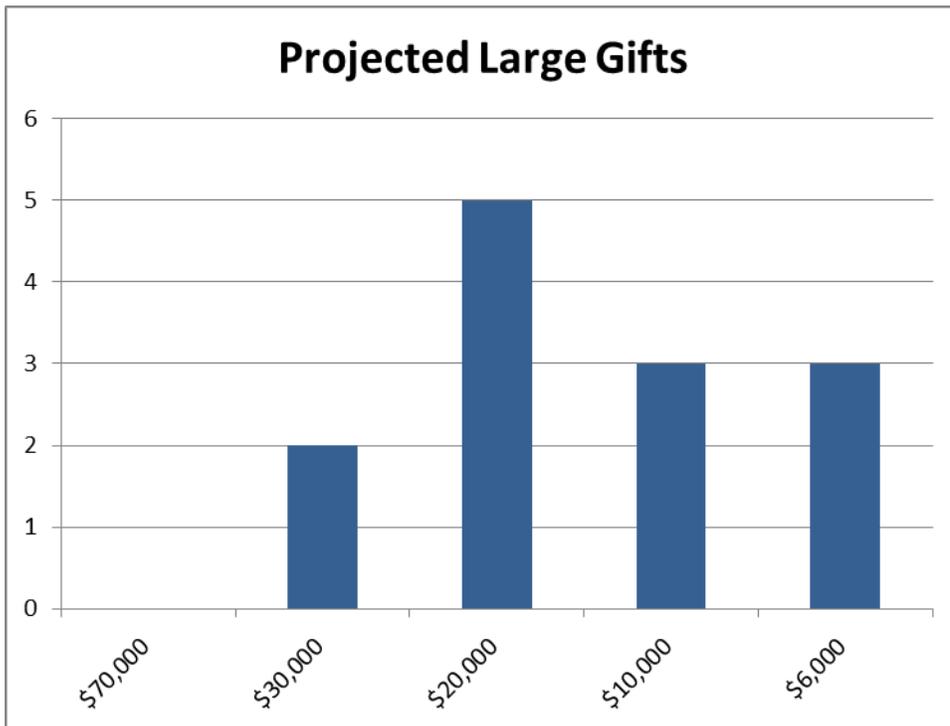


## Concerns

1. Approximately 40% of respondents feel the goal is reachable. Two percent feel it is too high. The remaining 58% had no opinion on whether this goal can be achieved. This is an indication that the proposed goal may be too high.



2. Too few gifts were reported at this early date to allow a goal of \$350,000 to be fully embraced.



## Influential Leadership

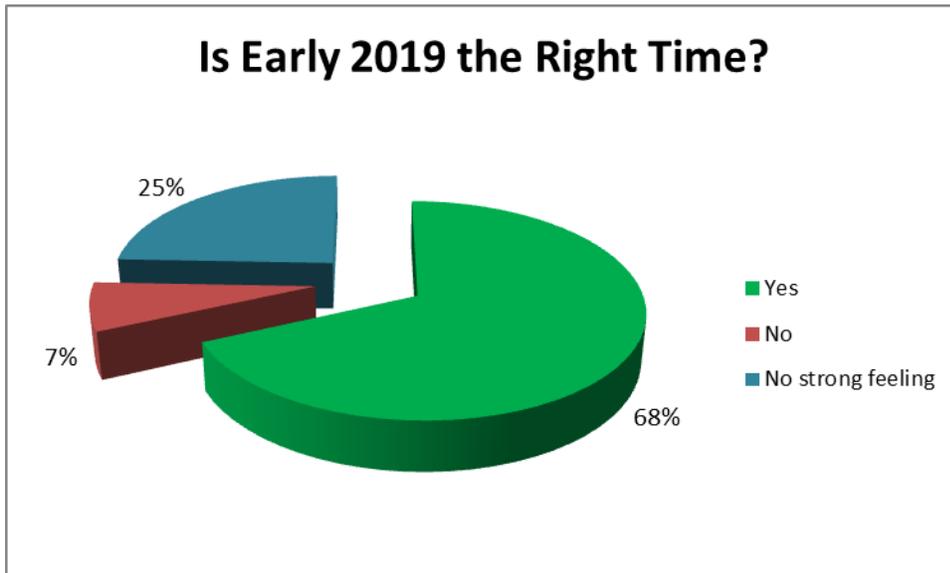
Strong leadership—both financial and volunteer—is absolutely essential for the success of any campaign. A leadership core is presently in place. It is the challenge of this leadership group to expand involvement within the parish, including other individuals who may have significant giving potential. With involvement comes commitment.

## Planned Giving

A few people requested planned giving information, and four indicated the church was already in their estate plans. This is encouraging and suggests that such future gifts could be used to help build endowment or retire indebtedness.

## Campaign Timing

The respondents endorsed the proposed campaign timing. Of course, decisions on the priorities of projects must be made. It is imperative to revisit the proposed plans and make appropriate changes in the size of the effort, the proposed goal, and other sources of funding.



### **III. Recommendations**

#### **Recommendation #1**

The information revealed in this Study suggests that a capital campaign for a Primary Goal of \$287,700 is realistic and appropriate. This presupposes that an assertive campaign involving the entire constituency would be launched, and that the type of methodology used by the Episcopal Church Foundation would be followed.

Recognizing that immediate needs are greater than what is revealed in the Study, leadership may wish to consider \$287,700 as the “primary” goal and establish a larger “challenge” goal, which would encourage the congregation to stretch to longer pledges—five years rather than three years, for example.

If the “challenge” was not reached, the congregation would still experience success by achieving the “primary” objective, but hopes would be high that the challenge, at least in part, could be accomplished.

#### **Recommendation #2**

Planned giving activities should be pursued during the campaign in an effort to encourage major gifts to underwrite the future of the church. Such gifts, often deferred and received in future years, are helpful in reducing mortgages or indebtedness. The Episcopal Church Foundation is responding to individual requests for information on planned giving.

#### **Recommendation #3**

Review the Tentative Case Statement and make final decisions based on the financial feasibility revealed in the Study. Consider also the prioritization suggested by respondents.

#### **Recommendation #4**

Share as soon as possible the revised plans with the congregation and seek increased consensus. Increase significantly all publicity concerning this project.

#### **Recommendation #5**

Once the leadership has had an opportunity to review the Study recommendations and revise the proposed plan, a timetable such as the following should be considered to maximize success:

Months 1-2	Determine campaign calendar and budget. Announce goal. Begin materials development (pledge cards, brochures, letterhead, etc.). Recruit and train campaign leadership and support committee chairs. Evaluate Advance Gift prospects.
Months 2-3	Continue to train leadership. Complete materials development. Begin Advance Gift solicitation. Contact planned giving prospects, if appropriate.

Months 3-4

Prepare for and launch the Congregational Gift division. Hold kick-off event. Begin personal solicitations and monitor solicitation efforts.

Months 4-5

Finalize all calls. Set up pledge collection and acknowledgment systems. Hold Celebration Event to acknowledge conclusion of the campaign and recognize the leadership and volunteers.

### **Recommendation #6**

Select professional management to guide and direct the campaign to ensure efficiency and the implementation of a proven, successful fundraising methodology.

## **IV. Methodology**

### **A. The Feasibility Study**

As the parish considers a capital campaign, it should reflect on several important questions:

- ◆ What conditions are essential to a successful campaign in the church community?
- ◆ How much money realistically can be raised?
- ◆ Will the church community support a drive that fulfills the goals of the proposed plans?
- ◆ When should the campaign begin, and how long should it last?
- ◆ What volunteer leadership is available to head the campaign?

Determining the answers to these and other questions was the major purpose of the Feasibility Study. Through the Study we have researched, analyzed, and evaluated fundamental factors present, or capable of development, which might influence a capital campaign.

The study was conducted in three phases: research, personal interviews, and direct mail/online.

#### **Phase I**

An examination of the proposed needs, development of a “Tentative Case Statement,” determination of optimum campaign goals and timing, and review/selection of personal interview prospects were completed during sessions with the parish leadership.

#### **Phase II**

A sampling of parish members was selected for personal interviews. A total of 10 interviews were ultimately conducted by Charles Fisher of the Episcopal Church Foundation.

#### **Phase III**

A mail survey was sent to 28 households. Included in the mailing was a letter requesting participation in the survey, the questionnaire, the tentative case statement and a self-addressed return envelope.

An online survey was sent to 33 households. Included in the mailing was a letter requesting participation in the survey, the online questionnaire, and the tentative case statement.

## STATISTICAL NOTE:

- ◆ A total of 28 direct mail questionnaires were mailed to the parish community.
- ◆ Of those, 13 were returned: a mail response rate of 47%.
- ◆ A total of 33 online surveys were sent to the parish community.
- ◆ Of those, 20 were returned: an online response rate of 61%.
- ◆ Including the 10 who were interviewed, 71 units were exposed to the study. Of those, a total of 43 units or 61% participated.
- ◆ Based on experience, this response rate is an excellent representative involvement from the parish community, lending credibility to the study findings.
- ◆ Of the total that participated, the majority, 69%, attend worship services one or more time(s) per week.
- ◆ Regarding the financial-giving practices of those who responded, the majority, 74%, are regular contributors with a written annual pledge.
- ◆ In importance of charitable donations, St. Luke's ranks as the most important charity that respondents donate to, with 54% rating it as such. Another 37% rank it in their top five charitable donations.

## **B. Elements of a Successful Campaign**

There are certain elements which must exist in connection with every successful fundraising campaign.

1. Recognition and acceptance of the “tentative needs” as expressed.
2. The case for widespread appeal.
3. Availability of strong financial leadership.
4. The capability of existing leadership to recruit additional support.
5. Past and current support levels for other church-wide capital campaigns.
6. The congregation’s awareness of the proposed plans.
7. The economic optimism of the parish community.
8. Overall response to goal attainability.
9. Indicated interest in contributing to, and projected levels of support for the proposed campaign.
10. Projected timing of the campaign.

These elements are carefully reviewed in this report. The Conclusions and Recommendations Section of this report addresses the elements of success as we consider the readiness of St. Luke’s Episcopal Church to proceed with a major capital campaign.

*NOTE: Minor editing has occurred in the comments to ensure grammatical accuracy and preserve the anonymity of the feasibility study respondents. Also, the spelling of some names could not be verified.*

*Section Two:*

**Composite Analysis and Summary of  
Personal and  
Direct Mail / Online Responses**

# Results from 10 Personal Interviews, 13 Direct Mail and 20 Online Responses **Total of 43 Responses**

*Note: Not all respondents answered all questions.*

## Awareness of Need

### **1. Prior to this survey, were you aware that the parish was considering a capital campaign?**

40 Yes      3 No

Ninety-three percent were aware that St. Luke's Episcopal Church is considering a capital campaign. This is a positive indication that the church leadership has prepared the ground for a major capital campaign.

### **2. Prior to this survey, were you aware of the needs as expressed in the accompanying proposed plans?**

37 Aware      1 Not Aware      5 Aware of some of the needs

Eighty-six percent of the respondents were aware of the capital needs of St. Luke's Episcopal Church. Another 12% were aware of some of the needs. Only one respondent was not aware of the needs. This is an indication that the leadership has done a fine job of communication.

### **3. Are there additional needs that seem important to you which are not covered by the proposed plans?**

*Comments:*

A different topic - Scholarships for training such as Education for Ministry – something like \$375/semester. Would like to see more outreach.

Not as important, but have always thought using the facilities for a Charter School Nursery through 8th grade is a good idea.

Would like to see shower facilities in the Great Hall and laundry for winter homeless shelter and other uses. They are working on a grant from the Diocese separately for this work, so this doesn't take away from these projects. (2)

Downstairs restored to usability – but that’s long range.

Would like to see us talk through a Labyrinth, but not now.

Not as important but, bathrooms for youth. Note that the Great Hall Renovation (intended to allow playing basketball) included new windows, but no screen/covers to prevent them from being broken.

Yes, bathrooms in the Great Hall and renovating the Great Hall Basement for preschool use.

I just want to make sure the space for wheelchairs in the Sanctuary is in Phase 2. It looks like it is.

Need specific strategy to attract more young families.

Safety treads on the stairs exiting the kitchen in the Great Hall.

Kitchen, floor, and drainage.

#### **Interest in and Support for a Capital Drive**

#### **4. Generally speaking, do you favor the parish conducting a capital campaign as outlined in the proposed plans?**

35 Yes

1 No

7 Yes, but with some concerns

Eighty-two percent are in favor of the campaign, with another 16% in favor with some concerns. Only one respondent was opposed to the campaign. This is a sign that the church community is willing to support a campaign.

#### *Comments:*

Concerned something else might come up that needs to be addressed.

It’s important just to pick projects and move on – there will always be other projects later. I like the fact that some of the projects allow the church to have a new revenue source.

A little wobbly on whether we can do it. It’s challenging but if we are going into the future, we need to see how we do in raising money and coming together for a project.

Surprised that the 7:30 service people in discussions are strongly in favor of the Organ project, even though they don’t have music at that service.

Worried about whether we can raise the money.

Seems all the right communications are in place now. Don't perceive any glitches; people have been expressing themselves and there doesn't appear to have been any "railroading" of ideas.

It's essential – it's the future! We have to change things to keep ahead of losing our teenagers; we don't have enough children in the church.

If the money can be raised to fund the projects we are in favor of most of the plans, but the parish should not go into debt to fund the projects.

Approve of improvements to the worship space and the Great Hall, but not convinced about the organ.

**5. Please indicate the level of priority you would attach to each of the projects outlined in the proposed plans by checking the appropriate line under each heading. At present, they are listed in no particular order.**

*\*Select only one option per line and feel free to make comments (use an extra sheet if necessary).*

	PRIORITY				
	High	Medium	Low	Opposed	Lack Information
a. Organ Restoration	<u>33</u>	<u>9</u>	<u>1</u>	<u>0</u>	<u>0</u>
b. Accessible Worship Space	<u>25</u>	<u>11</u>	<u>5</u>	<u>1</u>	<u>0</u>
c. Integrated Video, Audio, and Lighting System	<u>20</u>	<u>18</u>	<u>4</u>	<u>0</u>	<u>1</u>
d. Kitchen Upgrades	<u>22</u>	<u>14</u>	<u>5</u>	<u>1</u>	<u>0</u>

*Comments:*

Bottom is the kitchen – based on impressions of what other people think. The top three are the church itself. Emphasis and attention – High Profile – is the organ. The organ and liturgy are the core of the church and we are in danger of losing the organ.

Personally, need the sound upgrade. It's important to spend the money in the right order to make the projects all successful.

The Organ, Accessibility, Integrated Audio sort of come together. Don't really care much about the kitchen elements or compliance with codes. Accessibility doesn't deliver much bang for the buck, but improved usability of the space with movable pews in the choir, ability to use it as a stage, etc. is good – but if it was a choice getting able to host a Charter School would be more important.

The first three are a package deal and considered together. The Kitchen Incubator – concerned whether we really have the expertise to help develop businesses. Recitals and catering make the kitchen important. Concerned whether parking will be an issue. In Accessible Worship Space – the whole floor should be level rather than still having to step up into choir pews.

Stained Glass Windows brought me here, liturgy brought me here (prior Missouri Synod Lutheran) – a key part of the total atmosphere.

Wendy (prior priest) led us into being who we are. The windows need the organ to complete the atmosphere.

The organ is so basic to worship and church and has been for 40 years. The kitchen is really needed it's very old. Not so sure about needing the floor leveling, though it's likely a part of the organ repair and the acoustics may drive that – so on the Integrated Video, Audio – don't make me learn any technology. I liked the days when people just learned to project with their voice.

The organ is one of the things that keeps me here, and Accessibility and Audio system seem to be related – so they are really all one project.

Just not interested in doing the Accessible Worship Space, though not opposed to it – only one person in a wheelchair, so not that much need. Interested in the audio part of the system, but not much on video – who watches those anyway?

I am thinking now that the kitchen upgrades perhaps need high priority, due to preparing food for the preschool kids. We need appropriate sanitary facilities.

The organ is an integral part of worship and should be refurbished; however, the upgrades shouldn't be a priority if they put the congregation into debt. The kitchen project would need to have a few persons/businesses commit to regularly renting the facility. Woodland is a small city and unless there are people lined up to rent the facility, it seems like a major expense that is risky and not necessary. The kitchen project would also increase operating, maintenance and insurance costs for the church.

To address these issues at a later time is not cost effective.

Hearing is important.

**6. In your opinion, what major positive factors does the parish have in its favor for the proposed campaign?**

*Comments:*

Enthusiasm is around the organ. If we do the organ, there will be support to do the others. If it's successful it will add to the enthusiasm overall in the church.

The proposal has wide breadth (age-wise) of support for the programs proposed. It can be implemented in stages separately if need be.

This church is the rock upon which I stand. Whatever makes it viable ongoing. The Church is beautiful and this aids in my personal relationship with God.

Music is an important part of the service. 10:00 people come for the music, and 7:30 people asked not to have music even at Easter because it makes a longer service – even with that 7:30 people support the organ.

Wide diversity of people are being brought together to a unified purpose. We are seeing the church brought alive and not becoming a museum for the windows.

Hard to believe we have a person as skilled as Terri with a congregation this size. This project will prove the truth about “Can We” accomplish something with small contributions.

The campaign is reviving the spirit within the church; excitement about the roots of the church. There has been open communication between the two camps – folks entirely in favor and some questioning. Excited to use the church like never before. This change in approach to making decisions is appropriate. Everyone hears the problems with organ so that is easy.

Structure of the project and organization of the work thus far. Congregation is really brought into the process; the Vestry has been brought into the process. The Rector is an excellent administrator with skills and vision. Seems to be a good time to do all this work and there is a positive atmosphere in the church.

The organist is fabulous – extraordinarily great musicianship Makes people happy and brings others into the church. Now is always the right time to do something like this - move forward!

Most people think it's a good idea.

Church is strongest we've seen it in 50 years. Superb rector.

Great communication and general support of the project across the active parish. Superior musician (Dean Mora) to make best use of the refurbished organ. Improving ties to the community to make best use of improved assets.

Enthusiasm and a motivation to embark on some new and exciting projects. (2)

Honoring our legacy for the organ, creating more revenue and outreach opportunities with the kitchen, and the altar renovation will help to take care of our own and minimize the chances of someone falling.

People were very engaged in the conversations we had. We are in a stable financial situation as far as I know. Dean the organist is a positive factor.

I think it is a small but very committed church membership. We have an aging population and we want to preserve and improve the unique features of the church.

A very dedicated congregation and rector.

An enthusiastic committed group of parishioners and a wonderful leader!

We have a generally affluent congregation. We value art and music and helping the community.

Solid base of support in the congregation.

Reasonable level of interest, talents, commitment and energy. (2)

Involved congregation; financial stability.

Changes will affect each person in some way. The church will become a more welcoming place because of the proposed changes.

Making access to the altar available for all. I also support the work for upgrading the kitchen.

St. Luke's is a beautiful, historic church which should be maintained. There are many enthusiastic proponents of the projects.

High community visibility and participation. Reduce maintenance and energy costs. The marketability of the church's facilities will increase revenue.

Young leadership.

Potential for further outreach in the community; availability to share space and organ. (2)

The facility must be kept in top functioning order to remain visible. Members are proud of the church and want to share and bring in new members. There are possible money making functions that could result from the upgrades.

A close knit community.

## 7. What challenges, if any, do you foresee for this project?

### *Comments:*

Church dynamics; we suffer from limited energy due to the ages of the people and some dying off, particularly the big donors. Terri has done a fantastic job, but it takes time to turn a big ship around. We are financially stable but with those large donors dying off it may be a challenge.

Funding, and agreed upon priorities in the church. Caution that we think through the whole implication of the projects. Should focus on how this affects the people, versus physical facility. Concerned that we are “changing the bait which gets people to church” to meet the competition (Charismatics, strip mall churches, hard liners, mega’s, multi-mega’s). It has been the liturgy and tradition, but are we using these physical things now. Even with evolving beliefs, as a “Thinking Church” we should stick with what we believe and the organ is an integral part of worship.

Busy lives (e.g. working mom’s) leaves less time for people to devote to church related activities.

Tax reform structure makes it hard to take a write-off.

Church is really very small – not sure the effort to attract diverse new members of the congregation will attract people who will really help pay for things.

Raising the money/getting enough money. (9)

Demographics and Secularization – California generally moving away from church. We should do this now because there will likely be an economy crash.

This was known as a wealthy church, so people didn’t come here. Not sure we have the energy to raise this much money now.

Some people wrestle with new ideas in the old facilities. I’ve heard some lack of understanding about the need for accessibility, but that’s based on ignorance about the intent. People six months ago were worried about change, but not as much now.

There are fewer and fewer of us. Used to be two dozen at 7:30 service, and 4-5 have passed who were a big part of donations. A challenge is to avoid being reckless and not losing trust of the congregation.

Many people who attend are paycheck to paycheck. Hard times for many.

There is not a general recognition of how time critical the organ restoration is; it could fail any time and people still don’t seem to get that.

Not sure congregation can afford it.

Potentially thin financial ability in both numbers and depth within the parish, due to aging and attrition. May have to go outside of active parish for fundraising efforts.

Unknowns/change orders on the organ and altar renovations resulting in cost increase and time out of the worship area.

Getting money from outside the usual members of the congregation or from the community outside the church.

Capital!

Available manpower to complete the major projects involved with this campaign.

It's going to cost a lot of money, take a long time, and piss a few people off.

Aging congregation with many on fixed incomes and therefore additional bequests are a challenge.

Sustained involvement and participation. The "stages" to planning create manageable blocks.

Many different foci; multiple changes for congregation to adapt to.

Continued excitement and commitment to funding this project.

An aging congregation. If the church finances the project, there needs to be assurance that future giving will cover the cost to pay the debt. The debt would probably outlive many of the current parishioners. Young families attend church less frequently and aren't able to contribute as much financially.

Building code requirements and accessibility issues (which change at a rapid rate). Parishioners who resist change.

Number of those willing to give.

Underestimated costs.

Downtime during construction.

Deciding which projects to undertake if money isn't available.

**8. What added ideas or suggestions do you have which might be helpful to the leadership in making this important decision to consider moving forward with the campaign?**

*Comments:*

Need to get to old-time Woodland people who may not go to church here, but would be interested. Worried we haven't already started fund raising – would think people want to get a contribution in this year when charitable contribution deductions are definable – may change any time with current government.

Try to rectify the age trend by establishing new young leaders and more regular attendees. Make sure everyone knows that the organ will be favored if we run short of money.

Find ways to expand funding sources e.g. grants.

Protect the atmosphere in the church while growing. Terri breathes new life into the church, keep her involved in sharing the message for the campaign.

Continue to seek out people to advocate for this and willing workers to do the work. Get people to speak to the congregation about why they are giving and expand this beyond clergy and Vestry.

Focus on causing this to be a purpose for the church. Get to know our neighbors via providing organ, kitchen, etc. for the community.

Consider the issue that we don't have a parking lot and how that affects people who travel to get to the church. Strive to make this a positive experience whether we meet all these project goals or not.

Continue to create excitement. Focus on the positive. Keep an "up-up-up spirit".

Make sure that there is a process for making priority choices. Guard against doing all the projects at a lower level of quality – do things well or don't do them.

Do a financial planning seminar to help people deal with these types of issues.

Start an immediate publicity campaign in the community to engage other people in the coming improvements. Start a weekly column in Saturdays newspaper. Have concerts for the public to include them in fund raising. Disappointed we have not started sooner on the ask portion.

We should go ahead and do public concerts to raise awareness in the broader community.

I believe they should leverage the audio visual system to put sermons online and begin to build a broad presence in the Episcopal Church. People will gravitate to Terri.

I'd like to see us offer a Resource Navigator service or course for folks who don't know how to interpret insurance documents, financial choices, new to town, etc.

Keep suggesting ideas....the more ideas there are, something is going to arouse some support somewhere.

Need to expand our target audience to other civic groups and we need to explore potential grants and or "free monies" that may be available.

We've been talking about this for months. Really at this point I think it's just about whether we can get the money to get it done.

The organ repair and, to a lesser extent, the audio system, is a make-or-break upgrade for the church. Without these, it's the beginning of the end. In short, dig deep if we don't get all the money. We HAVE to do this.

We have suggested additional emphasis on generating income from outside use of the facilities. In addition, if the church becomes more visible in the community, additional families may consider membership.

Tremendous gratitude to our vestries which have grown so much over time in their practices and concerns for our faith community. We will do what we can to provide continuing support.

Continue to involve members in the planning and work.

Security and surveillance issues.

Get the youth and young adults excited about the projects.

How many members contribute now? How much is the annual budget? Do we need for or more years?

### **Leadership**

#### **9. If asked, would you be willing to work on a committee in support of the proposed capital campaign?**

13 Yes      14 No      16 Not sure at this time

Thirty percent would be willing at this early date to volunteer. Another 37% are not sure at this time and may be persuaded to participate as the campaign plans are formulated. This is a relatively good response at this stage in the process. It appears likely that an adequate number of workers would be attracted to the campaign.

**10. In addition to those already involved, please offer the names of other parishioners that you think would make good volunteers to help with the proposed capital campaign?**

Janeen Castillo  
Tom Eaton  
Katie Huff  
Larry Main  
Cheryl Mitchell  
Barbara Shreve                    2  
Bruce Watts

**Campaign Timing**

**11. Does a proposed solicitation period for pledges in early 2019 seem appropriate to you?**

  28   Yes        3   No       10  No strong feeling

More than half of the respondents, 68%, are in favor of the proposed timing. Twenty-five percent expressed no strong feeling one way or another. The remaining 7% were opposed to the campaign timing. This is an endorsement that a campaign could proceed as scheduled.

**Gift Potential**

**12. Do you know of any individuals, foundations, or other sources that might support these proposed plans? If you have a personal tie to any of these, would you be willing to make an introduction to them of the campaign leadership? If so, please indicate and we will be in touch once the campaign goes forward. (Please include mailing address, phone number, and email address if possible.)**

A confidential listing of responses had been provided to leadership.

**13. Do you think a goal of \$350,000 (as outlined in the proposed plans) can be raised in gifts and pledges?**

 16  Yes        1  No       23  Don't Know

Forty percent believe the goal can be attained, while another 58% have no opinion if it can be reached. Another 2% do not believe the goal can be attained. Normally, we like to see at least a majority believing the goal is feasible. Generally when less than half are confident about the projected goal, the proposed goal is usually too ambitious.

*If no, how much do you think can be raised?*

\$200,000

Probably can raise more. (2)

**14. If convinced of the need, would you be willing to contribute to this proposed campaign?  
(All gifts, regardless of size, are needed and are important to the success of the proposed campaign.)**

  35   Yes        2   No        6   Not sure at this time

Eighty-one percent would be willing at this early date to contribute to the campaign, while another 14% expressed that they are not sure at this time. Only two respondents indicated a negative response. This is positive and an indication that the campaign can proceed.

**15. If "yes," please estimate your possible total range of giving. Please refer to the chart in the case statement to see the number of gifts needed and monthly payments over 3 years. *This is not a pledge or in any way binding.***

<u>  3  </u> \$500 or less	<u>  6  </u> \$500 to \$1,000
<u>  8  </u> \$1,000 to \$2,000	<u>  4  </u> \$2,000 to \$4,000
<u>  3  </u> \$4,000 to \$6,000	<u>  3  </u> \$6,000 to \$10,000
<u>  5  </u> \$10,000 to \$20,000	<u>  2  </u> \$20,000 to \$30,000
<u>  0  </u> \$30,000 to \$70,000	<u>  0  </u> \$70,000 and above

**Typical Gifts Essential to the Success  
of a \$350,000 Capital Campaign**

Size of Gift	# Needed	Gifts Indicated in Study*
\$70,000	1	0
\$30,000	3	2
\$20,000	2	5
\$10,000	5	3
\$6,000	7	3
\$4,000	6	4
\$2,000	8	8
\$1,000	9	6
\$500 and below	Many	3

\*Using the high range estimate

Respondents projected donations ranging from a low of approximately \$157,500 to a high of \$253,500. While not indicated in the chart above, not all gift amounts were given within a range as presented. Some were given as singular amounts, e.g., \$5,000, instead of \$3,000 to \$5,000. The high and low estimates have been adjusted accordingly. These early estimates fall short of supporting \$350,000 as a primary goal.

### Legacy Giving

**16. In addition to making a gift to the proposed campaign, some parishioners may wish to explore planned or legacy gifts. Check the blank next to the item(s) of interest. Materials will be sent to you from the Episcopal Church Foundation via e-mail.**

- 4   Make a gift to your parish through a bequest in your will.
- 0   Create a charitable gift annuity (minimum gift of \$5,000).  
Benefits of a charitable gift annuity could include:
- receive guaranteed income for life (i.e. current rates of approximately 4.7% annually at age 65, approximately 5.8% annually at age 75)
  - receive an income tax deduction now for the gift portion
  - receive some tax-free income from the investment until your life expectancy age
  - possibly reduce applicable estate and inheritance taxes
  - enjoy the satisfaction that at the death of the final income beneficiary, the remaining principal would go to an Episcopal congregation or entity you designate
- 0   Create a Charitable Remainder Trust with appreciated assets (minimum gift of \$100,000)
- 0   Create a Pooled Income Fund gift for life (minimum gift of \$2,500)
- 0   Donate appreciated real property such as a house, vacation home, farm or business
- 3   Send me the *Overview of Planned Giving* brochure which explains planned gift options further
- 3   Add me to the Episcopal Church Foundation e-newsletter on estate planning.

**16a.   4   St. Luke's Episcopal Church is already in my will or estate plans.**

Four individuals have already included the church in their estate plans. A few others have indicated they would welcome information. They will receive information confidentially from the Episcopal Church Foundation.

## **A Final Word**

The Episcopal Church Foundation thanks the leadership of St. Luke's Episcopal Church for the opportunity to work with the parish family. We enjoyed our work on your behalf and would welcome the opportunity to be of service.

Thank you, and best wishes.

*Section Three:*

**Appendix I:  
Tentative Case Statement**