

SACRED HEART OF JESUS PARISH

Boulder, Colorado

Pre-Campaign Feasibility Study Report and Recommendations



June 26, 2005

Presented by:
Cargill Associates, Inc.
Fort Worth, Texas

June 26, 2005

Father William Breslin
Sacred Heart of Jesus Parish
2312 14th Street
Boulder, Colorado 80302

Dear Father Breslin:

The opportunity to conduct a Pre-Campaign Feasibility Study for Sacred Heart of Jesus Parish has been a distinct privilege and pleasure. The Cargill Associates staff members conducting the study were graciously received by those interviewed. We wish to express appreciation to those who gave counsel and assistance in assembling the necessary information used in preparation for the Pre-Campaign Feasibility Study.

This report is based on **69** leadership interview participants and parishioner questionnaires from **223** respondents. Also included is a thorough analysis of registrants, attendance, and giving trends for the last five years.

The recommendations presented are sound and in keeping with professional principles and experience.

Sincerely yours,

A handwritten signature in black ink that reads "Pat Graham". The signature is written in a cursive, flowing style with a long horizontal flourish at the end.

Malcolm "Pat" Graham
President

MPG/lab
Enclosure: Pre-Campaign Feasibility Study

TABLE OF CONTENTS

Section	Page
I. Introduction.....	1
II. Determination of Priority and Potential.....	6
III. Compilation of Responses	7
IV. Observations	28
V. Recommendations.....	30

I. Introduction

A. History

Founded in 1875, Sacred Heart of Jesus Parish has an extensive history of providing Christian ministry to Boulder, Colorado. Its mission calls the parishioners:

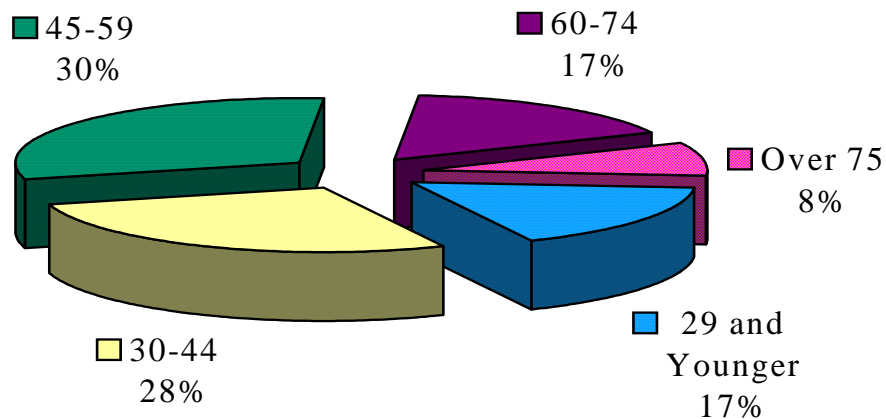
To bring to life the heart of Jesus Christ in the parish, in its school, and in the greater Boulder area.

Sacred Heart of Jesus Parish offers five Sunday Mass services as well as four additional weekday services. Religious Education classes are provided for all ages. (The parish's average attendance is illustrated in graphs on the following pages.)

As the parish celebrates its 130th year of ministry, it continues to respond to the changing needs of the parishioners and community. This study was commissioned to evaluate the potential of raising funds for church renovations, school health and safety renovations, site and grounds improvements, and a school addition.

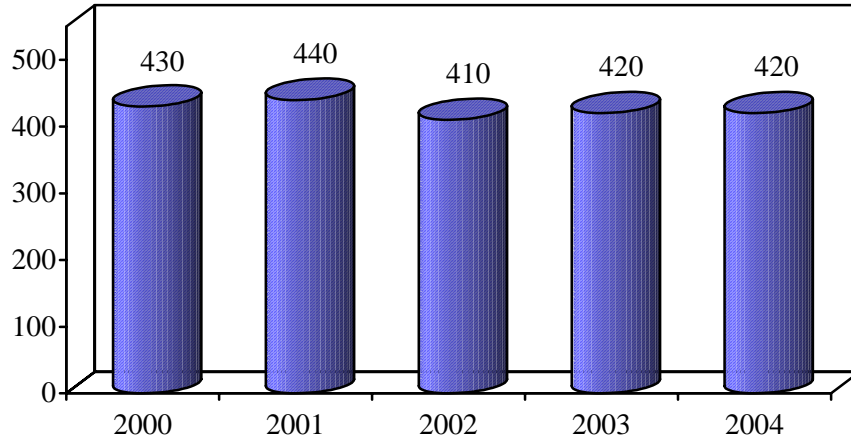
B. Parish Statistics

1. The following graph illustrates the age profile of the parishioners.

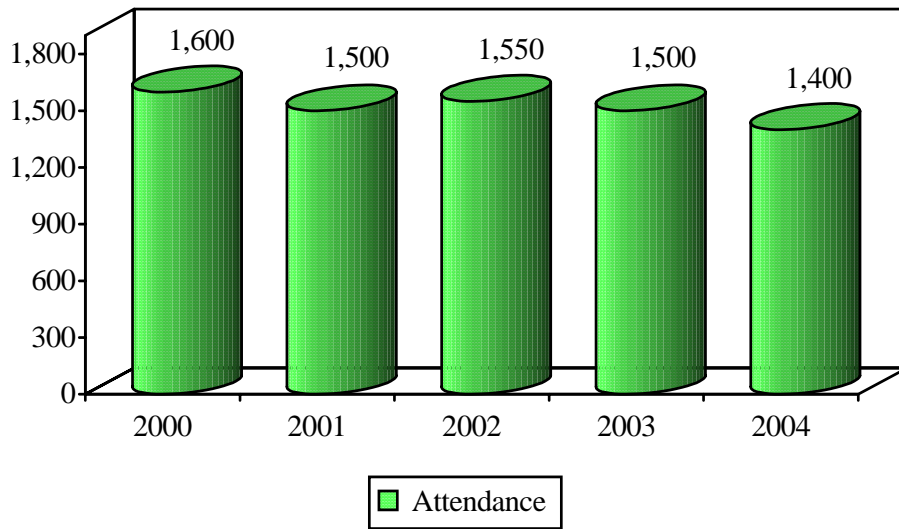


2. Information about Religious Education and Mass attendance for the past five years is reflected in the following graphs:

Religious Education Attendance



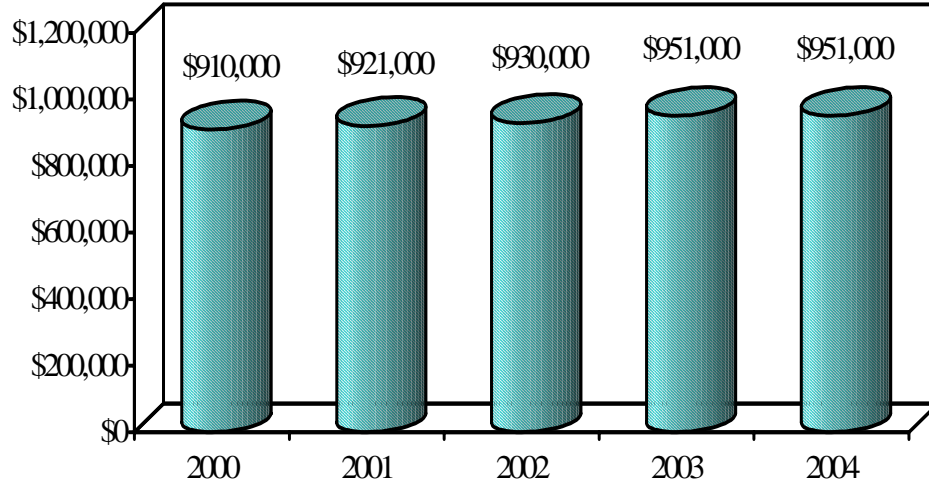
Mass Attendance



C. **Review of Financial Trends**

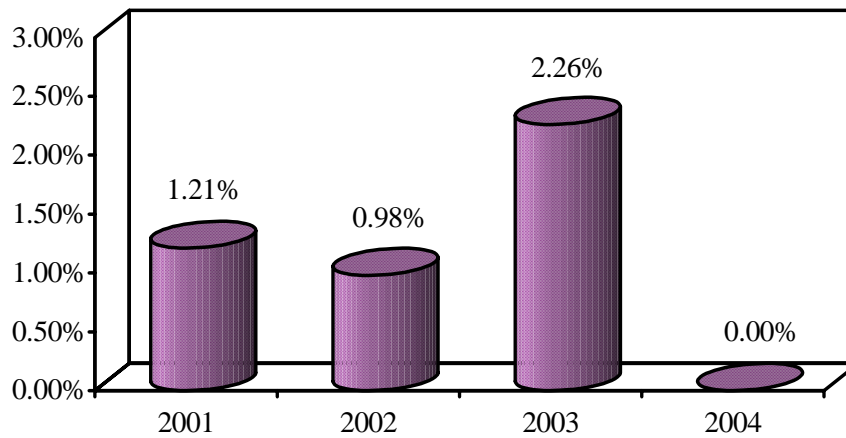
1. Budget giving for the past five years:

Giving Receipts



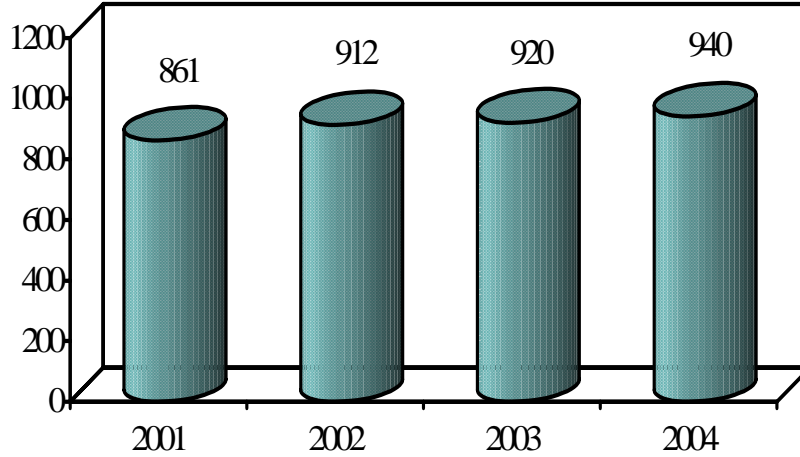
2. Annual percentage increases of budget giving for the past four years:

Percentage Increase



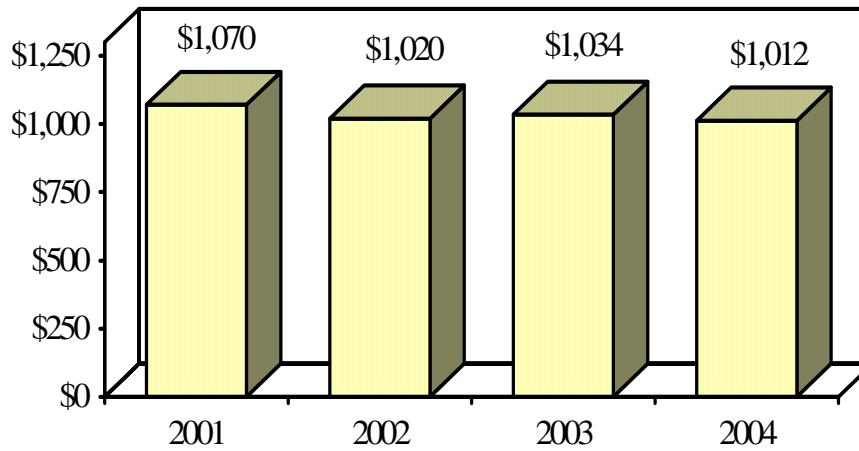
3. Participating giving units for the past four years:

Participating Giving Units



4. Average annual contributions per participating budget giving unit for the past four years: *(Please see the Budget Giving Analysis section for further comment on giving patterns.)*

Average Annual Contributions



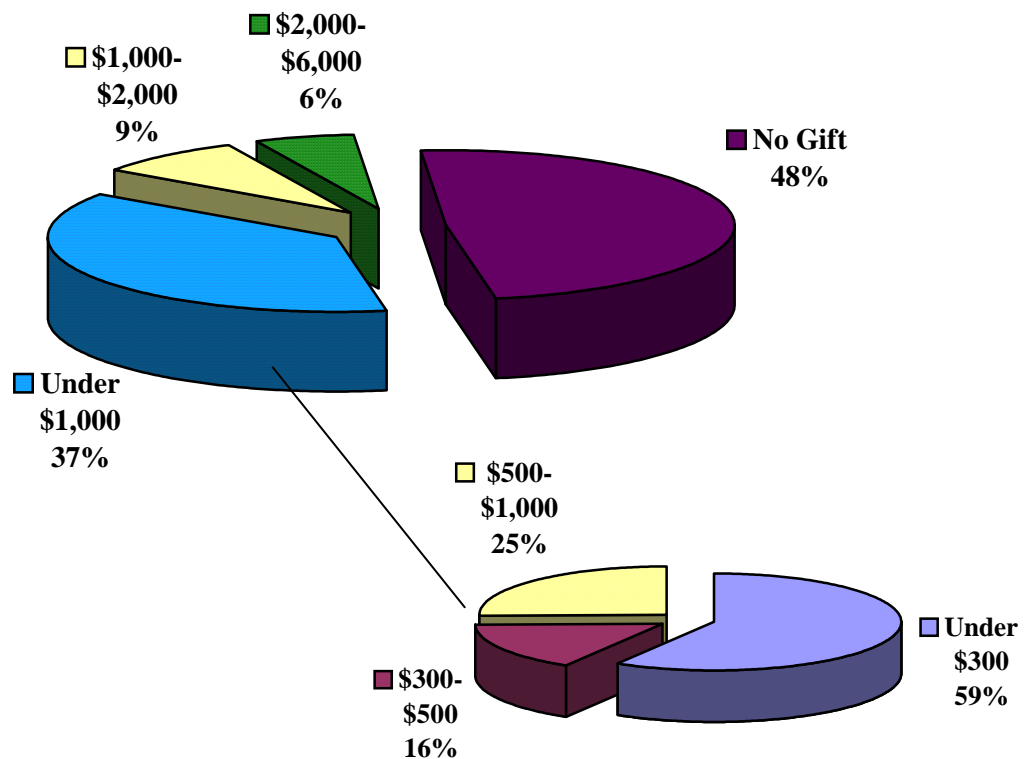
D. Budget Giving Analysis

Analysis of recorded giving units in 2004 shows the following patterns:

- The parish had 1,816 potential giving units.
- Nine hundred forty (940) giving units (52% of potential giving units) participated in giving.
- **Eight hundred seventy-six (876) households (48% of potential giving units) made no registered gift.**
- Six hundred seventy-five (675) giving units (37% of potential giving units) gave less than \$1,000.
- One hundred fifty-four (154) giving units (9% of potential giving units) gave \$1,000 to \$2,000.
- One hundred one (101) giving units (6% of potential giving units) gave \$2,000 to \$6,000.
- Five (5) giving units (0.3% of potential giving units) gave \$6,000 to \$10,000.
- Five (5) giving units (0.3% of potential giving units) gave over \$10,000.

(Percentages less than one will not be shown on the following graph.)

Budget Giving Analysis



II. Determination of Priority and Potential

Sacred Heart of Jesus Parish has approved a program to assess support for raising funds for facility needs. Specific priorities, with an estimated cost of **\$8,622,000**, have been identified. Planning has begun to address these issues. Cargill Associates has been retained to determine the feasibility of this plan.

This plan includes:

- Church Renovation
- School Health and Safety Renovation
- Site and Grounds Improvement
- School Addition

A total of **69** leadership interviews were conducted. For most questions, the response base is **69**, since responses of both spouses were counted when both were interviewed. Questions regarding support and giving have a response base of **42** to represent a giving household unit.

The response base of the parishioner questionnaire phase of the Pre-Campaign Feasibility Study is **223**. Questions regarding support and giving have a response base of **180** to represent a giving household unit.

A total of **222** households responded to the survey. One hundred percent (100%) of interviewed households and 91% of parishioner respondent households are among the **940** households that presently participate in giving.

For both phases of the study, individuals responded to a series of questions concerning parish relationship status, awareness levels, personal involvement, and future parishioner needs. Respondents offered comments to some questions. The comments are summarized by listing the most frequently noted statements. The results from both the parishioner questionnaire and the leadership interviews are published in this report.

III. Compilation of Responses

Leadership Interviews and Parishioner Questionnaires

A. Relationship

1. *Fifty-five percent (38) of those interviewed and forty-three percent (97) of questionnaire respondents have been attending Mass at Sacred Heart of Jesus Parish for 16 years or longer.*

<u>Category</u>	<u>Leadership Interviews</u>	<u>Parishioner Questionnaires</u>
0-5 years	11	52
6-10 years	8	47
11-15 years	12	26
16 years or longer	38	97
No response	<u>0</u>	<u>1</u>
Total	69	223

2. *Eighty-eight percent (61) of those interviewed and sixty-nine percent (153) of questionnaire respondents attend Mass weekly.*

<u>Category</u>	<u>Leadership Interviews</u>	<u>Parishioner Questionnaires</u>
Weekly	61	153
2-3 times a month	5	29
Once a month	2	8
Several times a year	0	21
Rarely, if ever	1	10
No response	<u>0</u>	<u>2</u>
Total	69	223

3. *Thirty-nine percent (27) of those interviewed are between the ages of 60 and 74, and thirty-one percent (70) of questionnaire respondents are between the ages of 45 and 59.*

<u>Category</u>	<u>Leadership Interviews</u>	<u>Parishioner Questionnaires</u>
18 and under	0	1
19-29	0	5
30-44	18	50
45-59	21	70
60-74	27	53
75 and up	3	41
No response	<u>0</u>	<u>3</u>
Total	69	223

B. Perspective

4. *Eighty-six percent (59) of those interviewed and fifty-eight percent (130) of questionnaire respondents indicated feelings of moderately high to very high enthusiasm about the work and programs of Sacred Heart of Jesus Parish.*

<u>Category</u>	<u>Leadership Interviews</u>	<u>Parishioner Questionnaires</u>
Very high enthusiasm	17	22
Moderately high enthusiasm	42	108
Moderately low enthusiasm	8	43
Very low enthusiasm	2	16
No opinion	0	32
No response	<u>0</u>	<u>2</u>
Total	69	223

5. *Fifty-seven percent (39) of those interviewed and forty-five percent (101) of questionnaire respondents indicated the parish communicates well with the parishioners involving events, plans, and programs.*

<u>Category</u>	<u>Leadership Interviews</u>	<u>Parishioner Questionnaires</u>
Very well	24	84
Well	39	101
Not well at all	6	29
No response	<u>0</u>	<u>9</u>
Total	69	223

6. *Forty-three percent (30) of those interviewed indicated Sacred Heart of Jesus Parish meets its current financial obligations with occasional difficulty, and fifty-two percent (115) of questionnaire respondents indicated they do not know how the parish meets its current financial obligations.*

<u>Category</u>	<u>Leadership Interviews</u>	<u>Parishioner Questionnaires</u>
Very well	4	15
With occasional difficulty	30	73
Not well at all	6	15
Does not know	29	115
No response	<u>0</u>	<u>5</u>
Total	69	223

7. *Thirty-nine percent (27) of those interviewed and thirty-four percent (75) of questionnaire respondents indicated adequate information is available about the handling and allocation of parish funds.*

<u>Category</u>	<u>Leadership Interviews</u>	<u>Parishioner Questionnaires</u>
Yes	27	75
Only when asked for	13	35
No	18	51
No opinion	11	57
No response	<u>0</u>	<u>5</u>
Total	69	223

8. *Ninety-three percent (64) of those interviewed and seventy-six percent (170) of questionnaire respondents indicated Sacred Heart of Jesus Parish teaches stewardship as the giving of time, talent, and money.*

<u>Category</u>	<u>Leadership Interviews</u>	<u>Parishioner Questionnaires</u>
Yes	64	170
No	4	14
Does not know	1	36
No response	<u>0</u>	<u>3</u>
Total	69	223

9. *The following are perceived to be the parish's greatest strengths:*

<u>Leadership Interviews</u>	<u>Responses</u>	<u>Parishioner Questionnaires</u>	<u>Responses</u>
Mass	61	Mass	165
SHJ Parish School	61	SHJ Parish School	134
Religious Education	30	Parish Staff	77
Hispanic Ministry	27	Religious Education	73
Parish Staff	23	Music Ministry	53
Youth Programs	20	Missions (i.e. Outreach to the Poor)	48
Missions (i.e. Outreach to the Poor)	14	Youth Programs	44
Music Ministry	10	Hispanic Ministry	42
Building and Facilities	9	Building and Facilities	40
Other	0	Other	8

Other (Parishioner Questionnaire)

- Athletics (2)
- Day Care Center
- Location
- Ministry to Hospitals, Nursing Homes, and Shut-ins (2)
- Parishioners
- Priest

10. *The following are suggested areas, which need to be improved or expanded:*

<u>Leadership Interviews</u>	<u>Responses</u>	<u>Parishioner Questionnaires</u>	<u>Responses</u>
Building and Facilities	56	Building and Facilities	83
SHJ Parish School	27	SHJ Parish School	66
Music Ministry	21	Music Ministry	48
Youth Programs	21	Missions (i.e. Outreach to the Poor)	33
Missions (i.e. Outreach to the Poor)	16	Youth Programs	31
Other	8	Mass	24
Mass	6	Religious Education	24
Parish Staff	6	Parish Staff	22
Religious Education	3	Hispanic Ministry	15
Hispanic Ministry	1	Other	13

Other (Leadership Questionnaire)

- Adult Education
- Community Outreach and Awareness
- Parking (2)
- School Playground, Community Awareness
- Small Group Ministries, Senior Programs
- Tabernacle
- We Need Another Priest

Other (Parishioner Questionnaire)

- A CEO in Charge of the Business End; Senior Citizens
- Adult Educational Offerings in the Evenings, Bible Study, etc.
- Adult Religious Education (3)
- Elder Programs
- Lectors at Mass, Too Much Dramatic Reading
- Outreach to Homebound and Seniors
- Outreach to New Parishioners and Those Who are Ill
- Parking

- School Volunteers, Staff, School Playground
- Single Adult Programs
- Use Organ

11. Priority Need

Ninety-six percent (66) of those interviewed and seventy-two percent (160) of questionnaire respondents ranked the funding needs. Individuals ranked the priorities being considered according to their perception of the parish's needs.

Leadership Interviews

Parishioner Questionnaires

<u>Rank</u>	<u>Average Ranking</u>		<u>Rank</u>	<u>Average Ranking</u>
1	1.68	School Health and Safety Renovation	1	1.60
2	2.39	Church Renovation	2	2.71
3	2.59	Site and Grounds Improvement	3	2.74
4	3.33	School Addition	4	2.95

Average Ranking (weighted average) of all Respondents:

<u>Rank</u>	<u>Average Ranking</u>	
1	1.62	School Health and Safety Renovation
2	2.62	Church Renovation
3	2.70	Site and Grounds Improvement
4	3.06	School Addition

Cargill Associates tested for an overall funding need of \$2,000,000 to \$8,000,000 in a three-year Capital Stewardship Program above giving to the annual offertory.

12. *Sixty-two percent (43) of those interviewed and fifty-five percent (123) of questionnaire respondents considered \$2,000,000 to \$4,000,000 to be attainable.*

<u>Category</u>	<u>Leadership Interviews</u>	<u>Parishioner Questionnaires</u>
\$6,000,000 to \$8,000,000	0	8
\$4,000,000 to \$6,000,000	18	34
\$2,000,000 to \$4,000,000	43	123
No response	<u>8</u>	<u>58</u>
Total	69	223

C. **Support**

TO AVOID DUPLICATE RESPONSES, ONLY ONE RESPONSE PER FAMILY WAS GIVEN FOR THE FOLLOWING QUESTIONS - 13 THRU 19:

Forty-two (42) households are represented in the following Leadership Interview responses. **One hundred eighty (180)** households are represented in the following Parishioner Questionnaire responses.

13. *One hundred percent (42) of those interviewed and ninety-one percent (163) of questionnaire respondents participate in the financial support of Sacred Heart of Jesus Parish.*

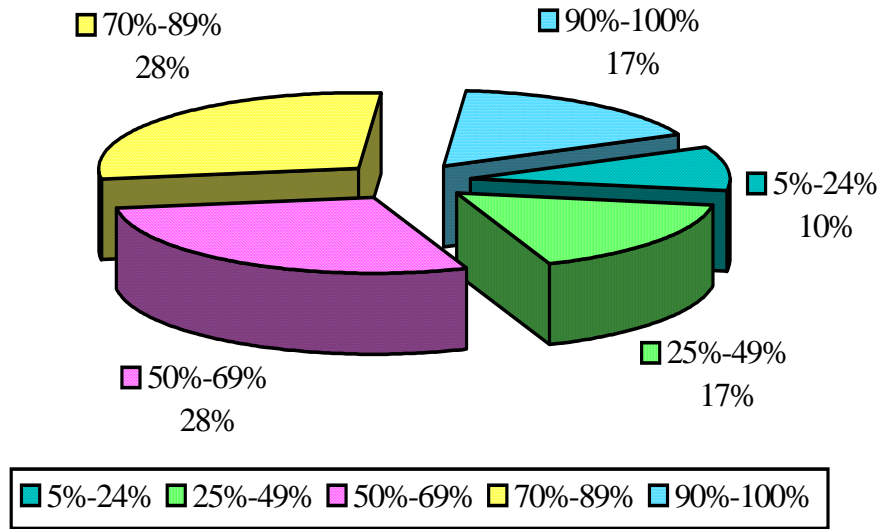
<u>Category</u>	<u>Leadership Interviews</u>	<u>Parishioner Questionnaires</u>
Yes	42	163
No	0	13
No response	<u>0</u>	<u>4</u>
Total	42	180

14. *Thirty-eight percent (16) of those interviewed indicated giving decisions are based on a percentage of household income and forty-two percent (76) of questionnaire respondents indicated giving decisions are based on what is affordable.*

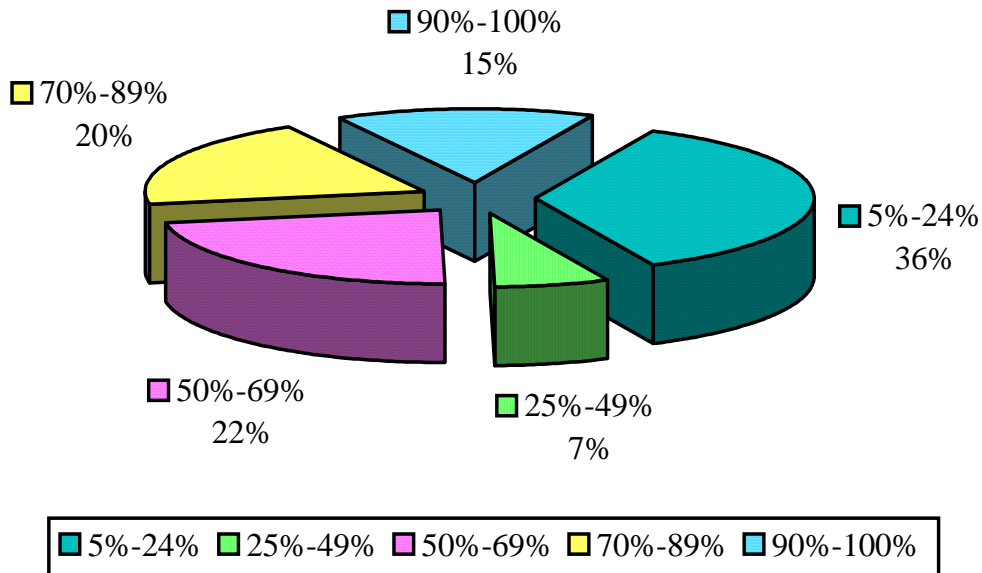
<u>Category</u>	<u>Leadership Interviews</u>	<u>Parishioner Questionnaires</u>
10% or more of income	7	15
A percentage of income	16	20
A dollar amount	13	58
What they can afford	6	76
No response	<u>0</u>	<u>11</u>
Total	42	180

15. Each household was asked to estimate what percentage of total giving to charitable causes was directed to Sacred Heart of Jesus Parish. The following reflects estimated percentages:

Leadership Interviews



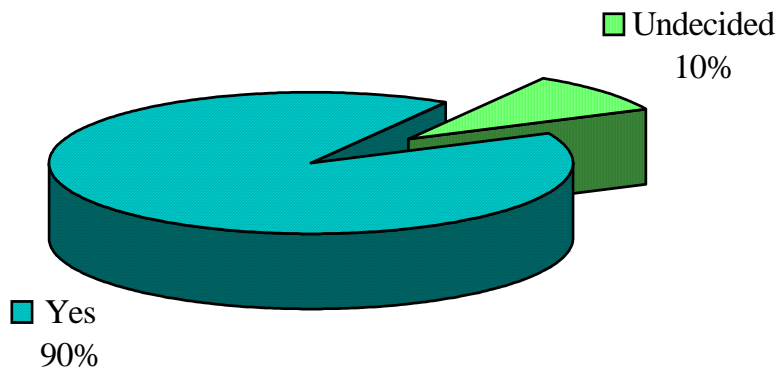
Parishioner Questionnaires



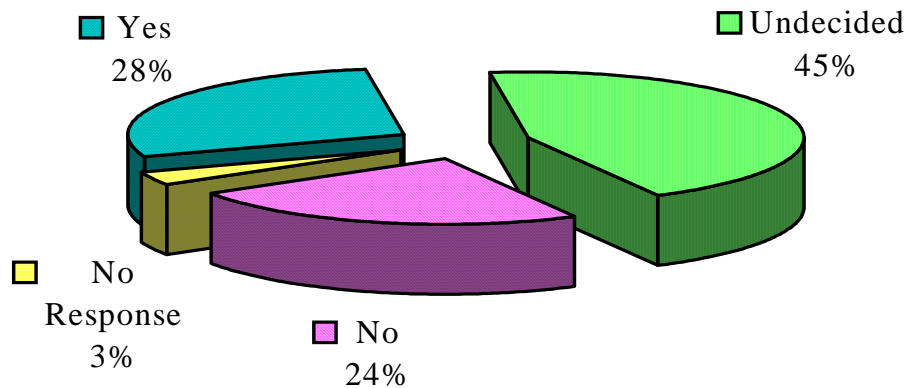
16. Ninety percent (38) of those interviewed and twenty-eight percent (51) of questionnaire respondents will consider a personal gift to support a Capital Stewardship Program by means of a three-year commitment above giving to the annual budget. Ten percent (4) of those interviewed and forty-five percent (80) of questionnaire respondents are undecided at this time.

<u>Category</u>	<u>Leadership Interviews</u>	<u>Parishioner Questionnaires</u>
Yes	38	51
No	0	43
Undecided	4	80
No response	<u>0</u>	<u>6</u>
Total	42	180

Leadership Interviews



Parishioner Questionnaires



17. Twenty-nine percent (12) of those interviewed and two percent (3) of

questionnaire respondents expressed an interest in other methods of giving, such as non-cash gifts-in-kind, stocks or bonds, real estate, life insurance policies, charitable trusts, etc.

<u>Category</u>	<u>Leadership Interviews</u>	<u>Parishioner Questionnaires</u>
Yes	12	3
No	27	127
Undecided	3	39
No response	<u>0</u>	<u>11</u>
Total	42	180

18. Three-Year Giving Responses

Each household was given an opportunity to respond to questions regarding personal financial potential in relation to the proposed Capital Stewardship Program. These responses do not include participants who indicated they were undecided about contributing to a Capital Stewardship Program.

Leadership Interviews:

The following reflects self-perceived gift responses totaling \$495,600.

	<u>Responses</u>
\$75,000	1
\$50,000	1
\$35,000	1
\$30,000	1
\$25,000	3
\$20,000	1
\$15,000	4
\$10,000	13
\$6,000	2
\$3,600	1
\$3,000	1
\$2,000	<u>1</u>
Total	30

DNI: Eight respondents indicated they would make a gift but Did Not Indicate an amount.

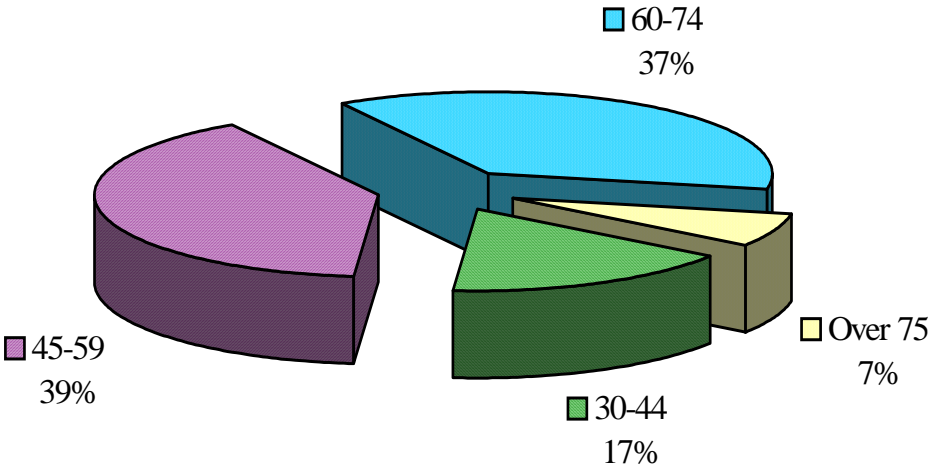
Parishioner Questionnaires:

The following 45 self-perceived gift responses represent \$116,260 in gifts. Signed questionnaires accounted for \$109,760 of that total. Unsigned questionnaires totaled \$6,500.

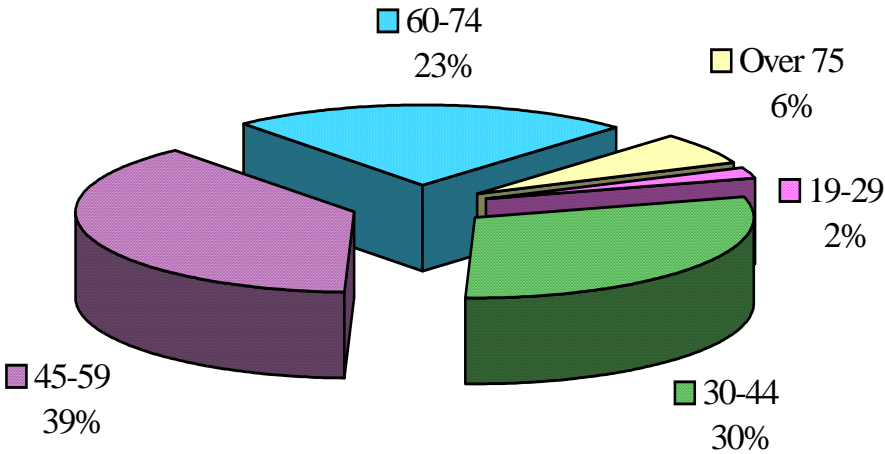
	<u>Signed Responses</u>	<u>Unsigned Responses</u>	<u>Total</u>
\$15,000	1	0	1
\$5,000	7	1	8
\$3,000	13	0	13
\$2,000	1	0	1
\$1,800	3	0	3
\$1,500	3	1	4
\$1,200	1	0	1
\$1,000	3	0	3
Less than \$1,000	<u>11</u>	<u>0</u>	<u>11</u>
Total	43	2	45

DNI: Six respondents indicated they would make a gift but Did Not Indicate an amount.

Of the **30** interviewees who indicated gift amounts totaling **\$495,600**, the percentages of pledge amounts by age groups are listed as follows:



Of the **45** questionnaire respondents who indicated gift amounts totaling **\$116,260**, the percentages of pledge amounts by age groups are listed as follows:



19. *Twenty-six percent (11) of those interviewed and four percent (8) of questionnaire respondents will consider placing the parish in their will.*

Five percent (2) of those interviewed and three percent (5) of questionnaire respondents have made that provision.

<u>Category</u>	<u>Leadership Interviews</u>	<u>Parishioner Questionnaires</u>
Yes	11	8
No	14	96
Included	2	5
Undecided	14	62
No response	<u>1</u>	<u>9</u>
Total	42	180

D. Leadership

Individuals were asked to suggest volunteers they would trust to give direction to a Capital Stewardship Program. Leadership respondents offered the names of **47** people. Questionnaire respondents offered the names of **46** people.

E. Comments heard from those interviewed include:

- I want the things we do to be absolutely necessary and not window dressing.
- We need more financial data. The Vision Statement needs more specifics about the project. We need envelopes for people to put their second collections in, and an announcement ahead of time.
- We really think the school is important!
- There is a marketing value to the school as far as gaining new parishioners.
- Parish is great, very accepting.
- We love our parish and our pastor. Homilies are wonderful and so is the music. We are moving in the right direction. It is very difficult to reach the staff; they have limited hours and could be more accessible. Parking is very difficult; there are only a few handicapped spots. We must provide better parking.
- Father Bill is great. He has really changed the way we feel about the parish.
- We need to spend money on the infrastructure of the school, people and programs. We need a balance of adequate facilities and outreach programs.
- We are concerned about the long-term viability of the school.
- Parking is very important. We don't want church renovations that go beyond necessary maintenance. We have some large cracks in the brick that need to be taken care of; we can't ignore needed maintenance.
- I would like to see quarterly statements indicating our income vs. expenses.
- We need more specifics about the church renovations.
- Father Bill has been unifying and has done wonderful things.
- The parish shouldn't be spending money on itself but on the poor.
- I prefer a more traditional choir organ.
- Our declining school is requiring more and more money. The school and Hispanic ministry are very expensive and the giving is flat from them. Parking and grounds are the top issues. We need to look for donated goods and services.
- Father Breslin is great. The school is too white. The school is becoming too much of a rich, white school.

Comments indicated in Parishioner Questionnaires include:

- Try to do the smallest, most important stuff first. Thanks.
- We'd be very interested in sending our three children to the school, but the facilities are poor and depressing. Sunday School should be concurrent with Mass.
- We have been parishioners for twenty-five years. Our four children all graduated from SHJ School. The school is the heart of the parish as far as we have been concerned. During the years our children attended (1980 – 1992), the biggest problems were those involving the boilers (school and church) and the air-conditioning. The replacement of all this equipment probably would cost \$1,000,000 alone. Connecting the two school buildings would be nice, but not necessary, and no more than \$200,000 should be spent. The church is beautiful; the parking might be a problem, but it's not as important as having the shade trees around the school buildings! The parking/garage plan would never pass neighborhood approval in Boulder!!
- Our church is attractive, efficient and practical, upkeep, of course is mandatory, but why would anyone enlarge or change its design?
- Based on budget shortfalls in the past, this \$8,622,000 project is unrealistic.
- I am not involved in the business aspect of Sacred Heart Church and School.
- Father needs to attend to the spiritual end, and hire a CEO to deal with funds, insurance, etc. for the business end of the church/school.
- I am against tithing which started in this parish a few years ago; it is important to give of one's own accord. I also feel the church has lost touch with its people. It's hard line on priests not marrying and the very tepid response to pastoral abuse of children sexually, leaves much to be desired. Finally, I am questioning my continued participation; not my belief in God but in the Catholic Church as its venue for my faith.
- Do only what is necessary, as we would in our own homes. Times are tough financially for a majority of people and big obligations should not even be requested or asked for from people who are striving to keep jobs, make payments on homes, cars, food and clothing. Many live on imagination, elderly on fixed incomes specifically. Some look at what we have and see a hovel, most look and see a mansion. Let's remember, it's what's in our heart that counts, not a shining facade we show off from inside a warped view of the world. I know not all do that, but consider carefully what is needed versus what is desired.
- Do the necessary things first before making other changes. Relocate the Tabernacle to the proper location.
- Sacred Heart of Jesus School should be the top priority of the parish. It is the future of the parish! If the school grows and improves the parish will thrive; if SHJ doesn't take care of the school the future of the parish is bleak. Phase One should be school health and safety, not church renovation!

- We lack the information to know what building issues are at risk. Safety and health issues, whatever they may be, needs to be addressed.
- Being 84 years old, I do not think I qualify in making decisions for the future plans of our parish. My income is very limited.
- We have plans to change our residence and the possibility of having to change parishes.
- Having lived in Boulder since 1958 and being in the parish since the "new church" was built in 1963, we do not feel it is old and outdated. Its beauty still exists today with its architectural symbolism and liturgical meanings that enhance our worship. Maintenance needs should be funded from the annual budget by reserving some of the funds received for future major replacements such as sound systems, heating, ventilation, etc.
- Much of the available talent in the city is not being tapped. CU has a great music department and should be given the opportunity to have their students use our parish for internship, especially in choir, both adult and youth. The church services need more energy. This should not increase the church's financial burden. All parish children could be trained to sing praise during the liturgy of the word. The basement is available and if there were classes for all ages, especially to have choir practice, then the adults could hear the liturgy and then the kids could sing. Music is a form of worship and we should use it to keep everyone interested in the Mass and want to come back. We need volume and energy, not singing in parts. There is lively music for all occasions, even funerals, that we should be singing so people could participate.
- The church is beautiful; restore it only.
- This church's only mission and priority should be the school. You will not be successful otherwise. We are quite frustrated with the lack of focus and priority at SHJ for the school. This is also why the school's enrollment continues to decline. Other parishes should focus on the homeless, the aging and the Hispanics.
- School safety, school ground, expansion of the playground and the school boiler system should come first. These are our children of whom we need to take precious care.
- The church looks great as it is. It is not necessary to build a bigger and fancier church. Spend whatever money you raise on the school. Get volunteers to improve the grounds.
- The school facilities should be the top priority in any capital program. The replacement of the boiler, bringing the school into compliance with current building codes, installation of air conditioning, and installation of artificial turf on the dirt playground are higher priorities than "enhancing the liturgical experience of the community." Three hundred students use the building approximately 200 days a year. The church is only filled to capacity two days a year, Easter and Christmas Eve services! The focus of the capital program should be on pragmatic projects, not cosmetic improvements.
- Our financing decision, both "if" and "how much", would be based solely on the use

of funds. I would need more detailed information before making a commitment.

- I would like quarterly expense information (not detailed). It would also be nice to have actual needs enumerated (i.e., boiler, asbestos, etc.).
- Keep the statues and stained glass windows in the new church. Keep the tabernacle with the main church seating area like it is now.
- My primary wish is to have the tabernacle holding the Blessed Sacrament moved from its current location by the west transept to the center of the sanctuary behind the altar where it will have a very prominent location.
- I am retired and I'm trying my best to do what I can and not go into debt.
- In our opinion, do one project at a time, and then work on another one. That way the money raised could be for one thing at a time. That is how we do it at home; maybe it would be better to look at the list that way, too. We do not know any people of the parish. We see faces and smile. Sue, who is partly running the poor people on Tuesday, is quite trustworthy. But, we don't know her last name.
- I know some things need to be replaced, such as heating and air conditioning for both the school and church. I don't think the grounds interfere with my spiritual life. I'm on Social Security and am helping a son who has major medical problems with no insurance and can't qualify for any. He needs what help I give him.
- I'm sorry I am unable to financially contribute for all the things that are needed for redoing all that's necessary. I will be able to still give my monthly contribution though.
- This is a long awaited project. With the renovation of the church, parking needs to be considered. With the invitation to Mass and other church functions, more parking is essential! With inadequate parking, attendance is negatively affected.
- I think that the primary reason for decline in enrollment is due to location. Families are leaving Boulder and locating in the eastern part of the county. A long-term strategy should be to relocate the school to the eastern part of the county. Eight million dollars would build a nice new school and possibly provide an endowment for teachers.

IV. Observations

Programs and Ministries

- ◆ Sixty-five percent (65%) of respondents indicated feelings of moderately high to very high enthusiasm about the work and programs of Sacred Heart of Jesus Parish.
- ◆ Forty-eight percent (48%) of respondents indicated the parish communicates well with the parishioners involving events, plans, and programs.
- ◆ *Mass, SHJ Parish School and Religious Education* were ranked by interviewees as the parish's greatest strengths, and *Mass, SHJ Parish School and Parish Staff* were ranked by questionnaire respondents as the parish's greatest strengths.
- ◆ Respondents indicated *Building and Facilities, SHJ Parish School and Music Ministry* as areas in most need of improvement and/or expansion.

Giving

- ◆ Seventy-two percent (72%) of participating households give less than \$1,000 annually. This is a spiritual issue that needs to be addressed. Stewardship education is needed and desired.
- ◆ The average annual gift per contributing household of Sacred Heart of Jesus Parish is \$1,012. The parish needs to be taught Christian stewardship. The average gift needs to reflect a \$1,500 average or better.
- ◆ Thirty-eight percent (38%) of those interviewed indicated their giving decisions are based on a percentage of household income. The largest percentage (42%) of parishioner respondents indicated their giving decisions are based on what is affordable. 'What we can afford' is not a Biblical principle of financial stewardship.
- ◆ Forty-nine percent (49%) of respondents indicated they do not know how Sacred Heart of Jesus Parish meets its current financial obligations, and 35% indicated the parish meets its current financial obligations with occasional difficulty. This can be solved by parishioners increasing their annual giving.

- ◆ Thirty-five percent (35%) of respondents indicated adequate information is available about the handling and allocation of parish funds, and 24% states it is not.

Facility Expansion/Improvement

- ◆ Seventy-seven percent (77%) of respondents ranked the facility needs. *School Health and Safety Renovation* (1.92) was identified as the first priority by respondents and *Church Renovation* (2.62) was identified as the second priority.
- ◆ Based on the present size and giving patterns of Sacred Heart of Jesus Parish, a project in the \$8,622,000 range is too large and needs to be scaled back.
- ◆ A project in the \$3,700,000 can be managed if parish leadership is willing to create a line item in the 2006 annual operating budget. This line item will need to be grown over the next three years to manage residual debt from the project.
- ◆ A project larger than \$3,700,000 would require a second three-year capital campaign to follow the first campaign. Money would be raised over six years instead of three.

Capital Stewardship Program

- ◆ Fifty-seven percent (57%) of respondents considered \$2,000,000 to \$4,000,000 to be attainable in a three-year Capital Stewardship Program.
- ◆ Ninety percent (90%) of those interviewed and 28% of the questionnaire respondents will consider a personal gift to support a three-year commitment above their regular giving to the annual budget. Thirty-eight percent (38%) of respondents indicated they are undecided at this time.
- ◆ Self-perceived gifts totaling \$611,860 were discovered from 75 households, representing approximately 8% of the 940 households that presently participate in annual giving.

V. Recommendations

- A. In light of the Pre-Campaign Feasibility Study, Cargill Associates recommends that Sacred Heart of Jesus Parish proceed with plans for a Capital Stewardship Program. The schedule should be **July 2005** to **December 2005**.
1. Cargill Associates recommends that the project involve school health and safety renovations and church renovations.
 2. Cargill Associates recommends that the project not exceed **\$3,700,000**.
 3. The campaign should center on raising the maximum dollars for the project between **July 2005** and **December 2005**. In **December 2005**, based on the strength of the stewardship program, charge the Building Committee to work with their architect and finance institution to devise a building and financing plan for leadership's approval by **Spring of 2006**. This approach takes the guesswork out of the plan and creates an environment where you build what the parish can afford.
 4. The campaign should include raising both the three-year capital funds and annual offertory for **2006** simultaneously.
 5. We find an increase of **\$95,100** to **\$142,650** to be a reasonable expectancy for annual offertory giving in **2006**. This expectancy is based on Cargill Associates' track record of a **10 to 15 percent** increase in annual operating giving when a combination campaign is conducted.
 6. We find a reasonable expectancy of **\$2,350,000** to **\$2,750,000** for the capital project. This expectancy is based on the **\$495,600** identified among **30** of the **42** participant households in the leadership interviews, and the **\$116,260** identified by **45** of the **180** respondents in the parishioner survey. The above participating households include only the households that indicated a gift amount. *Though a campaign could yield more or less than the reasonable expectancy, this is a conservative projection based on the combined responses of members to the perceived needs of the parish. Our experience indicates capital giving receipts would follow this customary pattern:*

First Year	40-45%
Second Year	30-35%
Third Year	20-30%

- B.** A Capital Stewardship Program adhering to Cargill Associates counsel will produce the following:
1. A clear *vision* of the parish's future mission ministry based upon the discerned will of God.
 2. *Ownership* in the parish's vision by a large number of the parish's membership.
 3. Increased *involvement* by a greater number of members in the development and support of the parish's vision.
 4. Motivation of members to grow in their level of *stewardship commitments*.
 5. Encouragement of members to make the most generous, pacesetting *expression* of their commitments to the parish's vision.
 6. A disciplined *follow-up*, which will enable the parish to achieve all that is committed in the campaign.
- C.** Parish leadership will need to continue developing an aggressive information flow to members.
- D.** We recommend that Sacred Heart of Jesus Parish prepare and mail statements of giving to all resident households on a quarterly basis. Currently, the parish provides giving statements annually. Such a practice serves as a reminder of giving needs and stimulates greater participation.
- E.** We recommend that Sacred Heart of Jesus Parish make offering envelopes available on a monthly or bimonthly basis. Currently, they are distributed quarterly. Such a service can increase the giving level for all causes dramatically.
- F.** Sacred Heart of Jesus Parish needs to aggressively promote stewardship among all members, especially for those not regularly supporting the parish. Newer members usually have a two-year "lag" time before they become fully involved in supporting the parish. Stewardship promotion will speed up this process for newer members and create a broader giving base in the parishioners.
- G.** During the capital giving period, a consistent, aggressive program of budget growth is essential. Following the campaign, Cargill Associates would be delighted to show how other parishes have established effective, long-range plans to create larger budget-giving bases.

The response of those participating in the Pre-Campaign Feasibility Study was supportive and helpful. The Cargill Associates representatives were graciously received by those interviewed.

The staff of Cargill Associates wishes to express appreciation to the individuals of Sacred Heart of Jesus Parish who gave counsel and assistance in assembling necessary information in preparation for the Pre-Campaign Feasibility Study.