



Core

CAPITAL
CAMPAIGNS

Feasibility Study Report

St. Lawrence Episcopal Church
Libertyville, IL
2024



July 8, 2024

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

A special word of thanks goes out to The Rev. Kristin Saylor, Julia Karnstedt, Janet Chickey, Andrea P. Larson, Brian Coninx, and Susie Brock for reviewing the case statement, coordinating the personal interviews and preparing emails and 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 56 units participated in the survey; eight interviews were conducted, and 48 responded to the online survey. This represents a total response rate of 57% 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. Core Capital Campaigns welcomes the opportunity to provide further assistance.

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I. Tentative Case Statement	

Executive Summary

Leslie Pendleton began working with St Lawrence in January 2024. In the Fall of 2023, the church's Capital Campaign Committee held listening sessions with members of St. Lawrence. The results of these meetings was shared with the congregation and shared again at the 2024 annual meeting in January with additional discussion time.

By April 2024, leadership was ready to embark on a formal feasibility study to further assess the congregation's readiness for a capital campaign to raise up to \$850,000 for building needs, additional staffing and endowment. Members of St. Lawrence were surveyed through a Feasibility Study in early June.

All families of the parish (98) were invited to participate in the feasibility study, and 56 or 57% responded to the survey via personal interviews led by Leslie Pendleton, direct mail, and electronic emailed survey. This is an excellent representative involvement from the parish community and indicates an excellent communications effort.

Responses indicate 98% support among the respondents for conducting a capital campaign, although some have reservations. Only one responded "no" to conducting a campaign. Study results indicate that 85% of respondents would contribute to a campaign at this time. Of the 56 responses, 42 indicated a range of possible giving over a 3-year period. Only two said they would not give.

By using the ranges of estimated gifts indicated and applying a formula which takes into account as yet unidentified gifts, as well as other relevant factors noted in the responses, we recommend that St. Lawrence conduct a capital campaign to raise at least \$535,000, and a specific challenge goal if the goal is exceeded.

The repeated positive comments are in favor of conducting a campaign are:

- Committed, engaged parishioners, enthusiastic about the future and growth
- Strong leadership and trusted lay leaders

The repeated concerns are:

- General concern over the financial capacity of parishioners
- Economy and possible recession.

All of the comments provided by respondents are included in their entirety in the following report. The unattributed comments should be read thoroughly to obtain a complete understanding of all views expressed in the Study. This will prove very helpful to the leadership and members of the congregation as decisions are made about final project plans and moving forward with a campaign.

Section One of this Report provides background on our Feasibility Study methodology and offers more detailed conclusions and recommendations flowing from the results of the Study.

Section One:

Conclusions, Recommendations, and Methodology

I. Introduction

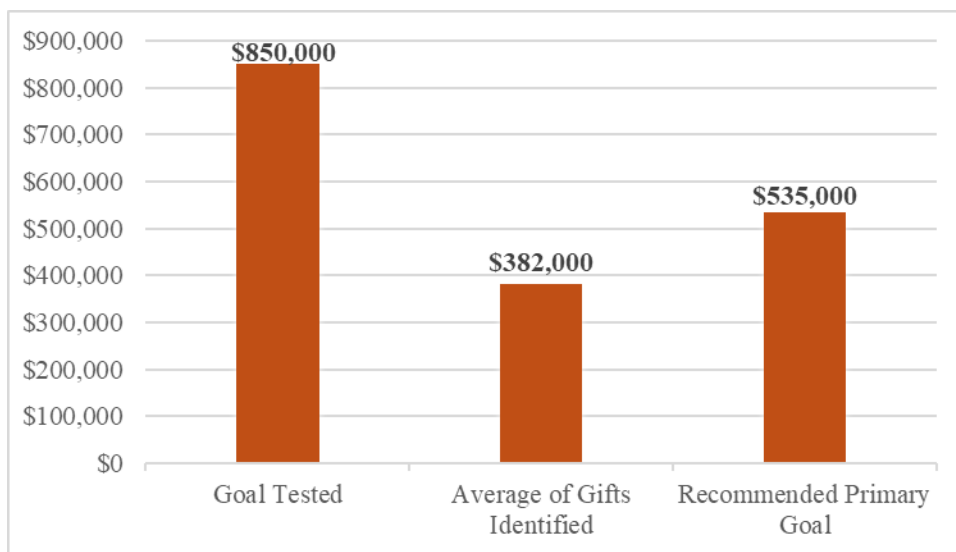
For some time, the leadership of St. Lawrence Episcopal Church, Libertyville, IL, has been evaluating the parish's programs, facilities, and resources, and assessing the capital needs of the church. After much study and the involvement of many people, the Vestry authorized Pendleton Consulting to conduct a 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

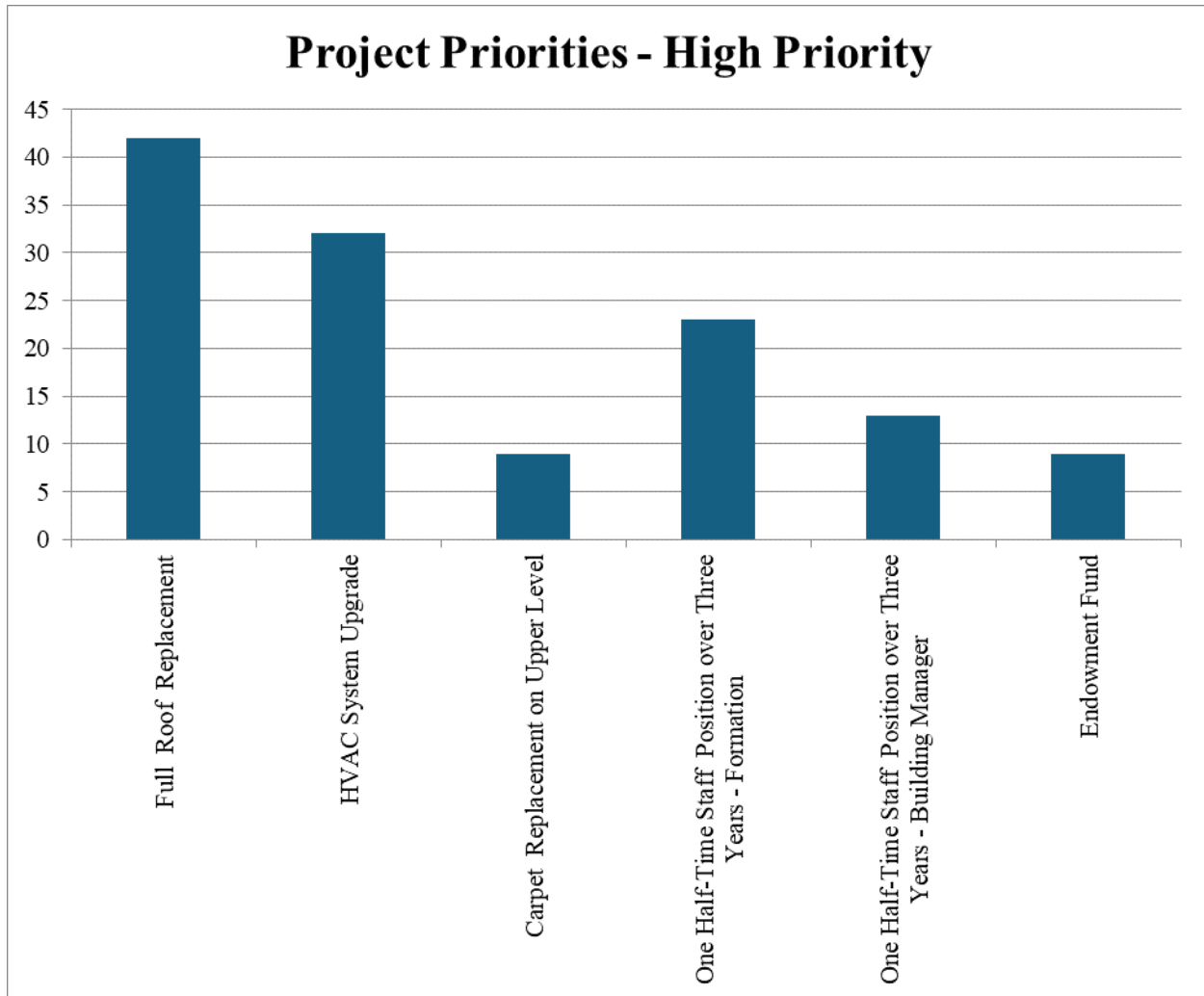
Gift Potential

Experience tells us we can take the average between the low estimate (\$245,000) and the high estimate (\$519,000) 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, \$382,000, when multiplied by this factor (1.4) reveals a suggested goal of \$535,000. 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

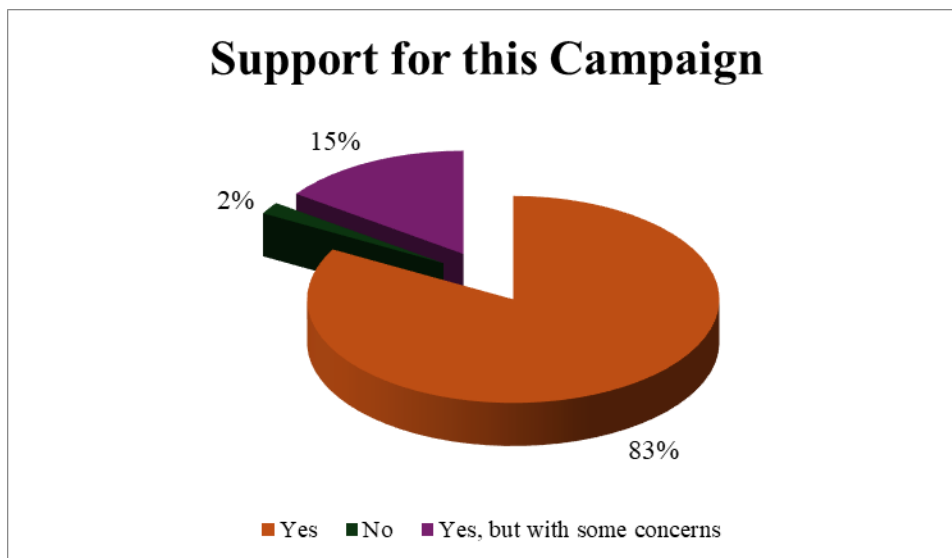
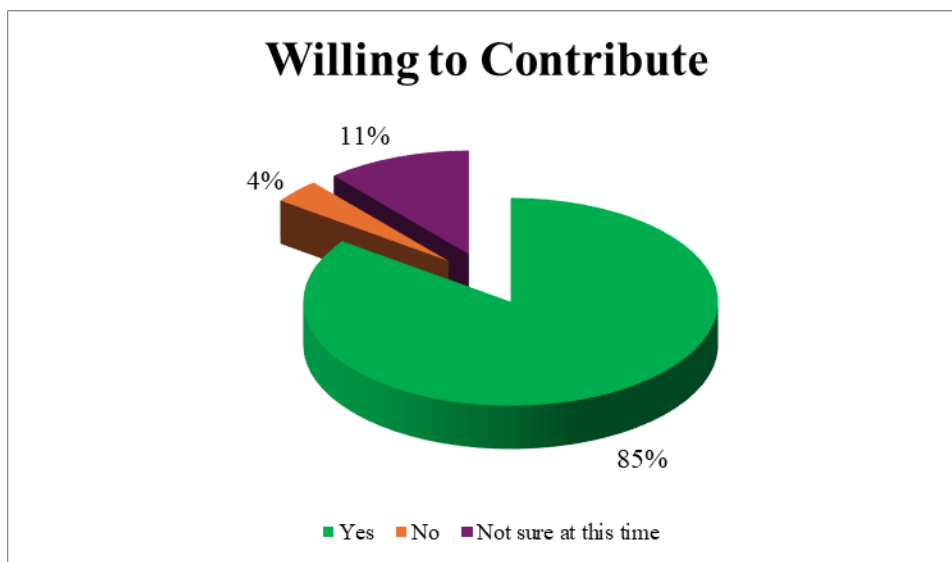
A majority of respondents (89%) were aware that St. Lawrence Episcopal Church is considering a possible campaign, and 89% were also aware of some or all of the proposed plans. Of course, not all the items received the same degree of support. Present awareness of need is a positive; however, each project 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

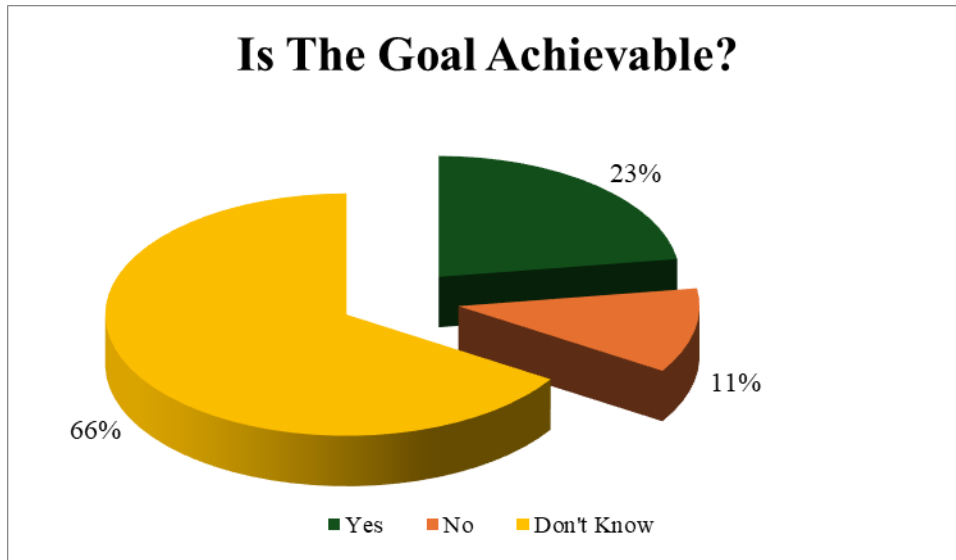
There is significant indication of support for the proposed campaign, but also signs that suggest caution. Positive signs from respondents include:

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

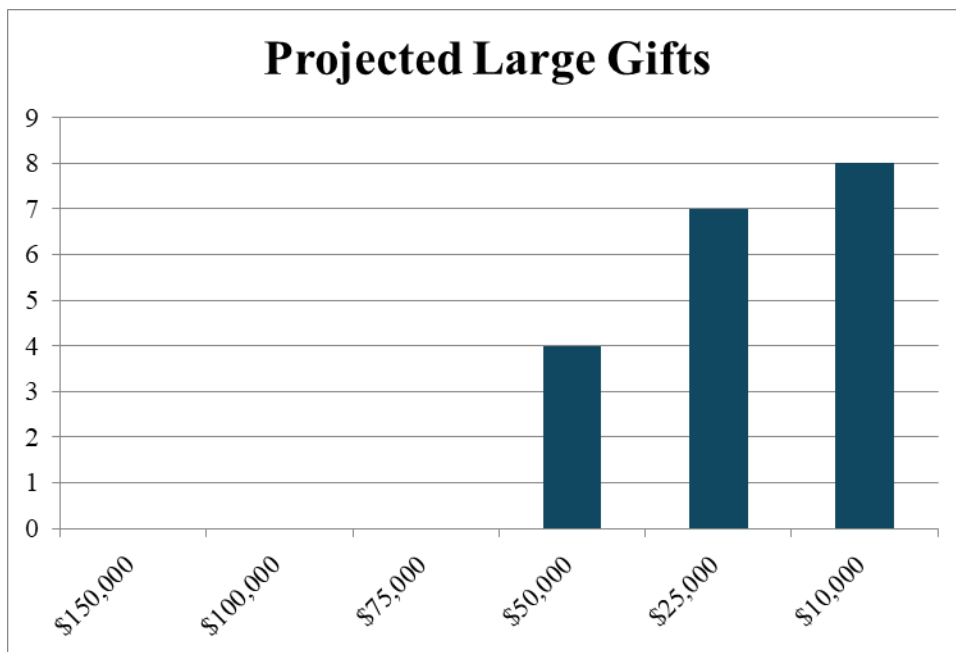


Concerns

1. Approximately 23% of respondents feel the goal is reachable. Eleven percent feel it is too high. The remaining 66% had no opinion on whether this goal can be achieved. This is an indication that the proposed goal is too high.



2. No major gifts were identified, and too few larger gifts were reported at this early date to allow a goal of \$850,000 to be fully embraced.



Influential Leadership

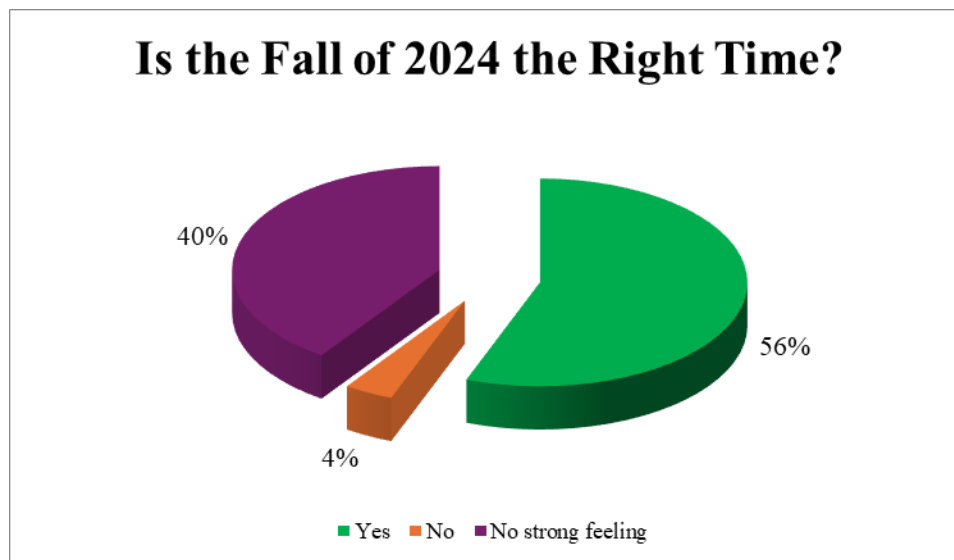
Strong leadership—both financial and volunteer—is absolutely essential for the success of any campaign. A leadership core is presently in place. It is the challenge of this leadership group to expand involvement within the parish, including other individuals who may have significant giving potential.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

Planned Giving

A few people requested planned giving information, and three 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 \$535,000 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 Core Capital Campaigns would be followed.

Recognizing that immediate needs are greater than what is revealed in the Study, leadership may wish to consider \$535,000 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 list of those who have remembered the church in their estate plans should be used to build on a planned giving program. Core Capital Campaigns will guide this work in the next phase.

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 eight interviews were ultimately conducted by Leslie Pendleton of Pendleton Consulting.

Phase III

An online survey was sent to 90 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 90 online surveys were sent to the parish community.
- ♦ Of those, 48 were returned: an online response rate of 53%.
- ♦ Including the eight who were interviewed, 98 units were exposed to the study. Of those, a total of 56 units or 57% 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, 40% attend worship services one or more time(s) per week. Another 36% attend two to three times per month.
- ♦ Regarding the financial-giving practices of those who responded, the majority, 84%, are regular contributors with a written annual pledge.
- ♦ In importance of charitable donations, St. Lawrence ranks as the most important charity that respondents donate to, with 47% rating it as such. Another 44% 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. Lawrence 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
Online Responses**

Results from 8 Personal Interviews, and 48 Online Responses **Total of 56 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?**

49 Yes 6 No

Eighty-nine percent were aware that St. Lawrence 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?**

34 Aware 6 Not Aware 15 Aware of some of the needs

Sixty-two percent of the respondents were aware of the capital needs of St. Lawrence Episcopal Church. Another 27% were aware of some of the needs. Eleven percent were not aware of the needs. This is an indication that the leadership has involved many people in the decision-making process so far and has succeeded in communicating the needs to almost the entire congregation.

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

Comments:

Stained glass and windows.

Additional clergy to help Kristin.

The windows. There are a lot of historical grants available.

Upgraded system for Zoom in church, hiding the wires.

Wonder whether we should hire a curate or vicar in place of a formation specialist, who can fill in for the rector for occasional worship responsibilities and supplement the rector with pastoral care.

Long-term paid professional singer(s), and an assistant rector.

The stained-glass windows in the narthex need to be refurbished. Is this part of current plans?

Assistant clergy.

Fixing both of the stained-glass windows in the Narthex.

The music program is most important to me. The choir has been decimated and is severely limited in potential repertoire. We need a few paid singers at every service where the choir sings (not just at Christmas) until we're able to recruit more volunteer singers. Music is an important part of the worship experience.

It is not a 'need' per se, but I wish we could increase the amount spent to support outreach - as a regular budget item not a campaign item. The primary outreach ministry is support of Hope Food Pantry - mainly in providing space, advertising, and a core of committed volunteers. I think the promise implicit in the proposed capital campaign is that we would increase in members, formation opportunities for all ages, and awareness of our church in the local community which would hopefully expand the capacity and interest in outreach. Budgets should reflect commitment to our values and for too long our budget has been weighted towards the building. My personal hope is that a successful campaign will fuel our turning outwards not inwards.

Minor interior remodeling of some spaces to make them more use appropriate. Possibly shared with Hope food Pantry. \$60K - 70K.

I think the case statement covers the appropriate range of needs.

Windows and masonry tuckpointing.

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?

44 Yes 1 No 8 Yes, but with some concerns

Eighty-three percent are in favor of the campaign, with another 15% 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:

We are in the enviable position of having adequate funding based upon retirement of mortgage debt in the next four years and a \$700,000+ fund intended for building repairs. Pledges cover most of operating costs. I am unclear as to why some of the desired project funds cannot be covered by the Vanguard funds.

The two positions outlined in the campaign should not be included as capital, but as operating expenses covered by pledges to ensure sustainability. The building maintenance (\$530,000) is not a choice, but instead must be done. Additionally, would alternatives to carpet be a healthier, sustainable solution?

Although we will be able to pay off our debts and complete some deferred maintenance, thanks to the large gift and a grant in recent years, can we really afford to maintain such a large building? What makes us so confident our parish will grow to a point where we can truly afford to live here, when most other churches' membership continues to decline?

I'd like to be careful not to make folks, especially newer members, feel they've jumped onto a ship needing constant patching to stay afloat. I'd like to emphasize the benefits and the shared aspects.

5. Please indicate the level of priority you 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				Lack
		High	Medium	Low	Opposed	Information
a.	Full Roof Replacement	<u>42</u>	<u>4</u>	<u>3</u>	<u>0</u>	<u>4</u>
b.	HVAC System Upgrade	<u>32</u>	<u>18</u>	<u>1</u>	<u>0</u>	<u>3</u>
c.	Carpet Replacement on Upper Level	<u>9</u>	<u>26</u>	<u>14</u>	<u>2</u>	<u>2</u>
d.	One Half-Time Staff Position over Three Years - Formation	<u>23</u>	<u>22</u>	<u>4</u>	<u>1</u>	<u>3</u>
e.	One Half-Time Staff Position over Three Years – Building Manager	<u>13</u>	<u>31</u>	<u>3</u>	<u>1</u>	<u>5</u>
f.	Endowment Fund	<u>9</u>	<u>26</u>	<u>11</u>	<u>0</u>	<u>6</u>

Comments:

Can we combine the two staff positions into one?

E.) Maybe a 10 hr. per week job; other places in the neighborhood have coordinators but our need is not as large.

I'd rather see a maintenance fund.

A.) Believe roof replacement need is not immediate as damage was caused by faulty flashing and failed tuckpointing which has been repaired. The shingles are currently in good condition. We have five years before full replacement is necessary. F.) Believe the endowment fund should initially be funded by the foundation money. B&C are our most important needs at this time. The HVAC system has been a problem since we added the addition and is critical to ensure comfort of worshipers and participants. The state of the carpeting is lamentable due to various leaks over the years. D.) I would like to see a curate handle formation. E.) Not sure that we need a half-time person as a building manager. Perhaps two days per week is adequate.

Do we need carpet? Would another type of flooring be more cost effective?

I do agree with hiring for a Staff position for Formation but I'm not sure we need someone solely working on Formation 20 hours a week. Maybe start w/10 hours per week and increase if needed.

We shouldn't count on an endowment fund to pay for operating expenses. There will be no end to it and will require regular capital campaigns.

What is the endowment for?

C.) I think the carpet in the office part is much worse than the carpet in the sanctuary.

I am not involved enough to know what is most urgent. If the top two building issues are urgent, I suppose that would be most important.

I think it's especially important to establish an endowment fund so that it is an attractive place for parishioners to give during the coming generational wealth transfer as Baby Boomers enter their elderly years. This is a one-time opportunity, and faith communities need to take advantage of it in light of changing demographic giving patterns.

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

Comments:

Lots of optimism. General feeling positive.

Knowing that the church is solidified and here to stay.

Maybe the threat of closing will inspire others to give for the future.

The people.

Kristin.

The congregation: parishioners are dedicated to the well-being of our church. Our purpose is clear.

Believe our parishioners have a strong desire to see St. Lawrence and its ministries to our own community and the wider world around us continue into the future. Believe parishioners are willing to support this campaign if the goals are presented in a fashion that makes sense and supports our vision.

Congregational love and enthusiasm for the church and building.

Many new families are attending.

Growth in membership brings new energy to the parish. We have momentum to build upon.

These are, for the most part, basic needs of any building to maintain the integrity of the structure.

The parish community is usually very generous.

Everyone can visibly see the problem that the leaking roof caused.

There seems to be an optimistic outlook within the congregation. Our leadership seems to have a good read of the congregation and their proposal addresses a lot of needs while balancing the needs of the building and program growth. The target figure is ambitious without overreaching.

A devoted congregation.

The current financial stability and congregational support.

Energetic, articulate priest. Committed laity.

There are families which are members who were not members when the last campaign was completed.

Generous parishioners.

Our church is growing and attracting more young families. We are in a much healthier financial position (mortgage to be paid off) so that we can now work toward addressing funding for staff positions for growth in formation activities and building usage.

We have more people now.

Positive outlook on the future growth of the congregation.

Enthusiasm.

Kristin!

There is an enthusiastic group of people who have recently joined the church.

We are growing and enthusiasm is high. We have also spent a lot of time in the last few years educating the parish and defining specific needs, so I believe most people agree it's needed.

There is momentum behind expanding formation and a part-time staff person. The growth in the past year or so of younger families has been very encouraging.

Our location and potential to become a more integral part of the community. We also have a very dynamic leader in Kristin, but she will not be here forever.

Excellent Sunday School program already in place.

A significant number of engaged members of the congregation.

Willing parishioners who pitch in when needed.

A faithful, energetic, and engaged rector. A core group of committed members from which lay leaders are identified. The campaign plans are NOT only about the building maintenance/repair - I think the staff positions are very forward looking.

Great community support and enthusiasm.

We are an active congregation.

We are on an upward curve of enthusiasm and if we can build on that and minimize fear and worry, we'll do fine. We must be careful not to overreach like we were led to do when we built the new sanctuary addition though.

Friendly, vibrant, optimistic parishioners; positive demographic trends in community (transplants from inner suburbs, etc.) contributing to growth; energy from new hope about long-term viability of our space.

Increased membership and involvement in current church functions shows desire to support the church going forward.

Energetic parish.

The present financial security of the church.

There are more new members.

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

Comments:

We don't have the funding. People are asked to stretch every year.

Not sure of people's capacity.

A large percentage of parishioners are now in retirement and are living on a fixed income, which may limit their giving. Two of our largest donors have already stepped forward with significant funding. I will be interested to learn what the Capital Campaign consultant has learned about the parish's ability to come up with the desired funding.

The current economy, changing demographics of the congregation (i.e. younger=less discretionary income?) and the small size of the congregation.

How does this enable sustainable growth to increase operating income?

People thinking the campaign is unnecessary because of the major gifts we've already received.

Building supplies are still impacted by global constraints and as such prices for materials are high.

Some people might be irritated being asked for money beyond what they already regularly pledge.

A lot depends on the economy right now. Inflation, interest rates and other factors could impact the ability of members to meet their pledges over the course of three years.

A number of people on fixed incomes.

Honoring pledge commitments.

Many of the members are retired and may (like me) be on a fixed income.

The economy now has made it difficult for some people to be as generous as they would like to be.

The understanding that after three years these positions will need to be absorbed into the annual budget.

Low membership. Newer families are younger (good) but maybe can't afford large donations. Older folks may be on a limited income.

Many young families without extra cash as well as older people without income.

Small membership means more needed per household.

Many of the new people have families. Not sure they will have financial means to support a capital campaign.

In general, people's personal budgets are tight so the amount we can raise may be limited. Also, looking at the Staffing numbers over three years is a lot.

Retired parishioners are many of the same parishioners who have financially supported the church for the past twenty years. Not sure what their giving capacity will be.

The need for frequent capital campaigns to support our operations.

In my experience, many of the most engaged members may be at or near retirement. May not have much more to give than they already do. Also, many young families; not clear what they can give in addition to current pledges.

We do not appear large enough in numbers yet to sustain the necessary giving.

Having taken the building off the market due to two large gifts, there could a number of members who feel exhausted from the building drama and would just like to coast with the new status quo. The financial history and the current financial story are not simple and there is confusion as to why we need to raise more money now.

The congregation is small, and they may feel financially overstretched, as we are asking a lot from a small amount of people.

I hope we can attain our financial goals.

Not being realistic about costs and cost overruns.

You can't please everyone, so even though you are conducting this survey, some people may be disappointed with the distribution of funds.

A lot of our growth is in groups that demographically have less disposable wealth (e.g., young families). I don't know the giving distributions well enough to know how big a factor that will be, but I did find the giving chart in the case statement pretty intimidating looking. I also think we have a very midwestern reticence about talking about money and its necessity for sustainable ministry.

If the parishioners are in a financial position to make the donations.

There are some old timers I haven't seen in a while.

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:

Be sensible.

Keep your eye on the why and express it often to the congregation.

Would like to have maintenance worked into the annual budget.

Transparency about where the money is - foundation.

Listen to people with an open mind knowing you are not going to make everyone happy.

Communicate, communicate, communicate, and be transparent. Communicate how we will do capital improvements moving forward. Every 10 yrs. or so? What is going on with the money we have? What about the foundation money?

Explain the staff positions and endowment better.

The process has been transparent and concrete. Sequential. In the past we have had little fundraisers that were fun and gathered the community. Hopefully we can have fun in social gathering during the campaign.

I believe that the hiring of a Capital Campaign consultant was a good decision to supply the necessary expertise and perspective on how to achieve our goals. Suggest that the finance committee's expertise should be tapped to review the proposed funding categories and ensure that parishioners only are asked to support those that make sense in view of the existing funding available.

Focus the campaign on capital repairs and building an endowment fund. Can we leverage the Better Together community to "share" 1-2 people who can be one full-time formation position and one full-time building management position?

The chart of donation amounts on the case statement is super confusing.

The thought that we wouldn't let our earthly home fall into disrepair, so why would we let our spiritual one, seems to resonate.

I cannot think of any right now, but I will reach out to leadership if I think of anything.

Continuous progress toward goal communication.

Maybe look at a way to create one huge fundraiser to help and/or rent building.

I do not understand why the Foundation cannot fund some or all of the roof. Under the present Foundation rules, it seems impossible to use the considerable money that is just sitting there and inaccessible. Time to change the rules!

Get the money before taking on the projects.

Communicate the needs clearly and often. Share progress on the campaign once it begins clearly and often.

Define a little more clearly what tasks the new Building Manager and Formation Lead would do and how they would contribute to the overall well-being of the church and parish.

Will people outside the current membership (e.g. former long-term members who have relocated) be solicited for gifts to the campaign? It might not have a big return, but an appeal pitched to helping St. Lawrence continue to thrive might bolster the donations.

I have serious concerns about the campaign consultant. She is taking a lot of the money the campaign will raise, but the weekend interviews were handled very poorly. I would like to know if St. Lawrence is still being billed for her travel expenses when all the weekend activities were handled over zoom, and if zoom was fine why were we paying the expense of in-person activities in the first place? I'm leery of contributing when it seems like so much of the money will just be going to pay her, and I'm concerned that it sounds like she may have alienated important donors by exposing them to Covid.

Looking at people who have made large donations in the past.

Are there other anticipated capital needs over the next 10 years?

OPEN, OPEN, OPEN communication - don't let the rumors run away with us. When folks are fearful financially, they need constant reassurance. It's an ongoing case of that buyer's remorse one feels when purchasing something major, even if it is the necessary thing to do.

Do we regularly share the distribution of gift numbers and size in a general enough way to ensure reasonable anonymity? Anxieties like mine might be defrayed if I could put them in that wider, more concrete context.

Tap into the talents/gifts of all the congregation without taking advantage of the same few. If it can be split among many, it lessens the chance for discontent.

I like that we have a consultant working with us.

Would including examples of graduated giving encourage some members? For example, someone may be more likely to pledge more if they could do something like this: First year: \$100 per month. Second year \$150 per month. Third year \$200 per month for a total of \$5400.

Leadership

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

13 Yes 15 No 22 Not sure at this time

Twenty-six percent would be willing at this early date to volunteer. Another 44% 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. Among individuals you know, who would you recommend be the Campaign Chair and/or serve on the campaign committee?

Brian Bowers	
Rob Broms	
Susan Fink	
Kip Gasper	
Glenn Gustafson	
Steve Haight	
Mike Hazen	3
Steve Jepson	
Dave Jones	4
Julia Karnstedt	4
John Snow	
Debbie Springgate	

Everyone at St Lawrence would do a great job. Truly, this community is so committed.

All the best people in the parish already seem stretched.

Campaign Timing

11. Does a proposed solicitation period for pledges in the Fall of 2024 seem appropriate to you?

29 Yes 2 No 21 No strong feeling

More than half of the respondents, 56%, are in favor of the proposed timing. Forty percent expressed no strong feeling one way or another. The remaining two respondents were opposed to the campaign timing. This is an endorsement that a campaign could proceed as scheduled.

Gift Potential

12. How would you describe the present economic climate in your community?

3 Excellent 33 Good 11 Fair 0 Poor

Seventy percent of the respondents to this question believe the present local economy is good; 23% consider it fair. Seven percent believe it to be excellent, and no respondents rated it as poor.

13. Is the present economic climate improving, remaining the same, or declining for you personally?

9 Improving 27 Remaining the Same 11 Declining

Indications are that the local economy is remaining the same, with 58% rating it as such. Another 19% believe it is improving, and 23% believe it is declining. These responses express some economic optimism. When people feel the economy is good, they are more apt to make gifts.

14. Do you think a goal of \$850,000 (as outlined in the proposed plans) can be raised in gifts and pledges?

12 Yes 6 No 35 Don't Know

Twenty-three percent believe the goal can be attained, while the majority, 66%, have no opinion if it can be reached. Another 11% 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?

\$250,000

\$500,000

I do not have a figure in mind, but I would look at current giving as a guide. It does not seem likely that most members could or would give for a capital campaign as much as their current giving. Is there data available on this?

We have lost many of the older parishioners and high contributors due to death or retirement. Younger families cannot afford.

I'd have to rely on the professionals - but hope they also realize the cost of living in our area stretches folks a lot just to maintain homes.

**15. 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.)**

 45 Yes 2 No 6 Not sure at this time

Eighty-five percent would be willing at this early date to contribute to the campaign, while another 11% expressed that they are not sure at this time. Only two respondents indicated a negative response. This is positive and an indication that a campaign can proceed.

**16. 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> 0 </u> \$150,000 and above	
<u> 0 </u> \$100,000 to \$150,000	<u> 0 </u> \$75,000 to \$100,000
<u> 0 </u> \$50,000 to \$75,000	<u> 4 </u> \$25,000 to \$50,000
<u> 7 </u> \$10,000 to \$25,000	<u> 8 </u> \$5,000 to \$10,000
<u> 7 </u> \$3,000 to \$5,000	<u> 7 </u> \$1,000 to \$3,000
<u> 7 </u> \$500 to \$1,000	<u> 2 </u> \$500 and below

Typical Gifts Essential to the Success of a \$850,000 Capital Campaign

Size of Gift	# Needed	Gifts Indicated in Study*
\$150,000	1	0
\$100,000	1	0
\$75,000	2	0
\$50,000	3	4
\$25,000	5	7
\$10,000	6	8
\$5,000	10	7
\$3,000	13	7
\$1,000	15	7
\$500 and below	Many	2

*Using the high range estimate

Respondents projected donations ranging from a low of approximately \$245,000 to a high of \$519,000. 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 \$850,000 as a primary goal.

Planned Giving

Please check if:

17. 3 St. Lawrence Episcopal Church is already in your will or estate plans.
18. 7 you are aware of our legacy society
19. 4 you would like more information about (Planned giving, endowment, legacy)
20. 2 you are interested in helping raise awareness about planned giving at St. Lawrence.

Three individuals have already included the church in their estate plans. A few others have indicated they would welcome information.

A Final Word

Core Capital Campaigns thanks the leadership of St. Lawrence 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**