

**Pre-Capital Campaign
Feasibility Study Report**

for

**St. John The Divine
Burlington, WI**

**August
2016**

Prepared by

The James Company

Turning Your Vision Into Reality

August 2016

Fr. Jason Lavann, Rector
St. John the Divine
216 E. Chandler Blvd.
Burlington, WI 53105

Dear Fr. Jason,

We wish to extend our thanks to all for the cooperation, support, and gracious hospitality extended to us throughout the Feasibility Study. During the implementation process, we found friendly, concerned, and open communication regarding the proposed campaign and project plans. A special word of thanks goes to the entire Feasibility Study Team for their helpful guidance.

This Final Report is our distillation of the information, opinions, and ideas gathered through the Feasibility Study process. It represents our combined evaluation and appraisal of major factors related to the proposed capital stewardship campaign.

Now, important decisions must be made to continue the momentum essential to your success. *The James Company* welcomes the opportunity to provide continued assistance.

Blessings,



Tim McKearn
Program Director



Rita Hanlon
Program Administrator

Feasibility Study

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Section One

Feasibility Study Methodology

INTRODUCTION

At the invitation of St. John the Divine (hereafter referred to as SJD), *The James Company* stewardship development group conducted a Feasibility Study to determine the level of support for implementing a capital stewardship campaign.

The facts, findings, and recommendations of the resulting process, now complete, provide a sound basis for leadership decisions with regard to conducting a capital stewardship campaign at this time. A copy of the Feasibility Study brochure is included as an appendix.

FEASIBILITY STUDY

As SJD considers a capital stewardship campaign, several important questions need to be explored:

- The awareness level of the parish of SJD regarding the proposed capital campaign. This helps isolate areas which the education and cultivation phase will address.
- The strong points and questions/concerns that might affect a campaign. This process also helps determine the thrust of a future education plan – emphasizing and enhancing the strengths of the proposed building plan and determining the areas of concern so they can be addressed.
- The level of potential leadership available to conduct a successful campaign.
- The level of financial support amongst the parish and friends of SJD available for a campaign.

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

The study was conducted in four phases: research and preparation, personal interviews, Interactive Information Gatherings, and a Parish-wide survey distribution.

Phase 1

An examination of SJD's needs, development of a "Case Statement," determination of optimum campaign goals and timing, preparation for interactive Information Gatherings, and selection of personal interview prospects were completed during sessions with the Feasibility Study Team.

Phase 2

The case statement brochure was distributed to all SJD member households and an invitation was extended to attend interactive Information Sessions offered to present the proposed building plan and receive feedback.

Phase 3

The survey was made available to all member households. The survey was available online or in hard copy. 27 Surveys were received.

Phase 4

A sampling of households representing leadership and a cross-section of individuals were selected for personal interviews. A total of 16 households were interviewed or filled out extensive surveys, with 16 households providing a gift range. The confidential interviews were conducted by Tim McKearn of *The James Company*.

ELEMENTS OF A SUCCESSFUL CAMPAIGN

There are certain elements which must exist in connection with every successful fund-raising campaign.

1. Recognition and acceptance of the “tentative needs” as expressed, and an understanding of the benefits of the proposed plan for the mission and vision of SJD.
2. The case for widespread appeal.
3. Availability of strong financial leadership.
4. Respect for current lay and pastoral leadership.
5. The capability of existing leadership to recruit additional support.
6. Past and current support levels for other SJD capital campaigns.
7. The awareness of the proposed plans.
8. The economic optimism of SJD membership.
9. Overall response to goal attainability.
10. Indicated interest in contributing to, and projected levels of support for the proposed campaign.
11. Projected timing of the campaign.

These elements are carefully reviewed in this report. The Interpretation, Recommendations, and Acknowledgements Section addresses these elements of success as we consider the readiness of SJD 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.

Section Two

SJD's Survey Responses

1. LIST THE THINGS YOU LIKE BEST ABOUT THE PROPOSED PROJECTS.

REPRESENTATIVE COMMENTS

- The plan addresses real needs
- Impressed by the work of the team: transparent, professional and well organized
- Everyone in the parish was given the opportunity to participate
- Bidding process seemed thorough.
- Roof needs to be first priority
- We need to maintain this beautiful place for the future. (We need to be a beacon)

FINDINGS

Many complimented on the work of the committee and in particular suggested the work was professional, organized, transparent and inclusive. Of equal importance for survey responders was that the projects identified in the proposal were the “right projects” reflecting real needs. Several responders also expressed satisfaction that the bidding process was thorough. A small number of responders commented that they believed the timing of 3 years made good sense and agreed with the idea of only doing the work that can be paid for.

2. PROVIDE ANY QUESTIONS, SUGGESTIONS OR CONCERNS YOU HAVE REGARDING THE PROPOSED PROJECTS.

REPRESENTATIVE COMMENTS

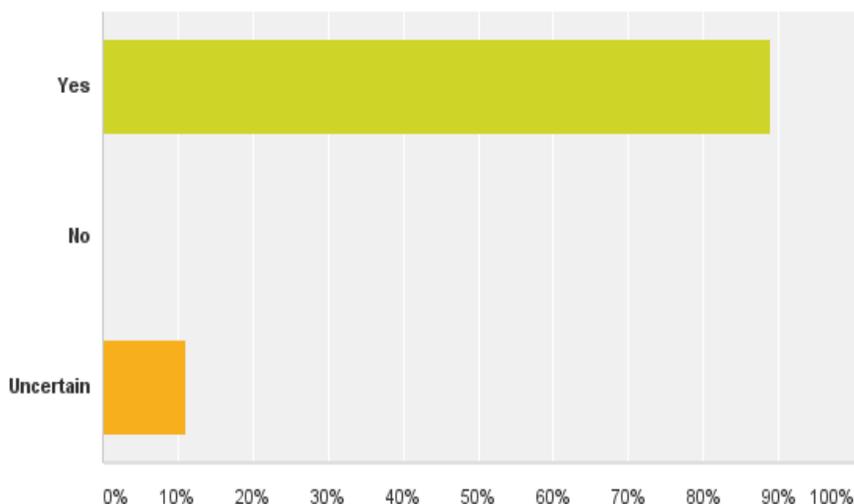
- Parking lot work seems expensive for what we are getting
- Is the parking lot work essential?
- Will contractors provide detailed breakouts of their costs and guarantee their work.

FINDINGS

A small number of responders questioned the need or value of the parking lot work expressing the belief that the work was either too expensive or not as important as roofing and siding work.

3. I/WE WOULD FINANCIALLY SUPPORT A FUNDRAISING EFFORT FOR THE PROPOSED PROJECTS.

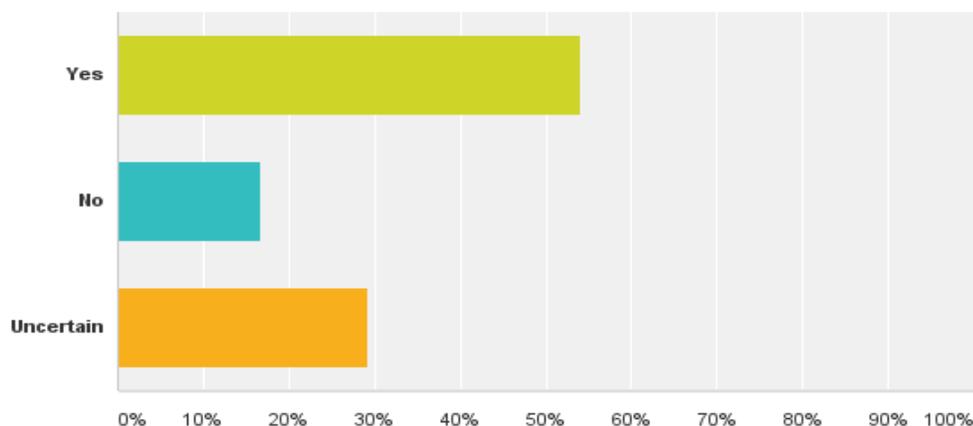
Answered: 27 Skipped: 0



FINDINGS

Of the 27 surveys submitted, all 27 responded to this question. 89% indicated they would financially support the plan while 11% said they were uncertain. No responders indicated they would not financially support the proposal. In our experience, many of those who provided uncertain responses become yes responses over time as they get more familiar with the final plans and get answers to questions they have. At a minimum we would like to see at least a 60% affirmative response rate. This is a very strong affirmative response.

4. I/WE WOULD LIKE MORE INFORMATION ABOUT HOW I/WE CAN VOLUNTEER OUR TIME TO SUPPORT THIS PROJECT.



FINDINGS

Of the 27 surveys submitted, all 27 responded to this question with 54% indicating they would like to learn more about volunteering and 17% indicated they were not interested in learning more about volunteering. The remaining 29% were uncertain. Response rates above 50% are considered to be strong.

Section Three

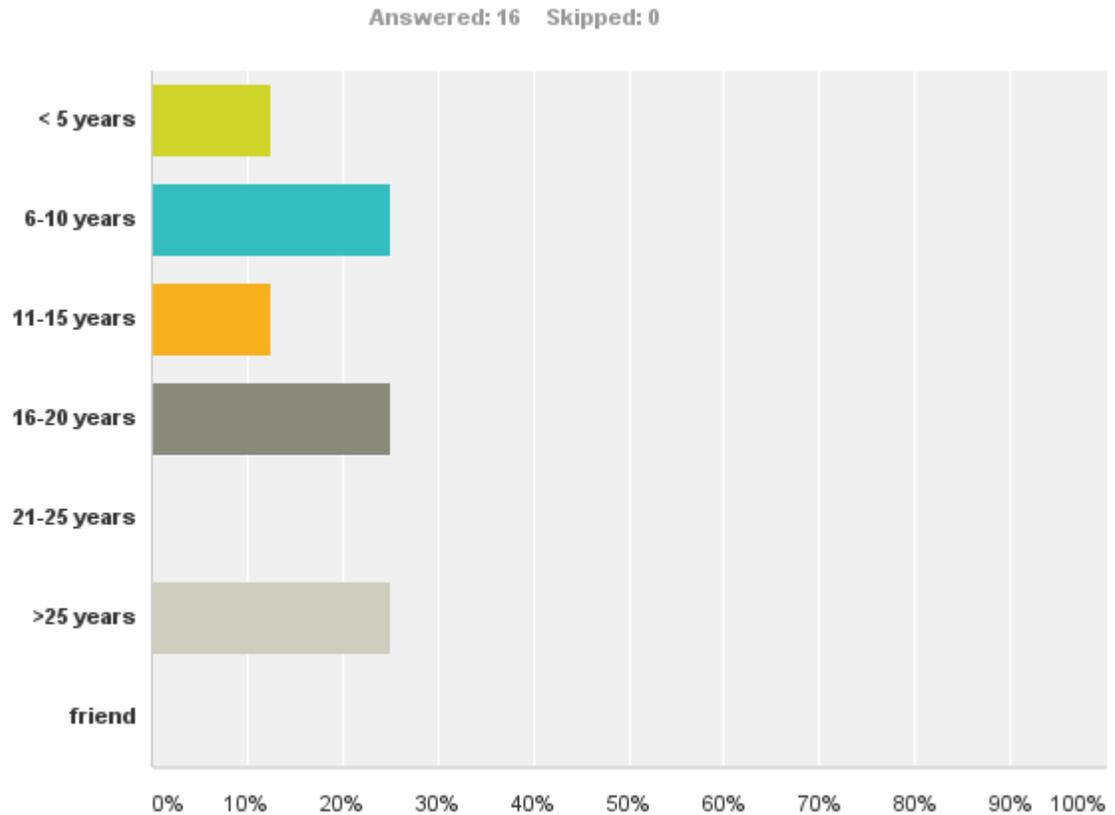
The Interview Group

INTERVIEW DATA & INTERPRETATION

INTERPRETATION NOTES

Sixteen households participated in interview sessions or filled out extensive surveys request. Even though individual responses were recorded, occasionally a respondent did not answer every question, therefore the number of responses vary.

1. HOW LONG HAVE YOU BEEN A MEMBER OF SJD?



Answer Options	Response Percent	Response Count
< 5 years	12.5%	2
6-10 years	25.0%	4
11-15 years	12.5%	2
16-20 years	25.0%	4
21-25 years	0.0%	0
>25 years	25.0%	4
friend	0.0%	0
<i>answered question</i>		16
<i>skipped question</i>		0

REPRESENTATIVE COMMENTS

- My spouse was one faith, I was another, this felt like home to both of us.
- I attended another church but just felt more comfortable here.
- We moved here and were already Episcopalian so this worked for us.
- We liked the hospitality, vibrancy and activity here

FINDINGS

A good cross section of members in terms of length of membership were interviewed.

2. WHAT ARE THE MINISTRY AREAS OF SJD THAT ARE MOST MEANINGFUL TO YOU AND/OR YOUR FAMILY? DO YOU SERVE IN ANY MINISTRY AREAS OF THE CHURCH AT THE CURRENT TIME OR IN THE PAST AND IF SO WHAT MINISTRIES?

REPRESENTATIVE COMMENTS

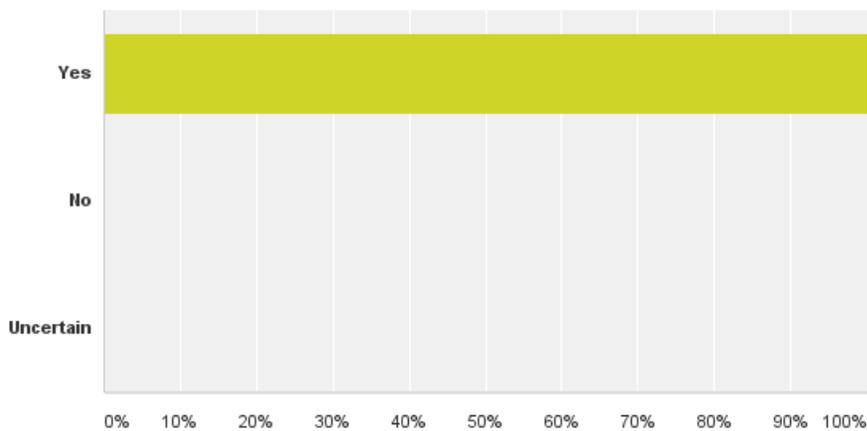
- This church was so welcoming
- There is a strong community here
- Community Outreach is strong
- We have always worked on the Thanksgiving Dinner
- Love Inc. activities have been important to us

FINDINGS

Everyone interviewed was able to identify ministry areas that have been most meaningful to them. A wide range of ministry/outreach efforts were identified by multiple responders with Love, Inc., Thanksgiving Dinner and Finance/Vestry being the top three responses.

3. ARE YOU SUPPORTIVE OF THE PASTORAL AND LAY LEADERSHIP OF SJD? WHAT ARE THE MINISTRY STRENGTHS OF SJD? WHAT MINISTRY AREAS, IF ANY, COULD BE IMPROVED?

Answered: 16 Skipped: 0



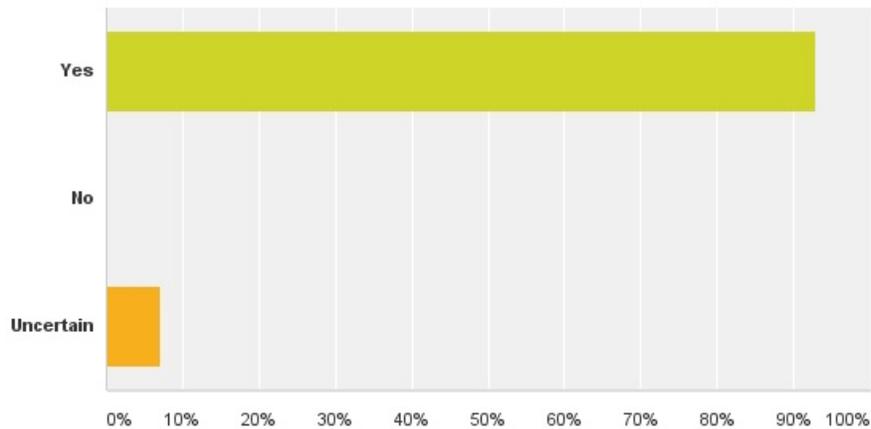
Answer Options	Response Percent	Response Count
Yes	100.0%	16
No	0.0%	0
Uncertain	0.0%	0
<i>answered question</i>		16
<i>skipped question</i>		0

FINDINGS

Support for current pastoral and lay leadership was overwhelmingly positive. Strengths of the parish were identified as being welcoming, reaching out to the community and building a sense of community with SJD. Many responders commented that members are willing to pitch in and help and that there is a culture here that encourages people to try something. When asked to identify areas for improvement most did not identify an issue and no issue was raised more than once.

4. HAVING REVIEWED THE CASE STATEMENT BROCHURE, DO YOU BELIEVE THE PROJECTS DESCRIBED ADDRESS THE NEEDS OF SJD? WHAT ELEMENTS OF THE PLAN DO YOU LIKE MOST? ARE THERE ELEMENTS MISSING FROM THE PROPOSAL?

Answered: 14 Skipped: 2

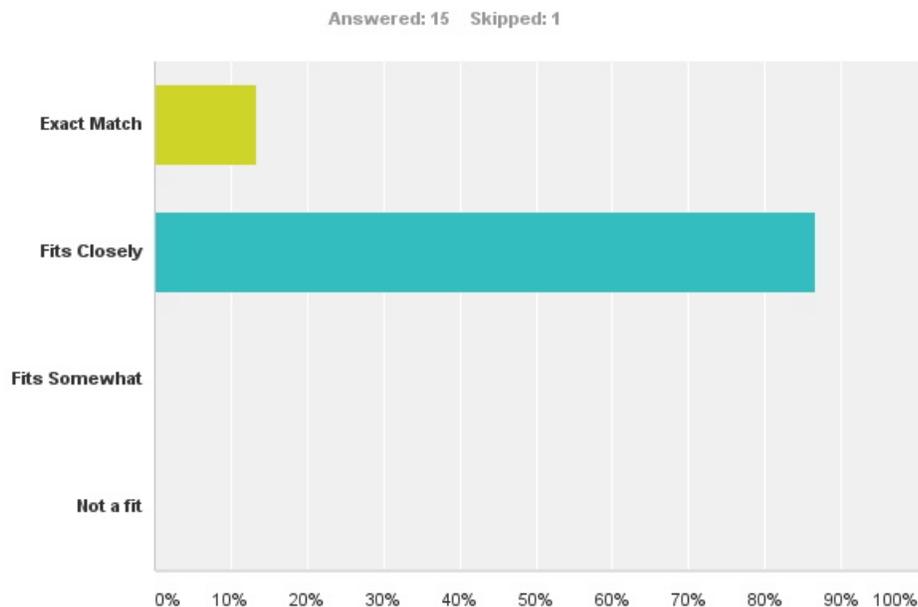


Answer Options	Response Percent	Response Count
Yes	92.9%	13
No	0.0%	0
Uncertain	7.1%	1
<i>answered question</i>		14
<i>skipped question</i>		2

FINDINGS

Overwhelmingly those interviewed believed the plan addresses the needs of SJD. Everyone had reviewed the material prior to sitting for the interview or responding to the extended survey and most attended or planned to attend one of the Information Sessions. When asked what elements they liked the most, the top responses were the roof, siding and parking lot in that order. A few of those interviewed indicated the parking lot may not be that big of a priority at all. Almost half of those responding indicated a hope that some interior work could also be done, most often the sanctuary walls were identified as an interior priority.

5. WHEN YOU THINK ABOUT YOUR PERSONAL PHILANTHROPIC PRIORITIES, HOW CLOSE ARE THEY TO THE PRIORITIES OUTLINED IN THE CASE STATEMENT BROCHURE?



Answer Options	Response Percent	Response Count
Exact Match	13.3%	2
Fits Closely	86.7%	13
Fits Somewhat	0.0%	0
Not a fit	0.0%	0
<i>answered question</i>		15
<i>skipped question</i>		1

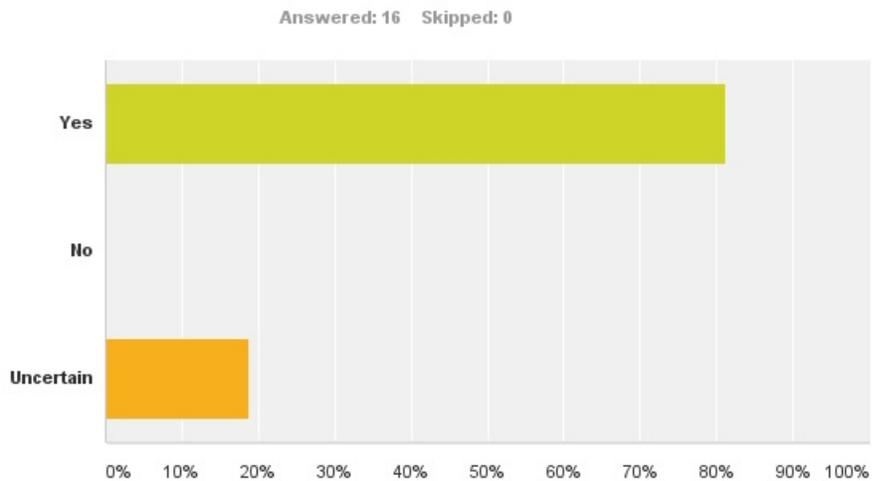
REPRESENTATIVE COMMENTS

- This church is our second home
- SJD is one of my top priorities
- We must ensure the viability of this building for future generations
- This church is our number one priority.
- If our building isn't strong then we can't achieve our outreach goals

FINDINGS

100% of those interviewed indicated that the priorities of the plan either fit closely or are an exact match with their own personal philanthropic priorities. This is a very high percentage and indicates that we are more likely to witness sacrificial giving from the membership of SJD.

6. DO YOU THINK THE FINANCIAL GOALS OF THE PROPOSED PLAN ARE FEASIBLE FOR SJD TO ACHIEVE?



Answer Options	Response Percent	Response Count
Yes	81.3%	13
No	0.0%	0
Uncertain	18.8%	3
<i>answered question</i>		16
<i>skipped question</i>		0

REPRESENTATIVE COMMENTS

- I think it's possible but people will have to dig deep.
- Everyone will have to participate.
- I don't know much about the capacity of our members.
- If everyone is given clear info we can be successful.

FINDINGS

To a high degree, members are optimistic that the goal can be achieved.

7. WHAT DO YOU THINK ARE THE MOST IMPORTANT ACTIONS CHURCH LEADERSHIP CAN TAKE TO ENCOURAGE AND MOTIVATE AS BROAD A BASE OF SJD MEMBERS TO COMMIT THEIR TIME, TALENT, AND FINANCIAL RESOURCES TO REACH THE GOALS DESCRIBED IN THE CASE STATEMENT BROCHURE?

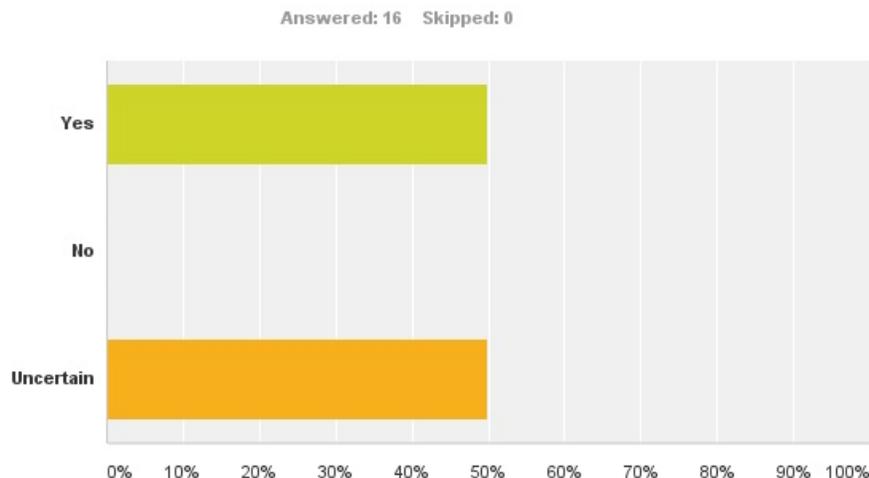
REPRESENTATIVE COMMENTS

- I would like more detail on how the costs break down
- Continued dialogue is important. Education sessions were well done. Continue to build community.
- We need to get people excited and get everyone involved.
- I would have a process going forward that keeps people informed and invites people to go along for the ride. The invitation needs to come from other members, not from Fr. Jason
- Be available to answer questions. Make people feel as though they are part of the process.
- Continue to share information, listen and consider all opinions.
- Retain our current Pastor.

FINDINGS

Trust levels are high between the parish leadership and the congregation. The most common responses suggested that continuing to provide open honest discussion and information was key to success.

8. FROM YOUR PERSPECTIVE, IS IT FEASIBLE THAT WE MIGHT RECEIVE MAJOR GIFTS OF \$25,000 OR MORE OVER A 3 YEAR PERIOD?

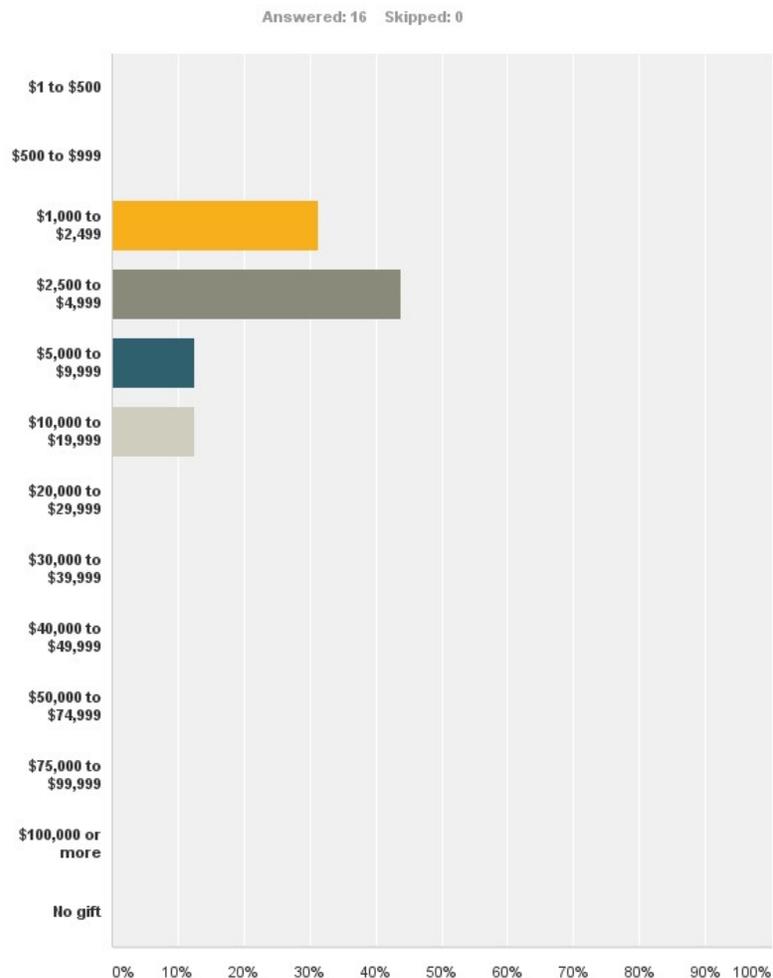


Answer Options	Response Percent	Response Count
Yes	50.0%	8
No	0.0%	0
Uncertain	50.0%	8
<i>answered question</i>		16
<i>skipped question</i>		0

FINDINGS

Of those interviewed, 50% believed that there might be donors at the \$25,000 or more while the remaining 50% were uncertain. There was a total of 4 names that were referenced more than one time by those willing or able to share names. This is not a large number of potential leadership donors. This list will be provided in a confidential memo.

9. **ALTHOUGH WE ARE NOT ASKING YOU TO MAKE A COMMITMENT AT THIS TIME, ARE YOU INCLINED TO SUPPORT THE PROPOSED PLAN WITH A FINANCIAL GIFT OVER A 3-YEAR PERIOD OF TIME? IF SO, WHAT RANGE OF GIFT WOULD YOU BE WILLING TO CONSIDER? ARE THERE ANY CIRCUMSTANCES IN WHICH YOU WOULD CONSIDER INCREASING YOUR SUPPORT? WOULD YOUR GIFT RANGE DIFFER IF YOU WERE ALLOWED A 5-YEAR PLEDGE PAYMENT PERIOD? WOULD YOU BE ABLE TO PROVIDE ALL OR A PORTION OF YOUR GIFT UP FRONT?**



Answer Options	Response Percent	Response Count
\$1 to \$500	0.0%	0
\$500 to \$999	0.0%	0
\$1,000 to \$2,499	31.3%	5
\$2,500 to \$4,999	43.8%	7
\$5,000 to \$9,999	12.5%	2
\$10,000 to \$19,999	12.5%	2
\$20,000 to \$29,999	0.0%	0
\$30,000 to \$39,999	0.0%	0
\$40,000 to \$49,999	0.0%	0
\$50,000 to \$74,999	0.0%	0
\$75,000 to \$99,999	0.0%	0
\$100,000 or more	0.0%	0
No gift	0.0%	0
<i>answered question</i>		16
<i>skipped question</i>		0

FINDINGS

Of the 16 households who were interviewed, 16 gave gift indications. The 16 gift ranges totaled \$57,250 - \$88,250. These same 16 households provided annual stewardship support in 2015 of \$47,312.

Of those responding, 10 households indicated some or all of their gift could be paid up front. There were a small number of gifts that would likely come from stocks, mutual funds or donor advised funds.

10. SUCCESSFUL CAMPAIGNS ARE LEAD BY PEOPLE WHO ARE WELL RESPECTED, HAVE SOLID LEADERSHIP SKILLS OR HAVE REPUTATIONS FOR GETTING THINGS DONE. CAN YOU SUGGEST NAMES OF PEOPLE WHO YOU THINK WOULD DO A GOOD JOB OF LEADING A CAPITAL CAMPAIGN HERE AT SJD?

FINDINGS

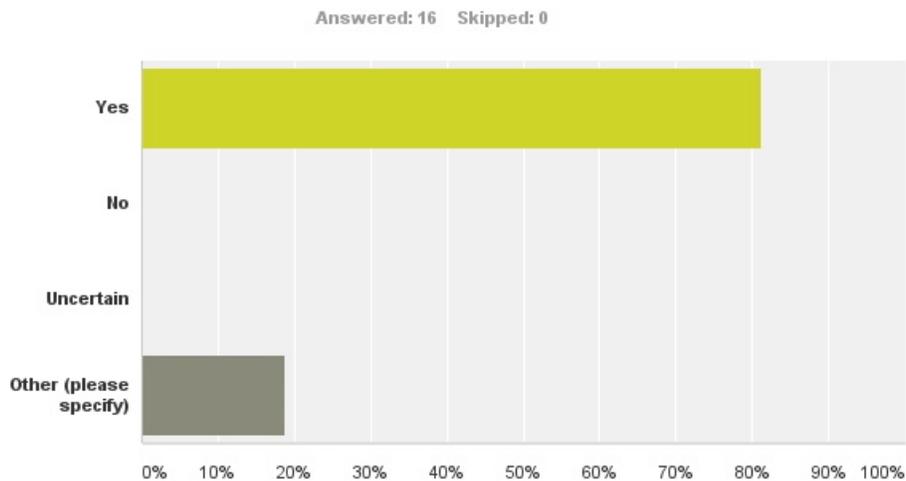
There were a wide range of names suggested by those providing responses. It was also suggested that the current Feasibility Team and vestry are capable leaders to move the project forward. When asked for specific names a total of 17 names were suggested with 7 of those names being listed more than once. Those 7 names are provided in an addendum to this report. This is a strong level of response to the question and supports the belief that this is a congregation where many people jump in and help when it is needed.

11. WHAT IS YOUR WILLINGNESS TO CONSIDER A LEADERSHIP ROLE IF A CAMPAIGN MOVES FORWARD? WOULD YOU BE WILLING TO WORK IN SOME CAPACITY ON THE CAPITAL APPEAL?

FINDINGS

Of the 16 households interviewed 6 were willing to accept a leadership role. This is a strong response. When asked about a willingness to serve in any capacity, 12 indicated a willingness households indicated willingness to play some role in the campaign. Again this is a very strong response which suggests a strong culture of volunteerism. A list of individuals and their responses is provided in the confidential report.

12. IS NOW A GOOD TIME IN THE LIFE OF SJD TO CONDUCT A CAPITAL APPEAL? WHY OR WHY NOT?



Answer Options	Response Percent	Response Count
Yes	81.3%	13
No	0.0%	0
Uncertain	0.0%	0
Other (please specify)	18.8%	3
<i>answered question</i>		16
<i>skipped question</i>		0

REPRESENTATIVE COMMENTS

- Fr. Jason’s status is important
- We’ve looked at these projects for some time. They need to be done.
- We’re in a good position, the Parish is at peace. We need to do these things now

FINDINGS

Optimism amongst the parish is running high, a vast majority believe that the parish is ready and that the timing for a campaign is good.

13. DO YOU HAVE ANY FURTHER COMMENTS THAT YOU WOULD LIKE TO MAKE AT THIS TIME?

REPRESENTATIVE COMMENTS

- Now is a good time to move forward
- People seem to be motivated to do this.
- It's necessary so we have to do this.
- I hope we continue to reach out. Let's not forget about annual stewardship.

Section Four

Interpretation, Recommendations and Acknowledgements

The James Company

Turning Your Vision Into Reality

INTERPRETATION

The interpretation of responses received in this study is a combination of analysis, listening, insight and broad experience in preparing for and conducting capital stewardship campaigns. Although such evaluations are not an exact science, as experienced stewardship advisors, we are able to provide an objective analysis that helps identify strengths, obstacles and potential for raising funds.

Strengths

Both pastoral and lay leadership receive high marks for their transparency and the open and welcoming process that has been used thus far in studying this proposal.

Attendance at the 2 Information Sessions was strong with 46 individuals attending the two sessions. (Leadership Team members were counted at both meetings) There were many questions. The questions never challenged the overall need for conducting a campaign but were focused more on specific details of the plan. An addendum to this report lists all the questions.

The Parish believes that the projects outlined in the case statement are the right ones with a consensus emerging around the following priorities, 1. Roof, 2. Siding, 3. Parking Lot. A fourth possible priority emerged with many expressing a hope that some attention could be paid to interior changes.

The parish has a strong sense of community building as an asset. Top ministries were the Thanksgiving Dinner, outreach, like feeding ministries (breakfast), women's support and a variety of efforts connected to Love, Inc.

Those interviewed indicated a strong belief that this set of priorities addresses the needs at SJD. The proposal priorities match or fits closely the philanthropic priorities of all those interviewed.

81% of those surveyed believe the plan is financially feasible. 16 of 16 households interviewed provided gift range estimates.

Those interviewed provided a wide range of names as potential leaders of the proposed campaign. Of the 17 names that were suggested, 7 were identified more than once.

When asked if now is a good time for SJD to conduct a capital campaign 100% answered yes.

Survey responders were very optimistic about the plan and its feasibility with 54% indicating they would like to learn more about volunteering. 89% of those who responded to the survey said they would financially support a campaign. The remaining 11 % were unsure. 100% of those interviewed indicated a gift range. Unsure responders most typically become donors at some level as their concerns are addressed.

Obstacles

Only 50% of those interviewed believed that major gifts of \$25,000 or more could be found in the parish. In fact, no gifts at the \$25,000 were identified

Only two gifts were identified at the \$10,000 level with one of those indicating a willingness to consider giving beyond that level. Three additional gift ranges were suggested that include caps at the \$10,000 level

To achieve the proposed goal broad participation from the parish will be required.

Opportunities

Capital campaigns provide excellent opportunities for spiritual growth for the entire parish. The parish has indicated a knowledge of the connection between keeping the building in good condition and the ability to conduct ministry

A new tier of potential church leaders can be developed through the work of campaign efforts.

The capital campaign will provide an excellent opportunity for the parish to continue to reach out and welcome others. In other words, there is a great opportunity to connect your ministries with this capital campaign as proposed.

Recommendations

SJD is in a favorable position to move forward with a three-year capital stewardship campaign and we recommend you do so. It is further recommended that SJD combine your Fall stewardship with this capital campaign.

It is recommended that the planning/organizational phase and initial Major Gift cultivation phase begin as soon as possible once the final plans have been determined. The parish-wide cultivation and commitment phase would take place this Fall. The campaign would culminate mid to late November. To achieve broad participation a strategy that involves a strong personal outreach emphasis is suggested.

It is recommended that an initial suggested goal range of \$135,000 be retained as the campaign goal. This number is attainable assuming broad participation can be attained throughout the Parish. We draw this conclusion based on the strong response rates of financial support from both the surveys as well as the interviews. Total giving suggested through the 16 interviews ranged from \$57,250 to \$88,250. These 16 households gave \$47,312 in 2015 Stewardship Giving, suggesting a campaign giving range of 1.21 to 1.86 of 2015 stewardship giving. You may wish to revise the goal upward to address the perceived need of many for interior work to be done in the Nave.

It is recommended to send a note of thanks immediately to those who were interviewed or filled out the more extensive interview. This will build confidence that their input is valued.

It is recommended to provide the congregation with a one-page summary of the Feasibility Study and make the full report available to those who choose to read it. This is an important communication step in building confidence and keeping trust/transparency as a part of the process.

ACKNOWLEDGEMENTS

The James Company is pleased to present this final report with recommendations and wishes to express, once again, appreciation to all who have responded so graciously giving their time and heartfelt opinions to this study. A special thanks to the Feasibility Study Team who guided the process.

The James Company presents these findings and recommendations as a vital step in assisting SJD as the leadership considers launching a major capital campaign.

Respectfully submitted,

The James Company



Tim McKearn
Program Director



Rita Hanlon
Program Administrator