

## Highlights of Immaculate Parish Pre-Campaign Feasibility Study

Generis, Inc., an international Diocesan and parish consulting firm, was recently commissioned by Immaculate Parish to provide counsel and guidance in the conduction of a pre-campaign feasibility study as the first step in the comprehensive parish wide capital campaign. What follows are some of the more important highlights from the parish feasibility study.

1. Participants in Study:
  - a. 441 parishioners completed survey, either in-person, on-line, or in print.
  - b. Represents approximately 400 parish households participated in the study.
  - c. With 507 Giving Households, 400 is nearly a 70% participation level.
  - d. With 694 total Parish Households, 400 is slightly more than a 50% participation level.
  - e. The national average for participation is typically 25% to 35% of the Giving Households.
  - f. Immaculate Parish's participation in this study far exceeds the typical participation level.
2. 30 Lay Leadership Households were interviewed in study, representing approximately 58 persons.
3. 60% of the respondents have been members 16 years or longer with nearly half at age 60 or older. The remainder are almost evenly spread out between those who have been in the parish five years or less, those who have been members between six and ten years, and those who have been members eleven to fifteen years.
4. Notably, more than 90% of the participants are “moderately happy” to “very happy” with “parish programs and ministries.” An even higher percentage, ninety-eight (98%) believe the parish communicates “well” to “very well” regarding “events, plans, and programs.”
5. Greatest strengths?
  - a. Music, Mass, Liturgy - # 1 (Music is highly regarded)
  - b. Parish Staff - # 2
  - c. Religious Education - # 3
6. Areas Needing Strengthening or Improving?
  - a. Building and Facilities - # 1
  - b. Parish Life Activities - # 2
  - c. Outreach and Social Concerns - # 3
  - d. Children and Youth Ministry - # 4
7. Most believe the parish has the capacity to raise \$1M to \$2M in a 3-year capital campaign.
8. 93% of those responding to the survey also self-identify as parishioners who regularly support the parish financially. The overwhelming majority of parishioners make their charitable giving decisions on the basis of either “a dollar amount” or “what they can afford.”
9. When asked whether respondents would make a gift to the capital campaign, 61% said “Yes,” 33% are “Undecided” but only 6% said “No.”
10. Immaculate Parish has 694 Potential Giving Households. 507 of these households participated in giving in 2020. 187 households made no registered gift in 2020. Of the 507 giving households, 377 gave 97% of the total receipts of \$1,032,938.19 in 2020. In other words, while the parish has nearly seven-hundred-member households, only slightly more than half of these households give the lion share of financial support to the parish.
11. Estimating the financial potential of a parish in a 3-year capital campaign is hardly an exact science. Many factors impact a parish's giving potential...
  - a. Widespread understanding of the need and support for the project
  - b. An internal spirit or attitude of optimism within the parish FOR the parish
  - c. The state of the economy and the generosity health within the parish



12. At this stage in the process, many households will conservatively indicate a gift amount they would consider giving during the capital campaign. For this study, we see the following results:
  - a. Three interviewed households indicated gifts of \$100,000 or more
  - b. One household indicated a gift between \$50,000 and \$75,000
  - c. Eight households between \$25,000 and \$50,000
  - d. Seven households between \$15,000 and \$25,000
  - e. Another six households between \$10,000 and \$15,000
  - f. Twenty-seven households between \$5,000 and \$10,000
  - g. Forty-four households between \$3,000 and \$5,000
  - h. One-hundred, thirty-two households between \$1,500 and \$3,000
  - i. Ninety-five additional households indicated varying gift levels at \$1,500 or less
13. In summary, the reasonable expectancy in this capital campaign is \$1.6M to \$2.5M.
14. Recommendations (in brief summary):
  - a. Generis heartily recommends the parish go forward with confidence in a capital campaign.
  - b. The parish should anticipate receiving between \$2M and \$2.5M or more over 3-years.
  - c. The parish should promote the charitable giving incentives in Congressional CARES Act.
  - d. The timeline for the campaign should be as follows:
    - i. Financial Leader Phase – March, April, May
    - ii. Leadership Core Phase – June, July, August
    - iii. Public Phase – September, October, November
  - e. Generis recommends a 2-fold approach in the campaign:
    - i. Goal One – a prioritized project at a cost of approximately \$2.5M
    - ii. Goal Two – a prioritized list of additional projects in descending order and costs
  - f. Generis recommends parish become intentional about creating and promoting Christian growth in generosity and discipleship with emphasis on the 3 “pockets” for giving:
    - i. Offertory Pocket – giving to the parish’s annual mission / ministry budget
    - ii. Special Project Pocket – giving to the Diocesan Annual Appeal; Capital Campaign
    - iii. Legacy Pocket – giving from ones accumulated assets
  - g. Generis recommends parish’s “Next New Hire” should be that of a Communication Specialist, someone trained and experienced in digital giving, the social media environment, website engagement specialist, and one familiar with Google analytics.
  - h. Generis recommends the parish plan to hold Mass and conduct ministry programs in the future that include a digital connecting or engagement mechanism.
  - i. Generis recommends the parish adopt a “Spiritual Gifts” assessment tool and an analytical tool for parish giving and parishioner engagement. These tools will enable the parish to grow in a post-pandemic where the “ways” we do church are likely to be significantly different from pre-pandemic times.
  - j. Finally, Generis recommends the parish adopt “growth in giving” as a metric for spiritual maturity and parish engagement. In the spiritually and financially healthy parishes, there is measurable growth in “the number of giving households” AND “the average gift per household.”

Respectfully Submitted,

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