

**FUND RAISING PLANNING STUDY REPORT**

*Presented To*

**OUR LADY OF LORETTO CATHOLIC CHURCH  
Novato, CA**



**Walsh & Associates**  
Church Fundraising and Stewardship Specialists

**Confidential**

July 21, 2008

Father William McCain  
Our Lady of Loretto Catholic Church  
1805 Novato Blvd.  
Novato, CA 94947

Dear Father Bill:

I am pleased to submit this report of our fund raising planning and feasibility analysis for Our Lady of Loretto Catholic Church.

The study indicates the potential to raise a minimum of \$2,200,000 over a three-year period for your proposed fund raising project and campaign.

The study results, together with our conclusions and recommendations, are found on the following pages.

This report would not be complete without a word of thanks to you and your church leadership for inviting our firm to conduct this study, which we believe is an important, if not critical, first step toward a successful capital campaign. Our thanks especially to Patrick Reeder, and the office staff who provided helpful information needed and coordinated our interviews.

We look forward to working with you as you implement a successful campaign.

Respectfully submitted,

Michael A. Walsh  
President

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*"Helping Churches and Church Members Reach New Heights"*

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**SECTION A**  
**STUDY PURPOSES & PROCESS**

## **STUDY PURPOSES & PROCESS**

The primary purposes of the fund raising planning study were to determine:

1. The climate for fund raising in the church and community, which involved assessing satisfaction with the church, awareness of and acceptance for the proposed project and campaign, and the competitive environment for philanthropic funds at this time;
2. Your volunteer and volunteer leadership potential and the names of prospective key leaders;
3. Your financial potential and the names and estimated gift potential of prospective key donors;
4. The best way to prepare for and/or proceed with, package and promote your campaign in order to achieve optimum success.

The study process involved four basic phases or steps:

1. **Preparation.** During this phase of the study process, relevant information was gathered about the church and the proposed project; a project description and a gift pyramid were prepared; a survey questionnaire was developed; candidates for confidential interviews were selected, a phone script to be used to invite them to participate in the study was outlined, and interviews were scheduled.
2. **Interviews and Mail Surveys .** A total of fifty-four (54) individuals were involved in thirty-two (32) confidential interviews conducted during the course of our study. The primary purpose of the interviews was to inform people about the proposed project and campaign; to assess their awareness and acceptance of the proposed project and their willingness to support it; and to record their feelings about how others might react and respond. A mail survey was also sent to every registered household not interviewed to allow everyone to express their attitudes about the proposed project and campaign. In all, one hundred and fifty-one (151) mail survey responses were received.
3. **Analysis and Report Preparation.** During this phase of the study, all of the information gathered and recorded was compiled and analyzed, and a written report of the study results and our recommendations was prepared.
4. **Report Presentation.** The final phase of the study process involves presenting our findings and recommendations to the person(s) who authorized the study and answering any questions that might arise. The conclusions reached and recommendations made in this report are based on our analysis of all of the information gathered, responses to our interview questions, and our firm's experience in conducting similar fund raising campaigns.

**SECTION B**  
**INDIVIDUALS INTERVIEWED**

## INDIVIDUALS INTERVIEWED

Richard Angotti	Chick & Gina Kretz
Al Angulo	Lori Limchayseng
Lou and Marge Bartolini	Larry Mazzotta
Thomas & Patsy Berg	Marilyn McCarthy
Buzz & Margaret DeMartini	Gloria & Carlos Mock
Mike & Kathy Doolittle	Steve & Allison Morris
Greg & Dana Erigero	Vern Nathe
Mary & Dave Furnanz	Fran & Dick O'Brien
Cleo & Gerald Gause	Jim & Karen Raccanello
Jean Gross	Dan & Stacey Randall
Jim & Mary Ann Hayes	Wayne & Eva Richards
Larry Hendel	Rita Sabadell
Sean & Eugenia Holt	Mr. & Mrs. Thomas Schleier
Ed Illig	Pauline & John Stuber
Dan Kelly	Cathy Timmer
Ed Koenig	Annie & Tim Troy

**SECTION C**  
**SUMMARY OF ALL RESPONSES**

## SUMMARY OF ALL RESPONSES

In all, one hundred eighty-three (183) survey responses were tabulated. A total of thirty-two (32) confidential interviews were conducted, involving fifty-four (54) individuals, and one hundred fifty-one (151) confidential mail surveys were received and tabulated.

When two or more people were interviewed at the same time (a husband and wife, for example), individual responses were encouraged and recorded where appropriate. At times, two answers were given by an individual to a single question. For example, some may have responded that acceptance of a campaign would be "fair" to "good." In this and similar instances, two answers were recorded. In addition, there were times when a person was not able to answer or, if not appropriate or applicable, was not asked certain questions. This explains why the total number of responses does not always equal the total number of individuals interviewed.

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1. HOW SATISFIED ARE YOU WITH OUR LADY OF LORETTO CATHOLIC CHURCH AND THE PROGRAMS AND SERVICES THAT THE PARISH PROVIDES?

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	<u>NO.</u>	<u>PERCENT</u>
VERY SATISFIED	54	28%
SATISFIED	109	57%
SOMEWHAT DISSATISFIED	23	12%
DISSATISFIED	06	03%

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2. HOW WELL INFORMED WOULD YOU SAY THAT YOU'VE BEEN ABOUT THE CHURCH'S NEEDS AND PLANS TO PERFORM DEFERRED MAINTENANCE ON THE PROPERTY AND BEGIN ENDOWMENTS?

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	<u>NO.</u>	<u>PERCENT</u>
WELL INFORMED	44	22%
HAVE GENERAL KNOWLEDGE	80	40%
KNOW VERY LITTLE	51	26%
UNINFORMED	23	12%

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3. OVERALL, HOW IMPORTANT DO YOU THINK IT IS TO ADDRESS THESE NEEDS?

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	<u>NO.</u>	<u>PERCENT</u>
VERY IMPORTANT	108	55%
IMPORTANT	69	35%
NICE TO DO	17	09%
NOT NEEDED	02	01%

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4. INDIVIDUALLY, HOW WOULD YOU RATE ADDRESSING EACH OF THESE NEEDS AND THE PROPOSED PROJECT'S MAJOR PARTS IN TERMS OF IMPORTANCE?
- 

	VERY IMPORTANT	IMPORTANT	NICE TO HAVE/DO	NOT IMPORTANT
1. Parish Hall Improvements	122/63%	53/27%	18/09%	01/01%
2. Parish Plaza/Piazza Improvements	24/12%	48/25%	97/50%	25/13%
3. Worship Space Improvements	66/34%	66/34%	47/25%	14/07%
4. Education Facility Improvements	114/61%	55/29%	16/08%	03/02%
5. Parish Grounds Improvements	29/15%	61/32%	82/43%	19/10%
6. Parish Endowments	62/35%	55/31%	51/29%	09/05%

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5. WERE YOU AWARE THAT THE PARISH WAS CONSIDERING A MAJOR FUND RAISING CAMPAIGN TO ADDRESS THESE NEEDS?
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	<u>NO.</u>	<u>PERCENT</u>
YES	89	45%
NO	111	55%

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6. IN YOUR OPINION, WHAT WOULD BE THE ACCEPTANCE LEVEL AMONG PARISHIONERS FOR A FUND RAISING CAMPAIGN THAT WOULD ADDRESS THESE NEEDS?
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	<u>NO.</u>	<u>PERCENT</u>
EXCELLENT	10	05%
GOOD	65	33%
FAIR	109	55%
POOR	15	07%

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7. THE COST OF COMPLETING ALL THE REPAIRS IS ESTIMATED TO BE IN THE \$10 MILLION RANGE. HOW MUCH MONEY DO YOU THINK CAN REALISTICALLY BE RAISED FROM ALL PARISHIONERS AND SELECT OTHERS IN PLEDGES PAYABLE OVER THREE YEARS?
- 

	<u>NO.</u>	<u>PERCENT</u>
\$10,000,000 OR MORE	03	02.0%
\$9,000,000 - \$9,999,999	01	00.5%
\$8,000,000 - \$8,999,999	04	02.5%
\$7,000,000 - \$7,999,999	03	02.0%
\$6,000,000 - \$6,999,999	06	04.0%
\$5,000,000 - \$5,999,999	25	16.0%
\$4,000,000 - \$4,999,999	09	05.5%
\$3,000,000 - \$3,999,999	20	12.5%
\$2,000,000 - \$2,999,999	22	14.0%
\$1,000,000 - \$1,999,999	32	20.0%
LESS THAN \$1,000,000	33	21.0%

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8. IN YOUR OPINION, WHO WOULD BE THE THREE TO FIVE BEST PEOPLE TO LEAD A FUND RAISING CAMPAIGN FOR OUR LADY OF LORETTO CATHOLIC CHURCH IF WE COULD GET THEM?
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(Names provided under separate cover.)

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9. IN YOUR OPINION, WHO ARE THE THREE TO FIVE PARISHIONERS WHO MIGHT BE CAPABLE OF MAKING THE LARGEST GIFTS IF THEY WERE SO INCLINED?
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(Names provided under separate cover.)

Every effort was made to ensure accuracy of the above listed names. If a mistake was made, please accept our sincere apologies and bring the error to our attention. Thank you.
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10. IN YOUR OPINION, WHAT INDIVIDUALS AND INSTITUTIONS OUTSIDE OF THE CHURCH COMMUNITY (E.G., FORMER MEMBERS, BUSINESSES AND ORGANIZATIONS, ETC.) MIGHT HAVE THE POTENTIAL AND WILLINGNESS TO MAKE SIGNIFICANT GIFTS?
- 

(Names provided under separate cover)

- 
11. IF A CAMPAIGN IS CONDUCTED, DO YOU THINK YOU MIGHT CONSIDER OR ACCEPT A CAMPAIGN LEADERSHIP POSITION IF ASKED?
- 

	<u>NO.</u>	<u>PERCENT</u>
YES	10	05%
MAYBE	25	12%
NO	167	83%

- 
12. IF NOT A LEADERSHIP POSITION, WOULD YOU WORK ON THE CAMPAIGN IN SOME OTHER CAPACITY?
- 

	<u>NO.</u>	<u>PERCENT</u>
YES	59	29%
MAYBE	75	38%
NO	66	33%

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13. IF A CAMPAIGN IS CONDUCTED, DO YOU THINK YOU WOULD MAKE A GIFT?

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	<u>NO.</u>	<u>PERCENT</u>
YES	119	68%
MAYBE	53	28%
NO	07	04%

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14. IF YOU WERE TO MAKE A GIFT, WHAT RANGE GIFT DO YOU THINK YOU MIGHT CONSIDER OVER A THREE YEAR PERIOD?

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Of the 169 individuals or couples said they would make or would consider making gifts, and 122 mentioned specific amounts or a gift range they might consider. The highest gift that any one person said they would make or would consider was in the \$30,000 to \$50,000 range. Another individual or couple said that they would or might consider a gift of \$30,000 to \$40,000 to the campaign. And finally, a third individual or couple said they might make or consider a gift of \$25,000 to \$50,000. All told, specified gifts ranged from a low total of \$323,570 to a high total of \$556,920.

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15. ARE YOU AWARE OF ANY OTHER CAMPAIGNS THAT ARE IN PROGRESS OR PLANNED THAT MIGHT CONFLICT WITH A CAMPAIGN FOR OUR LADY OF LORETTO CATHOLIC CHURCH?

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	<u>NO.</u>	<u>PERCENT</u>
NO	28	74%
YES	10	26%

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Mentioned twice during interviews were youth ministry (although this is not outside the parish), public school needs, Sutter Novato Community Hospital's new wing, "other charities in general" and the Archdiocesan Annual Appeal. Mentioned three times was Marin Catholic High School's \$15 million campaign (\$8 million already raised), which will allow the school to replace old structures in a 14-month construction project set for 2009.

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16. DO YOU HAVE ANY OTHER COMMENTS OR SUGGESTIONS THAT YOU THINK MIGHT BE IMPORTANT OR HELPFUL TO THIS STUDY OR IN PLANNING A CAMPAIGN?

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**Satisfaction with the Church:**

1. I have a problem with our older parishioners who are inflexible in their ways, who are comfortable only with limited expression of their faith, and have definite ideas on how a parish should be run.
2. People coming to church here look like 70-year-olds going to the dentist. No one smiles.
3. We are moving in the right direction lately in this parish. We've hired a youth minister, added CYO and sports. That has had an impact.
4. We've seen a lot of effort beefing things up lately. The liturgy is enriched. We have more opportunities to be educated, including the Lenten program, so it's not just a Sunday thing, and we have lots of opportunities to socialize.
5. There is no synergy between the church and the school here. We don't have very many young people here. Not enough school families attend Mass. Typically the wage earners are in their 30's to 50's. They are not connecting with the church. We need to connect the school curriculum to Mass. Children should be bringing their parents.
6. We should be having coffee and donuts after Masses. At least people could be encouraged to stand around for half an hour.
7. I would like to see more programs, better catechesis, and more involvement between parish subgroups. I would like to see the church hold a significant place in the city of Novato.
8. I would like to see the amount of time and effort put into the salvation of souls as we put into buildings and maintenance.
9. We have done nothing here in years. For at least 7 years we have seen the needs. We need a disciplined approach to developing a culture of stewardship here. We need to create a culture of giving, and it doesn't exist here at the moment. We need to encourage more people to use the monthly giving program. This would create a revenue stream to meet current needs while creating a surplus which would allow us to contribute to an endowment as well as interact with the broader community of Novato.
10. We need a platform to communicate with everyone in the parish and for dialogue.
11. Our church is on the main street of Novato, yet it looks like the house on the block that is long in the tooth.
12. We need more teen functions.
13. I am dissatisfied with the parish overall, and this is why fundraising is so poor in this parish and archdiocese. Withholding financial support is the only meaningful vote left to us.
14. Where is the financial snapshot we used to see in the bulletin? It certainly hasn't been in there recently.

15. No one is going to give significant amounts of money when priests run people off. The priest represents this parish, and our pastor has a way about him that doesn't welcome parishioner input. People are not valued. He makes comments that are offensive. People have quit organizations and youth have fled. We would be donating a lot more but for the insensitive comments. We see our church falling apart.
16. You go to church elsewhere and see so much more spirit, enthusiasm and life; young people going to church, and families with young children, volunteerism. We could do better here. I have concerns about this parish in general. It is becoming more of a third world parish. The more "they" are involved here, the more turned off the more conservative members of the parish are. We lack fellowship here.
17. My problem is with the way this parish is administered, and this cuts across everything. Parish liturgical ministries are disorganized, for example: at Mass people are running around grabbing altar servers and Eucharistic Ministers at the last minute.
18. I know money is an ugly subject, but it should be addressed more often. More information is needed from the finance committee.
19. We are not meshing as a unified community.
20. We don't focus on community here. Buildings do not make a community. We don't recognize the value of people here.
21. The sense of community is deteriorating: the core group of parishioners is aging; dissatisfaction has caused a number to move to St. Anthony's parish; separate services/programs tend to isolate Hispanics rather than incorporate them, and although no numbers have been released, it is generally thought that Hispanic financial support is not commensurate with their use of services and facilities.
22. We need a change in attitude by the pastor; it is "his parish" until money is needed and then it is "our parish". There is little meaningful delegation or participation which is why it is difficult to get parishioners to serve on the pastoral or finance councils which tend to be window dressing for the archdiocese. Typically it is the pastor's way or the highway; parishioners need to have meaningful involvement in needs assessment, plan development, and execution (they need "ownership").
23. My husband and I have been parishioners of OLL for many years. Our children all attended the school and Marin Catholic. Our parish has changed (this happens) over the years and many of our friends have left the parish and gone to St. Anthony's where they "love the priest and the church." Attendance at OLL is down and we have a large Hispanic Community coming to the noon Mass on Sunday (Spanish Mass). According to the information that Father has given, 30 percent of our OLL community is Hispanic. I would like to see how much financial support that community gives. I do not mean to sound unkind and unchristian. But our parish is slowly drowning and unless everyone supports the parish, it is fruitless. Helping Hands is another organization in the parish that is in trouble. This outreach organization to help people in need, funeral assistance, cannot get enough people to help, not even from the school! It is really tough, and I don't know what the answer is.

**Project Awareness/Acceptance:**

1. Before the case was mailed in anticipation of this interview, I knew very little.

2. The parish community must be fully informed about decisions and reasons for making them. I don't feel that most of us are aware of the extent of the maintenance needs.
3. We talk and we talk and it doesn't get done for one reason or another.
4. We should have done this project five years ago.
5. It is critical that we show why items are needed. Prioritize, and provide details. If it were specific items, we would get the ball rolling, and we would get a good response. We need some small, quick wins.
6. The lack of maintenance is obvious in the church and other facilities, but communication is poor. The arrival of the survey was a surprise. It is impossible to tell from this mailer "needs" and "code violations" mixed with "wants and "desires"; no priorities, no cost estimates or preliminary drawings. Agreeing to a campaign without this information is like buying the proverbial "pig in a poke". Additionally, what is the purpose of the "parish reserve" and why aren't our funds available to us? How much did this survey cost, and why do it if "needs" are essential? There's not enough information to rate individual components intelligently. Differentiate needs and desires in each category. We need cost estimates with limited funds, for ranking. In the case of the parish hall, do the sewers, restrooms and windows first. The piazza is not important—people build community, not piazzas. In the church, electrical, fire suppression and windows come first. Safety comes first in parish ground's improvements. And having a parish endowment is totally unrealistic in the current environment.
7. People can see that things are in trouble.
8. It depends on how the projects and a campaign are structured, especially when we know we can't even raise our Archdiocesan Appeal goal.
9. You need to just pick something and do it. That will be a momentum builder. We don't ask people here enough to contribute, and we should.
10. My concern is safety.
11. We haven't had any of our priests speak directly to these needs.
12. I've been in the parish for over 25 years and often don't attend services at OLL because of the noise level before Mass and the fact that Mass doesn't always start on time. But, I am aware of the need for improvements and maintenance. Even though this is a wish list for the parish, I think it's going to be hard to sell a \$10 million project in this economic environment. I would have liked to have seen a cost analysis for the proposed projects to see how you arrived at \$10 million and then rate the importance of the different projects. New windows for the church, yes; new lights for the stations, no; new lights for the grounds, yes; new signage, no. In the late 80's, maintenance was needed and Monsignor Keane told us that local trades' people couldn't work on the projects; the parish had to use union employees because we were part of the SF Archdiocese. I would think that union wages were factored into this cost. Should we pay the same as San Francisco? A lot of parishioners didn't think so in the 80's and I'm sure that holds true today. Are any parishioner-owned businesses being employed? Are bids being accepted? If you stress "community", I hope you truly use members of the OLL community if they are qualified and can give the best estimate. I'm sure you will work to give parishioners a reasonable and fair budget.

13. Compare this with household maintenance costs and explain it to OLL parishioners at all Masses along with the number of OLL attendees and average donations. Compare it with St. Anthony's Church, too, and explain why there is a need for two parishes so close together. Compare it with luxury items, dining out, coffee lattes, vacation spending, etc.
14. We need better communication. I have been poorly informed. It would seem they could provide an insert telling us more about the maintenance needs. It has reached crisis proportions and we are just hearing about it?! Where has everyone been for the last 40 years?
15. What's frustrating in this rating system on this question is that we don't have the opportunity to rate individual list items for each building. Parish hall? Take it or leave it. This contributes to the perception that there is not enough transparency and trust on what might be done on something new. In this day in the church, we need transparency, not only regarding abuse issues but also on the basic needs of maintaining the parish.
16. Safety issues in the educational facilities are very important, but it is only somewhat important to add or move classrooms. We need to separate the maintenance and safety from expansion, enhancement, and all the projects that the parish is considering.
17. Fire safety issues are more than very important.
18. Parish endowments should be a line item of our parish operating budget.
19. A safety issue of lighting is different from parish grounds improvements.
20. Why has the parish plant been neglected so long? Why weren't we told? Once we publicize that there is a problem, we open ourselves to lawsuits. I think ADA issues must be prioritized highly. Safety is THE priority, to prevent potential lawsuits. Liabilities build up. We must protect the children. I say this even though we have none. Safety issues have to be corrected immediately, even before fundraising takes place.
21. With the school facility in such bad shape, it's no wonder enrollment is down.
22. I notice the rectory is not on the list, and I know there must be many needs for this building, also.
23. For the amount of use it gets, the hall should be upgraded, and we could use it as a huge source of income.
24. Parish endowments are more than very important because this is our future.
25. The piazza in my opinion is last. The worship space is okay as it is. I don't mind a dark church. Things that are necessary like heating and efficient energy use are important, but let's prioritize safety issues first, and put a band-aid on the parking lot.
26. If education facility improvements are a safety issue for our children, then it should be done automatically and it doesn't need to be discussed. Just fix it.
27. An endowment is the only thing that is going to protect our school. Parents are already over extending themselves to cover tuition.
28. I don't see the plaza being used all that much.

29. Everything on the list is important, but I don't think we will draw people to the church by changing the look of a building. I didn't see anything in the case about a chapel. We should be improving the Eucharistic chapel. The school building is not safe, nor is it ADA compliant. Tuition is high. Something must be done. If parents saw the windows being repaired, they would increase their gifts. People are putting \$20 a month into the collection and that is just not enough.
30. I was hoping for a little more focus and to see a prioritized needs' list. Some things are just wish list things. I would rather have a bulleted list of specific items than these categories of 'project's major parts.' Here's how I would do it: In the parish hall, number one is: the restrooms are falling apart. They are absolutely disgusting. Number two, a piece of the hall is falling away. When discussing the piazza, the unevenness of the concrete is extremely important in itself. (Now, code compliance issues will be rolled into other projects, and need not be addressed by themselves.) The top priority for the church should be windows, and number two, the kneelers. For the educational facilities, the number one priority should be eliminating the separation of classrooms, and number two the restrooms. Having such an open campus is a terrible, terrible problem and our young people are not protected. We will be hitting the headlines again, and for all the wrong reasons. Unsavory characters wander on to this campus too frequently. Under the category of parish grounds, the number one priority should be to address how dark it is at night. And under endowments, the number one priority should be tuition assistance.
31. Please prioritize the needs for us. The school is first. The church is in very good shape; it just needs a face list. I would rather see funds go to lights at night. We should use motion sensors. Do we have good liability insurance? Are parents who send their children to our school aware of its shortcomings? We are surrounded by liabilities.
32. The parking lot is too open for children, who wander. They're our future parishioners: the children. There is the future of our church.
33. The hall is important because it is used by so many groups. Every part of it is noticeably sad and in need of repair.
34. I don't believe the hall should be used as a gym. It wasn't designed for that. They need better air in the church. And we do need better lighting in church for old people who have trouble seeing.
35. These are tough times. We are losing people because of the conditions in the hall and school. People sometimes don't look beyond the buildings to see the vision of our education. People see those bathrooms and they leave.
36. An endowment will help a lot in the future. Why haven't we done one to this point?
37. I hope we get more cost estimates. We need to be prudent stewards of our finances and select the best contractors for the best price, using the proper balance of quality and cost.
38. Theoretically, an endowment is important, but I don't see that happening. This is a wish list.

39. You have to prioritize. Where is the need the greatest? You can only defer maintenance for so long. The ventilation, heating, sanitation and acoustics are less than ideal. We sit close to two faults here. An earthquake in the school building? I wonder if anything would survive.
40. Restrooms are important, and the overhang is important. For the rest, they ought to be able to make do. I am not worried about un-tempered windows. We have gone many years without earthquakes. You would have to have a really strong earthquake for windows to break out. Parts of this proposed campaign are important, and parts are not. I would have to break it down differently.
41. Although the plaza is not at all important, the pavement IS a tripping hazard and I worry. Certain parts of each component are important and others are not. Forget replacing the hall floor, for example. Do what is needed and not what is aesthetically pleasing. It is a waste of money to do kneelers compared to the safety issues.
42. You don't own a house and let it fall apart.
43. Safety and the things that need to be fixed need to come first.
44. Projects range from essential to "nice to do" (e.g. landscaping, plaza). Some repairs/retrofits are essential. Beautification projects (largely plaza area) won't bring back the droves of parishioners who have left the parish over the last decade. The school is the most important. A revitalized hall could bring income to the parish through increased outside rentals.
45. I'm more likely to give if I can visualize where it is going.
46. It is important to address safety issues, but it is too expensive to do other improvements at this time of economic stress. I know there are other retired people in the parish who are living with no income, only savings and praying that the money lasts as long as they do. Other families are having difficulties raising children and managing households in this economy. It is a hard time to ask for \$10 million over three years. Only safety issues should be addressed. How could we estimate what the other 1,799 households are willing to give? Good luck!
47. The plaza is nice the way it is, and the church is fine the way it is! How about fundraisers like bingo? How about 2 or 3-day festivals? These have been used in the "long ago" and are what raised funds for our new church and school. My husband was chairman for several festivals along with many parishioners that helped each year, as well as being one of the many who gave their Friday evening for running the bingo games.
48. The categories provided are too broad for simple answers. We need more financial estimates by bracket and category of work. Estimate, earmark size for endowment. The scope should be more realistic re: safety and ADA items prioritized vs. replacing all church windows because some can't be opened and closed.
49. Many of the proposed improvements are purely aesthetic and not necessary! People will attend OLL whether the vestibules are attractive or not, or whether the stations are spotlighted or not. Also, our administrator should enforce use facility fees for all groups not associated with our church, which would help raise maintenance fees. In terms of importance, the church comes first, then the education facility improvements, hall, plaza, parish grounds and, lastly, parish endowments.

50. Prioritize individual items as opposed to the six major areas. Upon doing so, establish those of a safety nature and submit it to the parishioners for comment. Reduce on the final report the emphasis on welcoming environments, aesthetics and attractiveness. These are negatives and opinions.
51. I think the hall should be replaced, not refurbished. It was outdated when it was originally built. More often than not, it is cheaper to replace than to repair and update.
52. The most pressing need that I recognized in the campaign statement is that OLL has an "immediate need" for an ongoing maintenance and pre-maintenance function. This need should be somehow isolated from the time line campaign priorities. Somebody, or a time and material costing contractor, has to be engaged now to approach the safety aspects connected with existing electrical and plumbing problems and, secondly, with on-going maintenance and repair. The "Statement" should provide some "new approach" for a plan B, pay-as-we-go approach to funding both the immediate needs and subsequently the other perfunctory requirements. In reality, the nation is in the midst of an economic downturn and will remain so for some time to come. Therefore establishing a 3 year, \$10 million dollar goal may be plausible to your financial consultants, but wrought with problems for the signatories of a 3-year pledge as well as the shakers who will have to go out and rattle the trees for the money. Money doesn't grow on trees. If it did, smart birds would get it all.
53. People will pay for value and a clear concept. Have a good plan first. I would support: 1) a new school; 2) turn the existing school into a parish center; 3) remodel or even rebuild the hall. Think about naming rights for the rooms, etc. on 1, 2 and 3 above.
54. This is a cafeteria plan. Items need to be vetted. I am having a hard time with the survey process. We don't have enough information to answer these questions.
55. We need to make a case for more than maintenance issues. The one place everyone agrees needs fixing is the hall.
56. I brought a relative to a parish event and she commented how shabby the conditions of the bathrooms in the hall are.
57. The wish list needs to be more specific and be prioritized for us. I'd like to have a prettier church, but safety must come first.
58. Who was Father Farell? That is a bad name for our hall.
59. How needed are capital improvements? We should divide this whole process in two: get on with maintenance and repairs, and not confuse it with new building projects. I feel we need to make a distinction between maintenance and repairs and capital improvements.
60. Who is Father Charles Farell?
61. I don't care about the carpet in the church when we have items not up to code in the school. Our restrooms are a fright. The windows are broken. And the windows are unsafe glass. We have structural problems with the overhang in the school. And the fire alarms not being wired into the fire station should be corrected immediately. We need fire sprinklers.
62. We should start with the most immediate problem and attack that, and then do the less critical items.

63. It is a bad idea to name our piazza Good Shepherd because that is the Lutheran church down the street! And they just opened a middle school in direct competition with our parish school.
64. I don't know who Father Farell was. You would have to have been here a long time to know.
65. Can we pick something more current to name the hall? Something that has meaning?
66. It would be great to name the hall after a major donor instead of the tongue twister Father Farell Hall. I've never heard of Father Farell, and it is not meaningful to the people today. It is not an uplifting name. We need something more current and sunshiny. 'Good Shepherd' is not a good name for the plaza.
67. Are having endowments realistic?
68. I had no idea of the safety issues present in the school. It certainly would have influenced my decision to enroll a student here. An earthquake IS going to happen in California. It is just a matter of when.
69. I am very glad that safety improvements are being looked at. It has to be a priority.
70. We can't do everything at once. Let's prioritize. I think the school should be first. And I didn't see anything in there about the rectory.
71. Why is it a big deal that students have to cross a parking lot to reach the portable classrooms? Every school in California has modular buildings.
72. The hall is the first and foremost issue we need to address.
73. The focus should be on necessary improvements and maintenance, not aesthetics.
74. Regular maintenance and regular improvements should have been taken years ago.
75. The endowments should have been created long ago.
76. To allow such disrepair to build up and continue is and was irresponsible. Was this only considered when the wonderful parishioner passed recently leaving large funds to St. Vincent de Paul? A plan at least allows for parts to be completed as funds become available. Anything about the convent/Keane Care/computer lab? I know there have been proposals to address some of these issues, and the parish did not take advantage of them over the years.
77. Do not try to do all of the projects at the same time. Homeowners don't. Spread the projects out over a longer period of time – 10 years. (Actually, these projects should have been started 10 years ago.) Start with the most important project and work down.
78. Set priorities. The school and hall improvements would gather the greatest support from the parent and church community.
79. We need two plans: short range (i.e. painting), long-range (re-roofing, furnace replacement). Keep parishioners informed. Safety issues must be first priority.
80. Differentiate between "needs" & "wants/desires"; prioritize and focus on basic needs in initial campaign; provide cost estimates, preliminary designs, estimates and timetables.

### **Campaign Awareness/Acceptance:**

1. We can't meet the monetary assessment for the Archdiocesan Appeal.
2. This parish can't make their AAA assessment. What do you think?
3. We have delayed long enough. If we delay starting now, we will never start. And yet, I hear an element of people who don't feel it is their responsibility to contribute.
4. I see lots of competition for funds within the parish for many needs.
5. These are difficult times. I can't imagine how people will be able to donate at the levels needed.
6. I'm so very pessimistic about the younger generation contributing like the older generation did.
7. I think the timing is poor for a capital campaign because of the economy and high gas prices. Would people be willing to support it? A lot of young families can't contribute. I don't think the older parishioners will see some of the project components as worthy. People don't embrace the idea of tithing in this parish, in general. We have a larger task and that is fostering a better understanding of stewardship.
8. It is going to be the same people who contribute now. We can never reach our assessment for the Archdiocesan Appeal; how will we reach these campaign goals?
9. I have a lot of anxiety around a campaign. I am concerned about the lack of community feeling. People complain an awful lot here, but they do nothing to improve things.
10. There's an underlying feeling in the church that the city of Novato is becoming more Hispanic. White people are reluctant to donate when they think it may be serving the poorer elements of the parish.
11. It is never a good time to ask for donations, but the parish would be seeking funds when many families are struggling.
12. A campaign is set up to fail. We have had no leadership from the top for 30 years. The economy is hurting, real estate is poor; this couldn't be coming at a worse time.
13. With the economy as it is, it will be difficult. Timing is tough. Prices are horrible.
14. It is much more doable if you give us specific numbers for individual projects. For example, what does a handicapped accessible restroom cost?
15. If we could meet our goals for the AAA, we could celebrate that, and then say, "Now we can do this." Every Sunday we hear how we haven't made it. It gives people the impression: "will they ever stop talking about money?" Let's finish one thing, and let us feel successful, and that will empower us to create an even greater miracle.
16. \$10 million is just not going to happen. We have to live within a budget in our home, and the parish needs to do that, too. Get a grip! What does God say? ASK and you will receive. Unless we know about the need, we can't come forward to help.
17. What we raise will depend on how we sell it.
18. People are really hesitant to part with their money. Jesus was right when He said how hard it is for a rich man to get into heaven.
19. I am pleased that this is taking place. WHY wasn't there an appeal before?

**Other:**

1. There are so many fallen-away Catholics! You know if we could work to bring them back to the church, it would generate revenue as well.
2. What true thought has been given to merging venues and activities with St. Anthony Parish?
3. Wasn't this survey supposed to be about combining this parish with St. Anthony's? The parish is losing people. So aren't we going to be closing down one of the two? Can the archdiocese support both of these parishes?
4. We can't even meet our AAA goal. How can we do this?
5. You need to allow people to earmark their donations to a specific purpose.
6. We need naming opportunities. That is just the way it goes. If you want to raise real money, you have to have naming opportunities.
7. We need a team of knowledgeable people who can help parishioners as they age to look at options for contributing to endowment funds. We should have a series of lectures for seniors, to throw a hook out there to encourage estate gifts.
8. People should be encouraged to consider charitable remainder trusts. It is never mentioned around here and it should be.
9. Some people won't give because of a personality conflict with a given person, and that is not right. No matter who is running the parish, we should be giving to God, NOT to a personality.
10. It needs to be driven by a grass roots team involving networking and branching out. The community network needs to be built up. I can't stress enough the reaching out this parish needs to do. We need to have planned, sustained efforts to grow the community.
11. We need to reach our alumni and invite them to support this financially.
12. Places of assembly of a decent size in this county are at a premium. The focus should be on necessary improvements and maintenance, not aesthetics.
13. We need to teach our community that this is just one more operation that doesn't operate on 'good will'. The church gives. People need to give back.
14. We have few facilities in Novato the size of our hall, and they manage it wrong. It gets left trashed; deposits are given back when they shouldn't be. If people aren't going to give money, let's find a way to make money: manage the hall rental better.
15. We can't keep playing catch-up. People in the parish can be very difficult. People are so critical. Recruiting volunteers here is difficult. People may help, but they are unwilling to lead. Certain ethnic groups don't want to integrate.
16. People think of the church more as an institution that exists to serve THEM. They come here to get their ticket punched.
17. A bad economy brings out a lot of negative energy in other areas of people's lives. When the economy is thriving, and things are rolling along at home, much more rolls off people's backs.
18. Why can't a group of dads fix things for free?

19. Demographics have changed over the years. We need to have Hispanic people on our leadership team. They are wonderful people, devout and devoted. They will give, and you know it hurts.
20. This place is not handicap accessible.
21. We need to try to save money. I am upset that the school gets first crack at using the hall.
22. Other charities will get money before this because I know where it is going and what they will do with it.
23. Patrick Reeder is great at getting things done.
24. Although we have 1,800 households, we know a much smaller number actually participate. The funds will have to come from those who are active now.
25. You can contribute now using your credit cards. They never mention it. That is a grave mistake.
26. We didn't even know the hall is used every day of the week! I heard a rumor that the parish isn't big on trying to rent it out. It would be a good supply of income. We could be selective on who we rent it out to, of course. Doing the hall first is important since it could be used more for paying events, using a proper fee schedule.
27. People like to see their names somewhere. It is very effective.
28. The church really needs to stress: it doesn't matter what size gift you give. It matters that everyone participates. No one will be thought of less. We need to make people feel special for their gifts.
29. I think people should consider their wills and testaments.
30. This parish needs serious help in fundraising. They are not doing what they need to do in asking us for money. We have no idea of the finances of this parish. We should get a stewardship report mailed to our home annually.
31. What will people get? I would like to see a plaque with people's names on it. It tells us that these families take pride in their community.
32. Economic times are good for considering charitable remainder trusts.
33. Perhaps they could separate out small goals. When we reach a certain sum, this gets done. We should take advantage of the skilled craftsmen and service providers in the parish.
34. The church is the hub of our facilities, but the school is of number one importance.
35. Can you add information to the website regarding how to make estate gifts to my parish? What about information on what the archdiocese offers to us? Look at our parish website compared to others. It's like night and day. Thank goodness we finally put the bulletin on-line.
36. If according to your letter dated 6-11-08, one third of people who attend Mass on Sunday do so in Spanish, then that community must accept more of the financial responsibility for running and maintaining the parish.
37. We need to have some numbers before we commit financially.

38. It may be worthwhile to consider efforts to attract more parishioners to the parish, especially among “lapsed” Catholics who may not be contributing correctly.
39. Civic groups and other groups outside the parish community that use the parish hall should be solicited for contributions to the campaign.
40. As a family, we have been attending St. Anthony’s. Best of luck to you in your fundraising needs. Sorry we will not be able to participate.
41. This is a difficult time economically for many. Even though we are retired, we are helping out our children and supplementing for our grandchildren.
42. In the past, everything donated to the building fund was sent to other needy parishes. That discourages giving.
43. The Knights of Columbus may be very helpful.
44. While we understand the needs, our income is now very limited and we know so many others are “hurting”.
45. Since there is a charge for using the parish hall, couldn’t that money be used toward the cost of improvements?
46. Have any of the following been considered or pursued: grants, applications to foundations, corporations, contact with building programs, e.g. “This Old House”, restricted contributions for specific items e.g. windows, kneelers, etc. with a plaque acknowledging those kind of donors?
47. Make a stronger effort to include OLL in wills.
48. I no longer attend regular Mass at OLL, partly because of all the whining about costs. A successful parish has as much to do with the pastor’s relationship with his members. I never found acceptance with the current priest.
49. I attended fundraisers for Camp Okizu—lots of work, easier to get donations for kids with cancer than for a local church, but perhaps some good ideas to model. Auctions, lobster feed, etc.
50. Although I know it never hurts to ask, and people will always give to the best of their abilities, our economy and families are struggling greatly. To ignore these struggles is insensitive. To act as if it is not happening is insulting.
51. A big worry: timing is bad. Ten years ago things should have been repaired and no dollars were put aside in a “kitty” all these years as far as I am aware?! Too many people are not in good financial shape. Inflation, gas prices, etc. are not so encouraging. There are negative feelings from a lot of our members. Family needs will come first.
52. I suggest holding fundraisers, e.g., a rummage sale, bake sale, bazaar. In the past they have been well attended and made money. Do not count the 1,800 families in our parish since only 500 families support the church or donate any of their time. It is ridiculous to say that there are 1,800 families. Also, many of our parishioners go to St. Anthony’s.
53. Timing is important, and a lot of people are feeling the effects of the current economic challenges and high gas prices. Our congregation is getting older and grayer and fewer. More are on fixed retirement incomes.
54. It is important to stress that all donations would be for OLL only, not given to the archdiocese.

55. We have been pushed regarding the Archbishop's Appeal. Times are hard. I think that if you can't give money, maybe you can give time. Have us help. Many people wanted to help and change things but were systematically shut down.
56. Consider a five year campaign.
57. I hope any work done will go out to bid (by responsible contractors) and that union labor will be used for electrical and construction upgrades. I will not provide capital for non-union work.
58. The church is only full at Christmas/Easter/some funerals. Divide the back off to save energy, etc. Renting out the hall would be a great source of income (after renovation, of course) wedding receptions, etc. I think St. Anthony's should help support their Novato Catholic school, even though it is in OLL parish. One promising source of funds would be bequests. Our parishioners are aging and many are wealthy.
59. There are a lot of retirees who are on limited income. Hopefully common sense will dictate how much each one can afford to contribute to this important cause.
60. Consider closing St. Anthony's and consolidate/move their parish members and resources to OLL. Renovate the parish hall sufficiently to make it attractive for use by parish and community for events—try to make it into a positive cash flow hall for all occasions. Ask parishioners who can provide materials and labors to accomplish. It is a poor economy for people to donate.
61. The timing is probably the worst it could be for at least 65 percent of the parish community.
62. At this time, my future financial commitments are uncertain. Too bad that everything was neglected. The timing is very bad.
63. Keep in mind most people are buried in gas, housing, etc. spiraling costs.
64. Prioritize and pay as you go.
65. Ask people for pledges one year at a time.
66. Many parishioners are capable of donating skills and services to take care of much of the needs. Draw on this fact.
67. Be careful that recommended solutions are in the best interest of the church, not in the best interest of fundraisers.
68. Consider a thrift shop.
69. Many people wanted to help and change things but were systematically shut down. We have been pushed regarding the Archbishop's Appeal. Times are hard. I think that if you can't give money, maybe you can give time. Have us help.
70. General note: It is hard to consider this request for money given the large amounts of money paid out by dioceses in California for molestation cases. We had two instances of molestation in our parish. Can OLL apply for Archdiocesan Appeal money? The parish has paid into this for years. It is time to get some back.
71. It is very important to keep the church grounds neat – all papers picked up, recyclable containers for plastic and glass bottles used during functions, etc.
72. If we had kept up with improvements and repairs, it wouldn't all have come at once. We need work done more often.

73. Thank you for allowing input and information.
74. I know Fr. McCain does not want to use “free” help from within, but I really do not see how else a project of this size could ever get accomplished. They could hire a general contractor who could oversee volunteers. Ask for discounts on materials, such as carpets, flooring, lumber, etc. – that could be their gifts.
75. This is important but be realistic about it. \$10 million is a lot of money to come up with in three years.
76. How do you expect to get \$10 million when you can’t get \$98,000 for AAA each year? It took three years for us to get enough money from the parish golf tournaments to hire a youth director. I am worried about paying him in the future. If our money had been planned properly, so much of each week’s offering should have been put aside for repairs and maintenance. These repairs should have been done when needed. Now Father and the Parish Council throw us a curve and ask us to come up with \$10 million in three years. Rome wasn’t built in a day, or even three years. I think there are too many people working in the rectory. Why do we need a parish administrator when Father makes all the decisions anyway? And isn’t that Father’s job? And why do we need a full time accountant? Wouldn’t part-time do?
77. Address individual needs separately. You might get a better response. Re: church doors: ask for parishioners’ help with some projects – like painting, lighting and gardening. Why pay a company for this survey when it could be done in-parish?
78. It would be helpful to separate fundraising for the church from that of the school.
79. The difficulty in raising the Archbishop’s Annual Appeal money suggests that even raising \$1-2 million would be optimistic. I would consider a “gift” (when and how much depending on our circumstances) but not a “pledge”. Our retirement income will not increase, but our medical expenses probably will.
80. This community is now an aging community. Most of the people who give now have probably been giving for 40-50 years. Some probably are responsible for the plant we see now. I am not sure how well the members who are younger could work a pledge into their budgets even if the economy starts rebounding. If this were the Midwest or East Coast, you would see probably 50 percent of the community giving. The West Coast only has 25 percent of membership giving. Those were the stats the last time when we were looking at a stewardship campaign.
81. I agree in safety particularly--\$10 million is a lot to expect, given the current economy and number of retirees in the parish. We need a miracle!
82. OLL hasn't met its AAA assessment in years, despite the fact that \$96,000 divided by 500 families who regularly attend Mass = \$192/family/year, or less than \$4 a week.
83. Today's Students, Tomorrow's Leaders Campaign - after 5 years, OLL still owes \$100,000 of a \$213,000 commitment. The Annual Youth Program and Golf Tournament raise about \$30,000 a year, but that may not be enough to support the program.
84. Annual Fund Raising for Knights of Columbus, Helping Hands, and St Vincent de Paul - Good causes which are popular in part because the parish or the archdiocese has no control on how the money is spent.
85. OLL holds school fundraisers - parents already have a heavy tuition burden.

86. Get realistic on the financial goal. ... \$10 million is delusional.
87. This is a difficult time period for people—depression, politically uncertain time and the war—for us it's our age and I'm wondering about our old age difficulties and our need for help and getting about without outside help.
88. Take into consideration the number of families that are retired or single headed; also, what the whole economic picture of our country will be, because most retired people live on investments which are very flexible these days.
89. I think all of this is extremely important! I am a senior on a very limited income and large expenses. I just hope I don't have to move to make both ends meet.
90. If some of the parishioners who are much more capable of donating than the rest of us would give, the goal would be able to be reached much more easily.
91. It would benefit the parish and promote parish cohesiveness in this campaign if all parishioners worked and worshipped together. As it is now, there are separate programs and services that tend to divide rather than unite all in a common cause and common goal.
92. With the Archdiocesan Appeal and economic issues facing the community and the nation, a \$10 million improvement plan seems unrealistic. Perhaps improvements should be prioritized one need at a time over a three year period.
93. I think small fundraisers—bake sales, car washes, rummage sales, maybe a concert where you pay to get in—wouldn't be such a big hit at once to donate. They could help, but I know they need a significant amount of money to make improvements.
94. Aside from cash donations, you might consider other means to raise cash such as bake sales, a flea market, bingo, poker nights, fairs, etc.
95. It's very poor timing for this project. No time is perfect. But this is unbelievable. Maybe one thing at a time, slowly.
96. Address safety and critical uses first.

**SECTION D**  
**CONCLUSIONS**

## **CONCLUSIONS**

### **A. SATISFACTION WITH THE PARISH**

The level of satisfaction with Our Lady of Loretto Catholic Church is fairly high, with 86% of those interviewed and 85% of survey respondents overall saying they were either satisfied or very satisfied with your parish and the programs and services that you currently provide. People are especially pleased with recent improvements that they have seen particularly in the areas of youth ministry and in your liturgies. And while dissatisfaction expressed was minimal, some concern was expressed about the way decisions appear to be made in the parish, the decline in membership and loss of members to St. Anthony's, and the perception that many factions of the parish (such as older and newer members and people of different ethnic backgrounds) don't support the parish to the same extent and don't have ample opportunities to get to know one another or mix. Some of these concerns, however, are and will continue to be effectively addressed, at least in part, through the facility improvements you have planned as well as through the conduct of this study and the successful implementation of your planned capital campaign, which will serve to revitalize your parish in many ways.

### **B. PROJECT AWARENESS AND ACCEPTANCE**

76% of individual interview participants and 62% of survey respondents overall felt that they were either well informed or had a general knowledge of your needs. Many people indicated that this study, and the educational effort that was part of it, played a major role in helping people to better understand the depth of the parish's needs. This is positive and will aid in the success of your campaign.

Acceptance for the proposed project overall was also very high. In fact, 100% of those personally interviewed, and 90% of survey respondents overall, felt that addressing the needs as expressed was important or very important. Many people made comments to the effect, too, that

“these improvements have been needed for years” and that “it’s about time that something is going to be done.” At the same time, however, many feel that the project overall needs to be prioritized and phased and that some of what is being proposed, even under the most accepted parts of your plans, were more “nice to do’s” than “necessities”. They also expressed very clearly that they felt that critical safety and maintenance issues should be addressed first.

We also assessed acceptance for the proposed project’s major components and found that all but two were viewed as important or very important by a majority of those we heard from or interviewed.

Rated the highest priorities by far among all survey respondents were your expressed needs and proposed plans for improving your existing education and parish hall facilities. Both were seen as important or very important by 90% of those we heard from or spoke to. Among those personally interviewed, proposed improvements to your educational facility were seen as having the highest priority with proposed improvements to the parish hall viewed as the second most important thing to do. Among mail survey respondents, the exact opposite was true with more people seeing and saying that proposed improvements to the parish hall outweighed the importance of the educational facility enhancements proposed. Nonetheless, these two parts of the project were seen as much more important than everything else you have planned and proposed to do.

In fact, rated a distant second and third highest priority among your needs were the worship space improvements that you have proposed and the establishment of parish endowment funds. In fact, 68% and 66% of the people we heard from or spoke to rated these components of your plan as important or very important to do respectively. Many feel, however, that enhancements to your worship space could wait, and that while the idea of having and expanding parish and educational endowments is great, there are more pressing priorities at the present time.

Finally, improving your parish grounds and the parish plaza/piazza in the manners expressed were viewed as important or very important to address by fewer than half of both the people we received mail survey responses from and those that we personally interviewed. Only 47% of all survey respondents and 37% of individual interview respondents saw these as important or very important at this time. What seemed to be an exception to this, however, were your proposed plans to improve the lighting of the parish grounds, which many see as a safety and security issue and therefore, a line item priority.

So, in summary, while there was strong support for your proposed project overall, the proposed enhancements to your education and parish hall facilities and addressing other safety, security and critical maintenance issues were viewed as clear priorities.

### **C. CAMPAIGN AWARENESS AND ACCEPTANCE**

Awareness about your impending fundraising effort was not as high as the awareness of your proposed project needs and plans. Many readily admitted that they had assumed that some sort of campaign would need to be done, but only 45% of survey respondents indicated that they knew for sure that a formal campaign was being considered or planned.

Perceived acceptance for such an effort was also a bit pessimistic with most survey respondents (55%) saying they felt acceptance for such an effort among members would be “fair.” The proposed timing of the effort and the current state of the economy were the main reasons for this sentiment. Keep in mind, though, that a capital campaign typically evolves and involves pledges over three years during which time economic conditions tend to change. So even if people are not able to participate to the extent that they otherwise might right away, that isn’t to say that they won’t be able to participate at a later time when their personal situation or the local and national economic conditions change. It’s also important to keep in mind that in more challenging economic times, certain things like interest rates tend to be a little more

favorable, which could be a benefit to you. And also keep in mind that waiting can also be costly, not only because building and remodeling costs are increasing at the rate of 8% to 10% per year, but also because many members expressed frustration with the parish's deteriorating facilities and a desire to get on with the improvements planned, which can help to attract people to the parish and may, in your case, help prevent people from leaving.

It's also important to note that 88% percent of the people we heard from or spoke to believe that acceptance for such an effort would be "fair" to "good" depending on what is ultimately presented as the project you are raising funds for. Finally, support for the campaign effort was further evidenced by the fact 96% of all survey respondents said they would either make or consider gifts, which is especially high and encouraging.

#### **D. COMPETITION FOR FUNDS**

A majority of those that we heard from or spoke to (84%) knew of no other campaigns that were either in progress or planned that they felt would adversely affect people's willingness or ability to support your proposed campaign effort at Our Lady of Loretto Catholic Church. Even projects that were mentioned multiple times as potential conflicts, which included a capital campaign for Marin High School, the Archdiocesan Annual Appeal, a campaign for a new wing at Sutter Novato Community Hospital and various other charities, will not have a significant or widespread detrimental effect on people's willingness and/or ability to support your planned fundraising effort at Our Lady of Loretto, at least from ours and others point of view.

#### **E. VOLUNTEER AND VOLUNTEER LEADERSHIP POTENTIAL**

Campaigns of this nature are not only volunteer intensive, they're volunteer dependent. Consequently, it is essential to have ample, able and willingly available volunteers and volunteer leadership for a successful campaign. Ideally, you should have one volunteer for every five or six

households or prospective donors. In your case, with roughly 1,800 households, this translates into a need for up to 300 volunteers, ideally. Approximately 20% of these, or 60 people and ideally couples, would be needed to serve in key leadership capacities enlisting, soliciting and supervising other volunteers and volunteer leaders. And, as a general rule of thumb, you should have at least two candidates for every volunteer (leadership) position that needs to be filled. For your church, this means you should have a pool of at least 120 key leadership candidates to assure that these key positions are filled. During the course of our interviews, 60 different individuals or couples were named among the best possible leaders for a campaign, which is less than the ideal pool of qualified candidates that we would ideally need and like to see. This could indicate that you may struggle in getting the ideal quantity of people involved, which is not all that uncommon today for a parish of your size.

Willingness to work on the campaign, especially in a leadership role, is also critical to your success and something that we also assessed. And the study shows that 32% of those individually interviewed (who are presumably some of the most active and generous people in your parish now) indicated a willingness to a campaign leadership role if offered or asked, which approximates the typical one-out-of-three willingness-to-lead response that we typically and ideally like to see. Increasingly encouraging is the fact that of the 22 individuals or couples recommended multiple times as the best to lead your campaign, we interviewed 10 of these and 5 of the 10, or 50%, said that they might consider or accept a campaign leadership position if asked. This is significant in that campaigns of this nature tend to have a bandwagon effect with people wanting but sometimes waiting to get involved until those they know and respect most already have. Of some concern, however, is that fact that of the 7 individuals or couples recommended five or more times as the best to lead your campaign, we interviewed 5 of these, and only 2 of the 5, or 40%, said that they would or might consider campaign leadership roles if asked. This must change and key leaders of the parish must be communicated with and convinced that their

involvement, in addition to not taking an extensive and extended amount of their time, is absolutely critical if your parish and campaign is to realize its potential.

Additionally, it was encouraging to note that 67% of survey respondents said that they would or might work on the campaign in some capacity if asked, which is a little better than the one-out-of-two willingness-to-work response that we typically and ideally like to see.

So, in summary, your prospects for getting both the quality and quantity of volunteers and volunteer leaders that you would need for a successful campaign looks fairly promising at the present time.

## **F. FINANCIAL POTENTIAL**

A number of considerations are used to determine financial potential. All of the previously discussed criteria – satisfaction with the church, acceptance of the proposed project and campaign, competition for funds, and leadership potential – are major considerations.

Another important criterion in estimating financial potential is the opinion of the church members themselves, since experience, for the most part, shows that people tend to perform at the level they think they are capable of and rarely above. And the study shows that a majority of those interviewed (59%) believe that at least \$2,000,000 can realistically be raised over a three-year pledge period for your planned campaign.

We also look at prospects for pacesetting gifts in evaluating your financial potential. To reach your capability in a fundraising effort in a parish of your size, you normally need and ideally will receive one gift equal to at least 10% or more of your goal. Furthermore, you should have at least three prospective contributors rated as capable of making the top gift that you need. In your case, with a \$10 million project, that means you would need at least three prospective donors consistently rated as capable of contributing at least \$1,000,000 or more to your planned campaign. During the course of our interviews, however, we found only one individual or couple that was

rated as capable of such a gift. Another individual or couple was rated as capable of a \$250,000 gift if they were so inclined. And there was a third individual or couple that was consistently rated as capable of contributing at least \$60,000 to your campaign. The average rated gift potential of these top three prospects for gifts amounts to roughly \$440,000. This would indicate a potential for raising \$4,440,000 in your campaign under this financial formula.

We also looked at the top gifts that your people expressed a willingness to consider or make in evaluating your financial potential. And during the course of our interviews, there were two individuals or couples that said they would or might consider gifts of at least \$30,000 and another who said they would or might consider at least a \$25,000 gift. If combined, these top gifts would equate to one \$85,000 gift at least, which would indicate a potential for raising at least \$850,000 under the previously mentioned financial formula.

And finally, one of the best barometers of financial potential is current giving. Normally, a parish should be able to raise at least two and a half times its annual adult envelope offerings in a well run and received campaign. And records show that approximately \$606,000 in such income has been recently received. This would indicate a potential for raising at least \$1,515,000 for your campaign under this financial formula.

The average of the aforementioned indicators amounts to \$2,201,250. Consequently, and in light of all other factors considered, we believe that you have the capability to raise *a minimum* of \$2,200,000 over a three-year period in your planned campaign.

**SECTION E**  
**RECOMMENDATIONS**

## RECOMMENDATIONS

1. That you consider completing the project and/or the fundraising for it in two or more phases based on what people want, will support and to what extent as well as what seems to make the most practical sense. From the feedback we received, it would be logical, then, to focus phase one of your fundraising efforts on raising what is needed to start and ideally pay for and complete the planned improvements to your educational and parish hall facilities, especially those items within these facilities and other parts of your plan that relate to addressing your most serious safety, security and maintenance concerns. Additional, subsequent or separate fundraising efforts could then be organized and ensue, which would enable you to pursue and address your remaining needs such as work in or on your church, the establishment and expansion of your parish endowments and planned improvements to the parish plaza/piazza and grounds.
2. That you begin the planning and organizational work for your capital campaign as soon as possible and ideally right away so that your campaign can be completed by as early as mid-December. This will also enable you to take advantage of the relatively high levels of satisfaction with the church, the high level of awareness of acceptance for the proposed project and some of its most popular and core components, and the low level of competition for philanthropic funds that currently exists. Finally, it will also allow you to capitalize on the momentum gained for the project and campaign through the conduct of this study before enthusiasm starts to wane.
3. That you consider having us break out, organize and conduct a special and separate Pacesetting Gift Phase for your campaign where we would devote extra time to seeking and securing significant lead gifts first and apart from the more traditional Advance and Community Gifts phases of a church campaign where these more significant gifts would typically be solicited in. Significant lead (or the top ten to fifteen campaign) gifts should provide up to 40% or more of your overall goal and more than any other gifts will determine the degree of your (or any) campaign's success. And these types of substantial lead gifts, which can help you to achieve more of your potential, does, in fact, exist in your church, but the willingness to give them currently doesn't. Consequently, we believe that you could benefit from having additional time for cultivating and closing these few key gifts that are

and will be so critical to a larger campaign's success. In fact, when recommended and done in other churches we have worked with, it has resulted in raising an additional one times a church's annual income. So even though adding a Pacesetting Gifts Phase would add slightly to the campaign's cost, it also has the potential to significantly enhance your campaign's results far beyond any additional expense. In short, it has the potential to be a very practical and worthwhile investment. If you elect to implement this suggestion, we recommend that this more private, quiet and non-public phase of the campaign be implemented this fall and that the rest of the campaign be conducted in the early winter culminating by or before Easter.

4. That you establish a minimum goal of \$2.2 to \$2.7 million for the (initial phase of) the campaign effort, which is consistent with what we believe you can realistically expect to minimally raise, the latter of which would only be advisable if the recommendation previously made is heeded. We also suggest that additional, higher goals be set, which will enable you to complete more of the project and/or to minimize debt and will keep people from becoming complacent once the minimum goal is met.
5. That a three-year pledge period be adopted for this and the subsequent phase(s) of the campaign.
6. That you provide more details about your needs and plans and obtain and include updated, conservative cost estimates for each major element of your plan in all project and campaign communications going forward. Some sort of architectural drawings or conceptual renderings of the spaces and places to be improved would also be helpful in prompting excitement about as well as a better understanding of your plans.
7. That you reconsider naming the parish hall and the plaza/piazza as currently promoted and planned and allow others, and in particular key donors, to designate their gifts to these and other parts of your improved facilities and to dedicate these items or areas in honor or memory of those they choose. This will help to inspire far larger gifts than you otherwise might be able to get.
8. That you recognize gifts – big and all – in an equally visible way such as an attractive “donor wall” where all donors to the campaign would have their names listed alphabetically within.

9. That you begin to develop responses to some of the other most commonly raised questions, concerns and suggestions that surfaced as a part of this study, which will then need to be incorporated into the final case statement, campaign literature and a question and answer sheet that should be used prior to and as part of the formal conduct of your campaign.
10. That you initiate and implement within three to nine months after the campaign ends, a more formal, holistic and professionally run stewardship program at your church with our assistance. Such a program should have at its core a strong initial and ongoing educational component emphasizing what it means to be a Christian steward in every sense; it should be led by a sound and well-rounded, standing stewardship committee that will assure that the program is ongoing and holistic in nature; it should have a strong volunteer stewardship component that seeks to get more deeply involved in the life of your church; and it should have a strong financial stewardship component that seeks not only to expand regular weekly giving, but also, special and substantial short and long-term gifts to your church, which may help you to support any interim debt that you may incur as a result of this project and/or may enable you to finish your proposed project or more components of it sooner than might otherwise be possible.
11. That as part of the financial stewardship effort suggested that you also emphasize and educate people about the benefits of planned gifts such as gifts through a person's will by bequest, which can be especially beneficial to your benefactors as well as your church.

**SECTION F**

**SUMMARY OF INDIVIDUAL INTERVIEW RESPONSES**

## SUMMARY OF INDIVIDUAL INTERVIEW RESPONSES

A total of thirty-two (32) confidential interviews were conducted involving fifty-four (54) individuals. When two or more people were interviewed at the same time (a husband and wife, for example), individual responses were encouraged and recorded where appropriate. At times, two answers were given by an individual to a single question. For example, some may have responded that acceptance of a campaign would be "fair" to "good." In this and similar instances, two answers were recorded. In addition, there were times when a person was not able to answer or, if not appropriate or applicable, was not asked certain questions. This explains why the total number of responses does not always equal the total number of individuals interviewed.

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1. HOW SATISFIED ARE YOU WITH OUR LADY OF LORETTO CATHOLIC CHURCH AND THE PROGRAMS AND SERVICES THAT THE PARISH PROVIDES?

---

	<u>NO.</u>	<u>PERCENT</u>
VERY SATISFIED	12	23%
SATISFIED	32	63%
SOMEWHAT DISSATISFIED	06	12%
DISSATISFIED	01	02%

---

2. HOW WELL INFORMED WOULD YOU SAY THAT YOU'VE BEEN ABOUT THE CHURCH'S NEEDS AND PLANS TO PERFORM DEFERRED MAINTENANCE ON THE PROPERTY AND BEGIN ENDOWMENTS?

---

	<u>NO.</u>	<u>PERCENT</u>
WELL INFORMED	22	42%
HAVE GENERAL KNOWLEDGE	18	34%
KNOW VERY LITTLE	06	11%
UNINFORMED	07	13%

---

3. OVERALL, HOW IMPORTANT DO YOU THINK IT IS TO ADDRESS THESE NEEDS?

---

	<u>NO.</u>	<u>PERCENT</u>
VERY IMPORTANT	37	77%
IMPORTANT	11	23%
NICE TO DO	00	00%
NOT NEEDED	00	00%

---

5. INDIVIDUALLY, HOW WOULD YOU RATE ADDRESSING EACH OF THESE NEEDS AND THE PROPOSED PROJECT'S MAJOR PARTS IN TERMS OF IMPORTANCE?

---

	VERY IMPORTANT	IMPORTANT	NICE TO HAVE/DO	NOT IMPORTANT
1. Parish Hall Improvements	30/64%	14/30%	03/06%	00/00%
2. Parish Plaza/Piazza Improvements	08/16%	15/31%	17/35%	09/18%
3. Worship Space Improvements	23/48%	11/23%	09/19%	05/10%
4. Education Facility Improvements	36/86%	06/14%	00/00%	00/00%
5. Parish Grounds Improvements	12/26%	09/20%	19/41%	06/13%
6. Parish Endowments	25/54%	15/33%	06/13%	00/00%

---

5. WERE YOU AWARE THAT THE PARISH WAS CONSIDERING A MAJOR FUND RAISING CAMPAIGN TO ADDRESS THESE NEEDS?

---

	<u>NO.</u>	<u>PERCENT</u>
YES	29	57%
NO	22	43%

---

6. IN YOUR OPINION, WHAT WOULD BE THE ACCEPTANCE LEVEL AMONG PARISHIONERS FOR A FUND RAISING CAMPAIGN THAT WOULD ADDRESS THESE NEEDS?

---

	<u>NO.</u>	<u>PERCENT</u>
EXCELLENT	00	00%
GOOD	08	16%
FAIR	34	70%
POOR	07	14%

---

7. THE COST OF COMPLETING ALL THE REPAIRS IS ESTIMATED TO BE IN THE \$10 MILLION RANGE. HOW MUCH MONEY DO YOU THINK CAN REALISTICALLY BE RAISED FROM ALL PARISHIONERS AND SELECT OTHERS IN PLEDGES PAYABLE OVER THREE YEARS?

---

	<u>NO.</u>	<u>PERCENT</u>
\$10,000, 000 OR MORE	00	00%
\$9,000, 000 - \$9,999,999	00	00%
\$8,000, 000 - \$8,999,999	00	00%
\$7,000, 000 - \$7,999,999	00	00%
\$6,000,000 - \$6,999,999	02	05%
\$5,000,000 - \$5,999,999	11	25%
\$4,000,000 - \$4,999,999	01	02%
\$3,000,000 - \$3,999,999	08	18%
\$2,000,000 - \$2,999,999	08	18%
\$1,000,000 - \$1,999,999	08	18%
LESS THAN \$1,000,000	06	14%

- 
8. IN YOUR OPINION, WHO WOULD BE THE THREE TO FIVE BEST PEOPLE TO LEAD A FUND RAISING CAMPAIGN FOR OUR LADY OF LORETTO CATHOLIC CHURCH IF WE COULD GET THEM?
- 

(Names provided under separate cover.)

- 
9. IN YOUR OPINION, WHO ARE THE THREE TO FIVE PARISHIONERS WHO MIGHT BE CAPABLE OF MAKING THE LARGEST GIFTS IF THEY WERE SO INCLINED?
- 

(Names provided under separate cover.)

Every effort was made to ensure accuracy of the above listed names. If a mistake was made, please accept our sincere apologies and bring the error to our attention. Thank you.

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10. IN YOUR OPINION, WHAT INDIVIDUALS AND INSTITUTIONS OUTSIDE OF THE CHURCH COMMUNITY (E.G., FORMER MEMBERS, BUSINESSES AND ORGANIZATIONS, ETC.) MIGHT HAVE THE POTENTIAL AND WILLINGNESS TO MAKE SIGNIFICANT GIFTS?

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(Names provided under separate cover)

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11. IF A CAMPAIGN IS CONDUCTED, DO YOU THINK YOU MIGHT CONSIDER OR ACCEPT A CAMPAIGN LEADERSHIP POSITION IF ASKED?

---

	<u>NO.</u>	<u>PERCENT</u>
YES	09	17%
MAYBE	13	25%
NO	30	58%

---

12. IF NOT A LEADERSHIP POSITION, WOULD YOU WORK ON THE CAMPAIGN IN SOME OTHER CAPACITY?

---

	<u>NO.</u>	<u>PERCENT</u>
YES	46	88%
MAYBE	04	08%
NO	02	04%

---

13. IF A CAMPAIGN IS CONDUCTED, DO YOU THINK YOU WOULD MAKE A GIFT?

---

	<u>NO.</u>	<u>PERCENT</u>
YES	29	91%
MAYBE	03	09%
NO	00	00%

---

14. IF YOU WERE TO MAKE A GIFT, WHAT RANGE GIFT DO YOU THINK YOU MIGHT CONSIDER OVER A THREE YEAR PERIOD?

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All 32 individuals or couples said they would make or would consider making gifts, and 27 mentioned specific amounts or a gift range they might consider. The three highest gift ranges mentioned were \$30,000 to \$50,000; \$25,000 to \$50,000; and \$10,000 to \$50,000. One individual or couple mentioned a gift in the \$30,000 to \$40,000 range. Specified gifts ranged from a low total of \$214,800 to a high total of \$383,100.

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15. ARE YOU AWARE OF ANY OTHER CAMPAIGNS THAT ARE IN PROGRESS OR PLANNED THAT MIGHT CONFLICT WITH A CAMPAIGN FOR OUR LADY OF LORETTO CATHOLIC CHURCH?

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	<u>NO.</u>	<u>PERCENT</u>
NO	28	74%
YES	10	26%

Mentioned twice during interviews were youth ministry (although this is not outside the parish), public school needs, Sutter Novato Community Hospital's new wing, "other charities in general" and the Archdiocesan Annual Appeal. Mentioned three times was Marin Catholic High School's \$15 million campaign (\$8 million already raised), which will allow the school to replace old structures in a 14-month construction project set for 2009.

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16. DO YOU HAVE ANY OTHER COMMENTS OR SUGGESTIONS THAT YOU THINK MIGHT BE IMPORTANT OR HELPFUL TO THIS STUDY OR IN PLANNING A CAMPAIGN?

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(Comments included in Section C)

**SECTION G**  
**SUMMARY OF MAIL SURVEY RESPONSES**

## SUMMARY OF MAIL SURVEY RESPONSES

A total of one hundred fifty-one (151) surveys were returned and tabulated. In some cases, when two or more people filled out the questionnaire at the same time (a husband and wife, for example), individual responses were recorded. At times, two answers were given by an individual to a single question. For example, some may have responded that acceptance of a campaign would be "fair" to "good." In this and similar instances, two answers were recorded. In addition, there were times when a person did not answer certain questions. This explains why the total number of responses does not always equal the total number of individuals interviewed.

- 
1. HOW SATISFIED ARE YOU WITH OUR LADY OF LORETTO CATHOLIC CHURCH AND THE PROGRAMS AND SERVICES THAT THE PARISH PROVIDES?
- 

	<u>NO.</u>	<u>PERCENT</u>
VERY SATISFIED	42	30%
SATISFIED	77	54%
SOMEWHAT DISSATISFIED	17	12%
DISSATISFIED	05	04%

---

2. HOW WELL INFORMED WOULD YOU SAY THAT YOU'VE BEEN ABOUT THE CHURCH'S NEEDS AND PLANS TO PERFORM DEFERRED MAINTENANCE ON THE PROPERTY AND BEGIN ENDOWMENTS?

---

	<u>NO.</u>	<u>PERCENT</u>
WELL INFORMED	22	15%
HAVE GENERAL KNOWLEDGE	62	43%
KNOW VERY LITTLE	45	31%
UNINFORMED	16	11%

---

3. OVERALL, HOW IMPORTANT DO YOU THINK IT IS TO ADDRESS THESE NEEDS?

---

	<u>NO.</u>	<u>PERCENT</u>
VERY IMPORTANT	71	48%
IMPORTANT	58	39%
NICE TO DO	17	12%
NOT NEEDED	02	01%

---

6. INDIVIDUALLY, HOW WOULD YOU RATE ADDRESSING EACH OF THESE NEEDS AND THE PROPOSED PROJECT'S MAJOR PARTS IN TERMS OF IMPORTANCE?

---

	VERY IMPORTANT	IMPORTANT	NICE TO HAVE/DO	NOT IMPORTANT
1. Parish Hall Improvements	92/63%	39/26%	15/10%	01/01%
2. Parish Plaza/Piazza Improvements	16/11%	33/23%	80/55%	16/11%
3. Worship Space Improvements	43/30%	55/38%	38/26%	09/06%
4. Education Facility Improvements	78/53%	49/34%	16/11%	03/02%
5. Parish Grounds Improvements	17/12%	52/36%	63/43%	13/09%
6. Parish Endowments	37/28%	40/31%	45/34%	09/07%

---

5. WERE YOU AWARE THAT THE PARISH WAS CONSIDERING A MAJOR FUND RAISING CAMPAIGN TO ADDRESS THESE NEEDS?

---

	<u>NO.</u>	<u>PERCENT</u>
YES	60	40%
NO	89	60%

- 
6. IN YOUR OPINION, WHAT WOULD BE THE ACCEPTANCE LEVEL AMONG PARISHIONERS FOR A FUND RAISING CAMPAIGN THAT WOULD ADDRESS THESE NEEDS?
- 

	<u>NO.</u>	<u>PERCENT</u>
EXCELLENT	10	07%
GOOD	57	38%
FAIR	75	50%
POOR	08	05%

---

7. THE COST OF COMPLETING ALL THE REPAIRS IS ESTIMATED TO BE IN THE \$10 MILLION RANGE. HOW MUCH MONEY DO YOU THINK CAN REALISTICALLY BE RAISED FROM ALL PARISHIONERS AND SELECT OTHERS IN PLEDGES PAYABLE OVER THREE YEARS?
- 

	<u>NO.</u>	<u>PERCENT</u>
\$10,000,000 OR MORE	03	02.5%
\$9,000,000 - \$9,999,999	01	01%
\$8,000,000 - \$9,999,999	04	03.5%
\$7,000,000 - \$7,999,999	03	02.5%
\$6,000,000 - \$6,999,999	04	03.5%
\$5,000,000 - \$5,999,999	14	12%
\$4,000,000 - \$4,999,999	08	07%
\$3,000,000 - \$3,999,999	12	11%
\$2,000,000 - \$2,999,999	14	12%
\$1,000,000 - \$1,999,999	24	21%
LESS THAN \$1,000,000	27	24%

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8. IF A CAMPAIGN IS CONDUCTED, DO YOU THINK YOU MIGHT CONSIDER OR ACCEPT A CAMPAIGN LEADERSHIP POSITION IF ASKED?

---

	<u>NO.</u>	<u>PERCENT</u>
YES	01	01%
MAYBE	12	08%
NO	137	91%

---

9 IF NOT A LEADERSHIP POSITION, WOULD YOU WORK ON THE CAMPAIGN IN SOME OTHER CAPACITY?

---

	<u>NO.</u>	<u>PERCENT</u>
YES	13	09%
MAYBE	72	48%
NO	64	43%

---

10. IF A CAMPAIGN IS CONDUCTED, DO YOU THINK YOU WOULD MAKE A GIFT?

---

	<u>NO.</u>	<u>PERCENT</u>
YES	90	62%
MAYBE	47	33%
NO	07	05%

---

11. IF YOU WERE TO MAKE A GIFT, WHAT RANGE GIFT DO YOU THINK YOU MIGHT CONSIDER OVER A THREE YEAR PERIOD?

---

Of the 137 individuals or couples who said they would make or would consider making gifts, 95 mentioned specific amounts or a gift range they might consider. The highest gift mentioned was in the \$10,000 to \$15,000 range, and three individuals or couples mentioned they might consider a gift of \$5,000. Specified gifts ranged from a low total of \$108,770 to a high total of \$173,820.

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15. ARE YOU AWARE OF ANY OTHER CAMPAIGNS THAT ARE IN PROGRESS OR PLANNED THAT MIGHT CONFLICT WITH A CAMPAIGN FOR OUR LADY OF LORETTO CATHOLIC CHURCH?

---

	<u>NO.</u>	<u>PERCENT</u>
NO	124	86%
YES	20	14%

Mentioned more than once were the Archdiocesan Annual Appeal, youth ministry (although this is not outside the parish), Marin Catholic High School's \$15 million campaign (\$8 million already raised), which will allow the school to replace old structures in a 14-month construction project set for 2009, and other schools.

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16. DO YOU HAVE ANY OTHER COMMENTS OR SUGGESTIONS THAT YOU THINK MIGHT BE IMPORTANT OR HELPFUL TO THIS STUDY OR IN PLANNING A CAMPAIGN?

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(Comments included in Section C)