

**STEIER**<sup>®</sup>  
GROUP

*inspiring support*<sup>™</sup>

**PLANNING STUDY REPORT**

Prepared for St. Richard's Catholic Church  
Richfield, Minnesota

December 16, 2015



# Findings and Recommendations



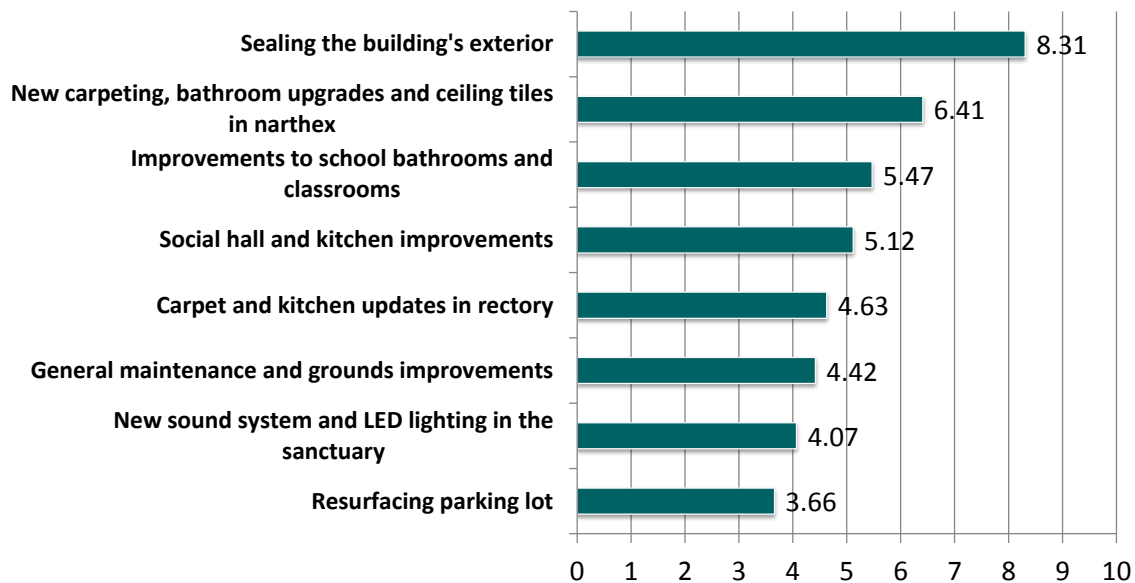
## Planning Study Findings

The findings and recommendations presented by the Steier Group are based on information from the following sources:

- 69 personal interviews with St. Richard’s Catholic Church’s leaders and potential top donors.
- 140 mail and online survey responses and 85 in-pew responses collected from St. Richard’s current parishioners.
- A review of St. Richard’s Catholic Church’s previous capital campaign as well as other ongoing development efforts.
- The Steier Group’s professional experience conducting planning studies and capital campaigns for Catholic parishes across the country.

Based on the information gathered from the sources above, the Steier Group is pleased to present the following observations and recommendations to St. Richard’s Catholic Church as it considers moving forward with a capital campaign.

**The potential campaign goals were prioritized as follows:**



**The following are the most critical statistical findings from the planning study:**

- 60 percent of respondents are at least familiar with the proposed projects.
- 69 percent of respondents are personally in favor of a capital campaign.
  - 70 percent of personal interview participants are in favor.
  - 69 percent of mail/online and in-pew respondents are in favor.
- 69 percent of respondents indicated that they will make a personal gift to the campaign.
  - 84 percent of personal interview participants will make a gift.
  - 64 percent of mail/online and in-pew respondents will make a gift.
- 29 respondents indicated that they would serve in a leadership position and assist with the solicitation of gifts for the campaign.
- 29 respondents indicated that they have already left a gift to St. Richard's in their estate.
  - 39 respondents indicated that they would be interested in learning more about how they could make a planned gift to St. Richard's.

**The following is a summary of the observations that were shared most frequently during the planning study:**

- Respondents place a high priority on St. Richard's being an opening and welcoming parish. Over half of those interviewed described the parish as "welcoming" or "feeling like my home."
- Parishioners are strongly committed to their church. Many respondents have noted that volunteering in parish ministries has positively affected their lives and helped them develop strong friendships with other parishioners.
- Respondents have indicated that, if the parish commits to a capital campaign, they would like to see Fr. Mark take an active public role. Many believe that his strong involvement could lead to success. At the same time, many parishioners like the strong partnership that exists between Fr. Mark and the parish leadership, and would like to see that partnership extend to a campaign.
- While a majority of respondents indicated they will support a campaign, one common caveat is that parishioners would like to see a clearer vision for the proposed projects or a parish master plan spanning the next three to five years. Some of those interviewed indicated they would not give to a campaign until more details were shared about how the social hall/gym would be renovated, for instance.
- Many respondents have noted that they are on fixed incomes and that their pledge would be less than that of the previous campaign. These respondents have also noted that while it is time for the next generation of parishioners to take the lead, there are not many young families at St. Richard of financial means.
- Both surveys and interviews have revealed that there is an undercurrent of unease about the future of Blessed Trinity School, and how a potential parish clustering or merger could affect some of the proposed projects.



## Required Elements for a Successful Campaign

The Steier Group has identified specific elements that will be required for St. Richard's to conduct a successful capital campaign and raise the \$1,100,000 - \$1,300,000 million projected by the Steier Group.

### Adhere to the Proven Methods of Successful Fundraising

- Conduct solicitations through personal, face-to-face visits
- Ask donors to make multi-year commitments
- Make requests that are proportional to an individual's capacity
- Approach every potential supporter
- Approach your strongest supporters first

### Positive, Enthusiastic Leadership

Beyond the method of fundraising, it is the Steier Group's professional experience that no single element is more determinative of the ultimate success of a campaign than committed, enthusiastic leadership. This enthusiasm must start at the top and work its way down through staff, volunteers and donors. The Steier Group can communicate this enthusiasm and amplify its effects, but it cannot generate it on its own. Simply put, if the parish leaders are excited about a project, volunteers and donors will be excited as well and that enthusiasm will translate into dollars raised for the parish.

### Unwavering Commitment to the Campaign Timeline

A capital campaign is a tremendous undertaking that will require a level of commitment beyond the day-to-day tasks that make up a parish staff's "regular jobs." A campaign requires aggressive action by parish leadership and intricate coordination with parish staff, campaign volunteers, graphic designers, printers and grant writers. The campaign must be seen as a top priority by Fr. Mark and all parties must commit to follow the detailed, phase-by-phase sequence of the campaign timeline.

# Survey Questions and Responses



## Question 1: What do you like best about St. Richard's?

### RESPONSES

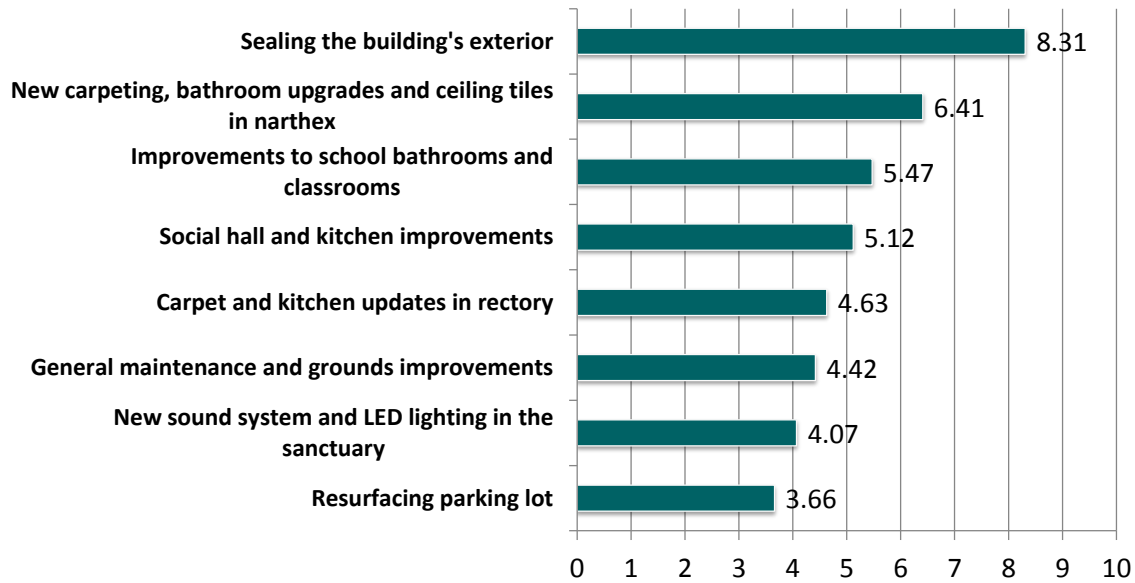
- It is a welcoming place. (41)
- St. Richard's feels like home. (31)
- The parishioners are invested. (13)
- I like the liturgy. (13)
- Fr. Mark is an excellent pastor. (11)
- The staff is competent at what they do. (9)
- The parish is close by. (8)
- St. Richard's has a strong group of volunteers. (8)
- I like Fr. Mark's sermons. (6)
- The staff works for the people. (5)
- St. Richard's is the right size for me. (4)
- The parish fits our worldview. (4)
- The ministries speak to my needs. (4)
- We believe in Blessed Trinity School. (3)
- 

*Note: This question was included in the personal interview only.*



## Question 2: How would you rate the following priorities?

### Combined Total Responses



### Personal Interview Responses

Project	Score
Sealing the building's exterior to include brick repairs, skylight replacement and exterior door repairs	9.27
New carpeting, bathroom upgrades and new ceiling tiles in the narthex	8.04
Social hall and kitchen improvements	5.58
Upgrading the sanctuary with a new sound system and LED lighting	5.07
General maintenance and grounds improvements	5.07
Carpeting and kitchen updates in the rectory	4.63
Resurfacing the parking lot	4.35
Improvements to the school bathrooms and classrooms	4.06

### Mail, Online and In-Pew Responses

Project	Score
Sealing the building's exterior to include brick repairs, skylight replacement and exterior door repairs	7.99
Improvements to the school bathrooms and classrooms	5.95
New carpeting, bathroom upgrades and new ceiling tiles in the narthex	5.88
Social hall and kitchen improvements	4.98
Carpeting and kitchen updates in the rectory	4.63
General maintenance and grounds improvements	4.20
Upgrading the sanctuary with a new sound system and LED lighting	3.74
Resurfacing the parking lot	3.43

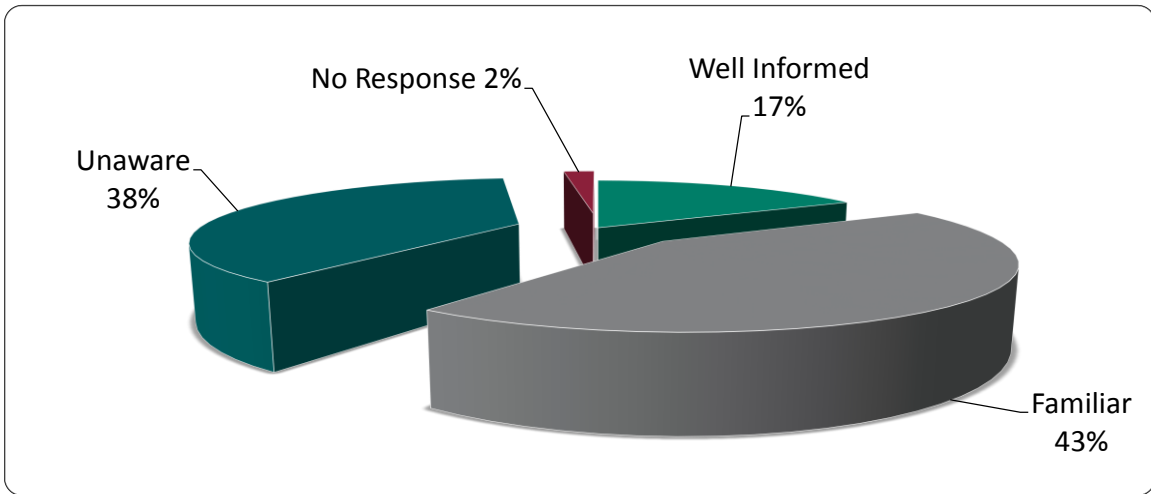
## Question 2: How would you rate the following priorities? (Continued)

*Note 1: Scores were calculated by assigning a value of 10 points for a high priority, 5 points for a moderate priority and 0 points for a low priority. The cumulative value for each project was then divided by the number of responses for that project.*

*Note 2: If a husband and wife were interviewed together and did not agree on the priorities, each spouse's response was recorded.*

### Question 3: How informed are you about the proposed projects?

#### Combined Total Responses



#### Personal Interview Responses

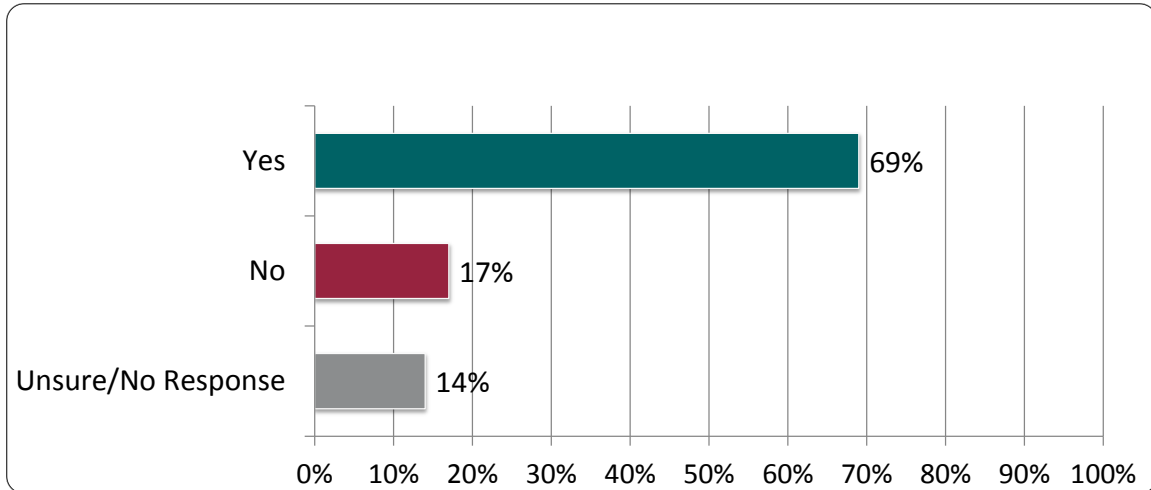
	Responses	Percentage of Total
Well Informed	29	42%
Familiar	32	46%
Unaware	8	12%
No Response	0	0%

#### Mail, Online and In-Pew Responses

	Responses	Percentage of Total
Well Informed	22	10%
Familiar	93	41%
Unaware	105	47%
No Response	5	2%

## Question 4: Are you personally in favor of St. Richard’s embarking on a capital campaign?

### Combined Total Responses



### Personal Interview Responses

	Responses	Percentage of Total
Yes	48	70%
No	8	11%
Unsure	13	19%
No Response	0	0%

### Mail, Online and In-Pew Responses

	Responses	Percentage of Total
Yes	155	69%
No	43	19%
Unsure	23	10%
No Response	4	2%

**Question 5: Are there any other projects that you would like St. Richard's to consider because you would be personally interested in funding them?**

**RESPONSES**

- We need to raise the height of the drinking fountains.
- I would like to see song lyrics projected on the wall of the church.

*Note: This question was included in the mail/online survey only.*

**Question 6: In your opinion, who are the 5 to 6 individuals or couples who would make the best leaders for a capital campaign at St. Richard's?**

**RESPONSES**

*(To ensure the confidentiality of those who responded to this question, 52 names have been provided to the leadership at St. Richard's.)*

*Note: This question was not included in the in-pew survey.*

**Question 7: If asked by Fr. Mark to serve as a member of the campaign team and assist with requests for gifts, would you accept?**

**Personal Interview Responses**

	Responses	Percentage of Total
Yes	18	26%
No	41	59%
Unsure	10	15%
No Response	0	0%

**Mail, Online and In-Pew Responses**

	Responses	Percentage of Total
Yes	11	5%
No	200	89%
Unsure	10	4%
No Response	4	2%

**Combined Total Responses**

	Responses	Percentage of Total
Yes	29	10%
No	241	82%
Unsure	20	7%
No Response	4	1%

**NAMES OF THOSE WHO RESPONDED FAVORABLY**

*(To ensure the confidentiality of those who responded to this question, 29 names have been provided to the leadership at St. Richard's.)*

## If not, which of these volunteer opportunities would you consider?

### Personal Interview Responses

	Responses
Phone-a-thon volunteer	5
Events committee member	19
Administrative support	18

### Mail, Online and In-Pew Responses

	Responses
Phone-a-thon volunteer	26
Events committee member	42
Administrative support	89

### Combined Total Responses

	Responses
Phone-a-thon volunteer	31
Events committee member	61
Administrative support	107



## Question 8: What should the role of Fr. Mark be in a capital campaign?

### RESPONSES

- I want him to be a visible participant. (28)
- Fr. Mark should be a public leader. (27)
- Fr. Mark should inspire financial support. (23)
- He should ask our key donors. (19)
- I want to see Fr. Mark shape the vision of the project. (9)
- Fr. Mark needs to talk about this frequently from the pulpit. (5)

*Note: This question was included in the personal interview only.*

## Question 9: If applicable, would your company support a capital campaign for St. Richard's with an outright gift or through a matching gift program?

### Personal Interview Responses

	Responses	Percentage of Total
Yes	0	0%
No	44	64%
Not Applicable	25	36%
Unsure	0	0%
No Response	0	0%

*Note: This question was included in the personal interview only.*

## Question 10: Who are the 5 to 6 families that you think would be most capable of making a lead gift to this campaign?

### RESPONSES

*(To ensure the confidentiality of those who responded to this question, 39 names have been provided to the leadership at St. Richard's.)*

*Note: This question was included in the personal interview only.*

## Question 11: Have you remembered St. Richard's in your estate plans?

### Personal Interview Responses

	Responses	Percentage of Total
Yes	14	20%
No	55	80%
Unsure	0	0%
No Response	0	0%

### Mail and Online Responses

	Responses	Percentage of Total
Yes	15	11%
No	117	84%
Unsure	6	4%
No Response	2	1%

### Combined Total Responses

	Responses	Percentage of Total
Yes	29	14%
No	172	82%
Unsure	6	3%
No Response	2	1%

### NAMES OF THOSE WHO RESPONDED FAVORABLY

*(To ensure the confidentiality of those who responded to this question, 29 names have been provided to the leadership at St. Richard's.)*

*Note: This question was not included in the in-pew survey.*

## Question 12: Would you like to receive more information about how to make a planned gift to St. Richard's?

### Personal Interview Responses

	Responses	Percentage of Total
Yes	30	43%
No	39	57%
Unsure	0	0%
No Response	0	0%

### Mail and Online Responses

	Responses	Percentage of Total
Yes	9	7%
No	123	88%
Unsure	6	4%
No Response	2	1%

### Combined Total Responses

	Responses	Percentage of Total
Yes	39	19%
No	162	77%
Unsure	6	3%
No Response	2	1%

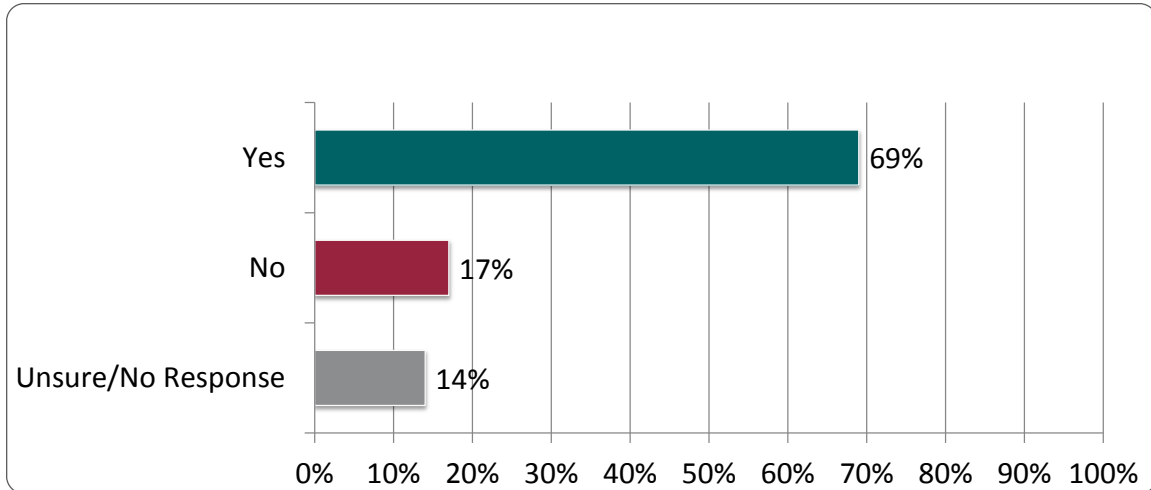
### NAMES OF THOSE WHO RESPONDED FAVORABLY

*(To ensure the confidentiality of those who responded to this question, 39 names have been provided to the leadership at St. Richard's.)*

*Note: This question was not included in the in-pew survey.*

## Question 13: If a campaign is conducted by St. Richard's, will you make a pledge?

### Combined Total Responses



### Personal Interview Responses

	Responses	Percentage of Total
Yes	58	84%
No	5	7%
Unsure	6	9%
No Response	0	0%

### Mail, Online and In-Pew Responses

	Responses	Percentage of Total
Yes	144	64%
No	46	20%
Unsure	34	15%
No Response	1	1%

### RESPONSES

- My offertory is the limit of what I can give. (5)

# Appendix



## Foundation Prospects

The following foundations will accept applications:

- Baillon Family Foundation
- Lilly Endowment\*
- Manitou Fund
- McGough Foundation
- The Casey Albert T. O'Neil Foundation
- Publix Supermarket Charities\*
- Summer Fund
- Kopp Family Charitable Trust
- The Richard M. Schulze Family Foundation
- The Raskob Foundation for Catholic Activities
- The GHR Foundation

The following foundations preselect and do not accept applications:

- Birmingham-Dorsey Charitable Trust
- The Cade Foundation
- The Catholic Community Foundation of Minnesota
- Gilligan Foundation
- The Morning Foundation
- Kinney Family Foundation
- Augustus H. Kennedy Memorial Fund Trust
- Maas Foundation
- Moore Family Foundation
- Opus Foundation\*
- The Sayer Charitable Foundation
- Roger A. Vasko Family Foundation
- Whaley Foundation

*\*Prior donor*



## Demographic Breakdown Chart

### Personal Interview Participants

Years of Membership	#	% In Favor	# Will Volunteer	% Will Give
0-5 Years	8	100%	4	87%
6-10 Years	5	100%	2	100%
11-20 Years	15	93%	6	93%
21-30 Years	7	57%	2	100%
31+ Years	30	53%	4	73%
Not a Member	4	25%	0	75%

### Mail and Online Participants

Years of Membership	#	% In Favor	# Will Volunteer	% Will Give
0-5 Years	27	70%	2	74%
6-10 Years	14	86%	1	64%
11-20 Years	17	65%	0	76%
21-30 Years	21	76%	2	71%
31+ Years	56	59%	1	66%
Not a Member	4	50%	0	25%
No Response	1	0%	0	0%

### Personal Interview Participants

Children in School	#	% In Favor	# Will Volunteer	% Will Give
Current, Future or Former Parent or Grandparent	21	71%	6	76%
Alumni	5	80%	2	100%
Other/None	43	67%	10	86%

### Mail and Online Participants

Children in School	#	% In Favor	# Will Volunteer	% Will Give
Current, Future or Former Parent or Grandparent	39	59%	2	61%
Other/None	98	70%	4	70%
No Response	3	33%	0	67%

Note: This question was not included in the in-pew survey.