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## Feasibility Study Overview

Holy Family Catholic Church retained the services of the Steier Group to conduct a feasibility study for a potential capital campaign. The feasibility study is a development tool used to determine how much money an organization can raise for a specific purpose. It is the starting point for an organization looking to answer the following questions:

- What do our donors think of the proposed projects?
- Who will serve as campaign leaders? Who will serve as volunteers?
- Who will be the main donors to the capital campaign?
- How should we structure a capital campaign?
- How much money can we raise?

The feasibility study involves a review of Holy Family's current needs as identified by parish leadership. The process of conducting personal, face-to-face interviews with Holy Family's top donors and gathering feedback from other key individuals allows the Steier Group to gain a clear understanding as to whether or not the proposed projects have the financial support necessary to be accomplished through a capital campaign. Should the total cost of the proposed projects prove too large to be completed in a single fundraising campaign, the feasibility study can provide guidance that will help leaders to prioritize the campaign goals.

The Steier Group gauges the fundraising potential for a capital campaign by analyzing the personal interview results, the mail and online survey responses, the ability of the parish's supporters to contribute financially and the willingness of those supporters to contribute toward this particular effort. The data gathered during this process, combined with our firm's experience in providing development counsel to Catholic parishes, allows the Steier Group to provide Holy Family with both general and specific recommendations regarding a potential capital campaign. Those recommendations include what the Steier Group feels to be a realistic campaign goal as well as a detailed plan to achieve that goal.

The Steier Group feasibility study team:

- Michael Henkenius, Senior Campaign Manager
- Sean McMahon, Senior Vice President of Client Services
- Jim Steier, Chief Executive Officer
- Susan Rosenlof, Foundation Researcher
- Melinda Berry, Graphic Designer
- Natalie Ruch, Executive Services Administrator

# Findings and Recommendations



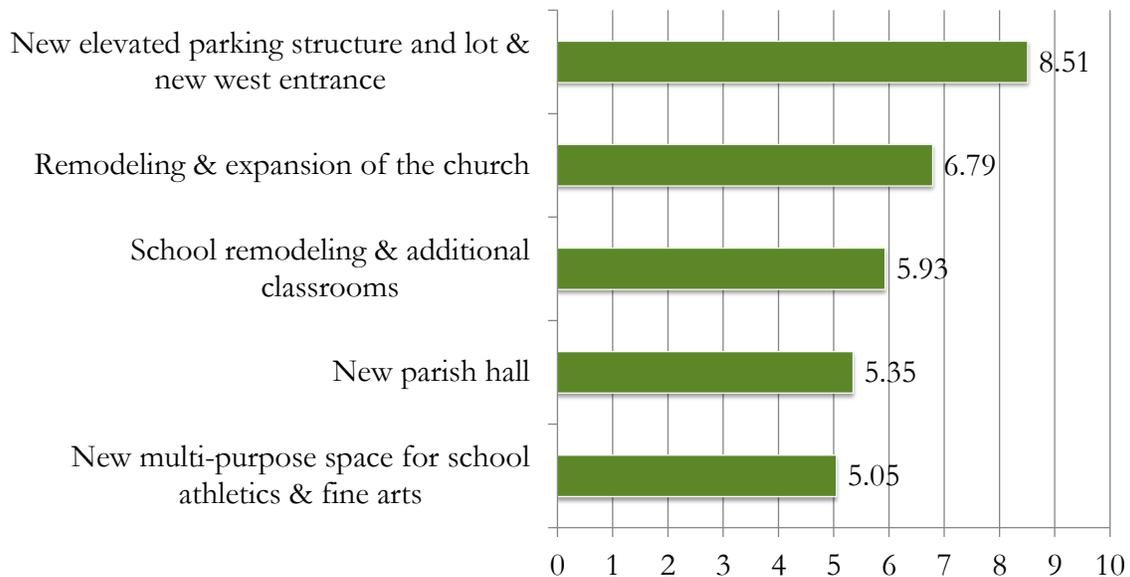
## Feasibility Study Findings

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

- 90 personal interviews with Holy Family’s leaders and potential top donors.
- 241 mail and online survey responses and 94 in-pew responses collected from Holy Family’s current parishioners.
- A review of Holy Family’s previous capital campaign as well as other ongoing development efforts.
- The Steier Group’s professional experience conducting feasibility 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 Holy Family 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 feasibility study:**

- 37% of respondents are at least familiar with the proposed projects.
- 87% of respondents are personally in favor of a capital campaign.
  - 94% of personal interview participants are in favor.
  - 86% of mail/online and in-pew respondents are in favor.
- 84% of respondents indicated that they will make a personal gift to the campaign.
  - 90% of personal interview participants will make a gift.
  - 82% of mail/online and in-pew respondents will make a gift.
- 98 respondents indicated that they would serve in a leadership position and assist with the solicitation of gifts for the campaign.
- 19 respondents indicated that they have already left a gift to Holy Family in their estate.
  - 42 respondents indicated that they would be interested in learning more about how they could make a planned gift to Holy Family.

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

- Holy Family is seen as a welcoming, friendly parish that fosters a great sense of community. Many feel the parish is like a family to them.
- Parishioners feel engaged. There are lots of opportunities to get involved in organizations and ministries.
- Father Jeff is greatly respected and appreciated by parishioners. He is seen as a significant reason for the parish's growth.
- There is solid consensus that the parish should address the parking problem. However, parishioners want a detailed explanation why the garage across the street is no longer available. Many also asked if adding another Mass could help with the parking problem.
- The majority of parishioners are unfamiliar with the master plan. The study's fact sheet is the first they've seen or heard of the plan details. Many believe it was thorough and well done.
- Staff and parishioners who are active and involved in parish activities and organizations are aware of the shortage of space in the current facility. Those not involved don't realize or understand the need.

The Steier Group identified potential donors at the following gift levels:

| Self-Reported Gift Level | Total Number of Potential Donors |
|--------------------------|----------------------------------|
| \$0                      | 28                               |
| \$1 - \$99               | 3                                |
| \$100 - \$499            | 14                               |
| \$500 - \$999            | 14                               |
| \$1,000 - \$2,499        | 127                              |
| \$2,500 - \$4,999        | 89                               |
| \$5,000 - \$9,999        | 23                               |
| \$10,000 - \$14,999      | 6                                |
| \$15,000 - \$19,999      | 5                                |
| \$20,000 - \$24,999      | 4                                |
| \$25,000 - \$29,999      | 2                                |
| \$30,000 - \$49,999      | 8                                |
| \$50,000 - \$74,999      | 5                                |
| \$75,000 - \$99,999      | 1                                |
| \$100,000 - \$150,000    | 3                                |
| No Response/Unsure       | 93                               |
| Total Responses          | 425                              |
| Total Gift Range         | \$1,766,785 - \$2,018,915        |



## **Fundraising Potential and Key Recommendations**

### **Fundraising Potential**

Based upon the positive results of the feasibility study, the Steier Group recommends that Holy Family immediately moves forward into the preparation phase of a three-year capital campaign beginning on July 7, 2014.

The Steier Group projects that Holy Family will raise \$4.5- \$5.5 million in a capital campaign by using the Steier Group's recommended approach. The Steier Group's recommended approach includes the Key Recommendations below as well and on the following pages.

### **Key Recommendations**

The feasibility study for Holy Family provided the Steier Group with insight into a number of key areas that will impact the success of a capital campaign. The Steier Group offers the following recommendations based on the information gathered during the study. These recommendations aim to quantify the areas that deserve special attention in the coming weeks and months should the parish move forward with a major fundraising effort.

#### Finalize Campaign Goals

- Holy Family leadership should use the preparation phase to finalize the campaign goals based on the parish's long range planning, responses in the feasibility study and the projected funding potential.
- Holy Family leadership should continue working with its architect to finalize the plan for the proposed campus master plan projects.
- Secure approval from the Diocese of Fort Worth to move forward with a capital campaign.

#### Recruit a Strong Leadership Team

- Holy Family leadership and the Steier Group should begin identifying and recruiting a strong, diverse leadership team to work on the capital campaign. Solidify commitments from key individuals identified through the feasibility study.
- While a strong group of lay leaders is essential, Fr. Jeff Poirot must take an active role in securing volunteers and leading campaign initiatives.
- Holy Family leadership and the Steier Group should ensure the campaign team includes representatives from all influential parish organizations.

### Implement a Comprehensive Communications Plan

- During the preparation phase of the campaign, Holy Family leadership should share the feasibility study results and campaign plan through a letter to the entire parish community. Emphasize the positive results of the study and the plan to finalize the design of the parish campaign based on the feasibility study responses and the parish's projected fundraising capacity.
- If Holy Family leaders decide to implement the master plan sequentially, communicate the reasoning to the entire parish community. Stress the logical construction order and cost savings that occur by following the master plan in phases.
- During the preparation phase of the campaign, consider the following communication strategies to educate the parish regarding facility needs:
  - Campus tours. Hold tours after Masses one weekend and walk parishioners through the existing parish hall and entrance areas. Highlight the deficiencies of the current building and how the new hall will help address those problems.
  - Ministry presentations: Approach the various ministry groups (i.e. Knights of Columbus) and provide a sneak preview of the proposed campaign goals. Explain why the goals were chosen and detail how those projects fit into the overall master plan.
  - Town Hall: Organize town hall meetings after Masses one weekend. Explain how parish leaders arrived at the campaign goals and detail how those projects fit into the overall master plan.
  - FAQ Series: Leading up to the public campaign kickoff, create a series of Frequently Asked Questions documents. Categorize them by project (i.e. parking deck, parish halls, future master plan) and provide transparent answers to all of the issues brought up during the feasibility study.
- Holy Family should work with the Steier Group to design a comprehensive communications plan that will educate parishioners on the needs facing the parish. The plan should include but is not limited to:
  - Bulletin announcements
  - Pulpit announcements
  - Brochures
  - Case statements
  - Campaign thermometers
  - E-mail
  - E-newsletters
  - Parish website
- Create comprehensive growth projections for Holy Family. These projections will allow leadership to share the long range vision for the parish and demonstrate how this capital campaign will allow the parish to meet future needs. This will be especially useful when laying out the case for the parking structure. Detail the ratio of parishioners to spots and how that will continue to increase when the parish population grows.

- When laying out the case for support, be sure to emphasize safety concerns and highlight how the new parking deck and entrance will help alleviate a hazardous situation for pedestrians while providing a secure drop-off area for parishioners.
- Throughout the preparation and solicitation phases of the capital campaign, plan and host targeted donor cultivation events to share the broad vision for the parish. Take care to address the concerns that were shared during the feasibility study and detail the thought process. Consider having Fr. Jeff host a series of small dinners to facilitate this process with major supporters.

#### Finalize Solicitation Strategy

- Based upon the capacity of some parish prospects, implement a lead gift appeal strategy that involves securing the largest gifts early so that we may challenge other parishioners to give at a higher level.
- Create naming opportunities designed to attract interest from major gifts prospects. Naming rights may include buildings, rooms, etc.
- Secure enough campaign volunteers so that the parish may approach the top 750 potential donors through face-to-face visits. Design and implement an alternative solicitation strategy for non-givers and low-level givers.
- Promote every opportunity for in-kind gifts. These can include construction, painting, plumbing, concrete, etc. Work with contractors to arrive at a dollar value for all in-kind work and promote those gifts to the entire parish.



## Proposed Campaign Timeline and Structure

The Steier Group recommends that Holy Family implement a 6-month capital campaign that is structured as follows:

### Preparation Phase (July - August)

This section will focus on finalizing the campaign goals, sharing the positive results of the feasibility study, identifying and recruiting campaign leadership, designing a comprehensive communications plan, preparing all campaign operational and promotional materials, conducting donor evaluation and developing personalized cultivation and solicitation strategies for potential lead gift donors.

### Leadership Gift Phase (August - September)

Also known as the “silent phase,” this section will involve the solicitation of the entire campaign volunteer team as well as a select few lead gift prospects. Fr. Jeff, campaign leadership and the Steier Group will personally solicit these prospects.

### Public Phase (September - November)

Once gifts have been secured from campaign leaders, Holy Family will move into the “public phase” of the campaign. The campaign leadership team and the Steier Group will personally solicit the remainder of the parish. The Steier Group will keep the parish up-to-date on the campaign progress throughout the entire effort.

### Grant Writing (throughout the campaign)

Foundations will be researched by the Steier Group and prioritized with input from the parish leadership. The Steier Group will manage the process of contacting each foundation, securing application guidelines, submitting the formal grant application and responding to any follow-up requests. The Steier Group will work to uncover any personal connections between foundation board members and campaign leadership or volunteers that may increase Holy Family chances to secure funding for this campaign. This process will continue throughout the campaign. *See the Appendix for a list of foundations identified as possible funding sources for this capital campaign.*

### Follow-Up Phase (December)

As personal solicitations are completed, the Steier Group will coordinate with the campaign Follow-Up Committee to host campaign phone-a-thons to target those prospects that have not yet responded. Additionally, “Commitment Weekend” will be held offering parishioners an opportunity to make a capital campaign donation during Mass. At the conclusion of the entire effort, a final direct-mail appeal will target all those who have not yet responded, providing them with a final opportunity to participate in the campaign.



## Required Elements for a Successful Campaign

The Steier Group has identified specific elements that will be required for Holy Family to conduct a successful capital campaign and raise the \$4.5 - \$5.5 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. Jeff Poirot 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 Holy Family Catholic Church?

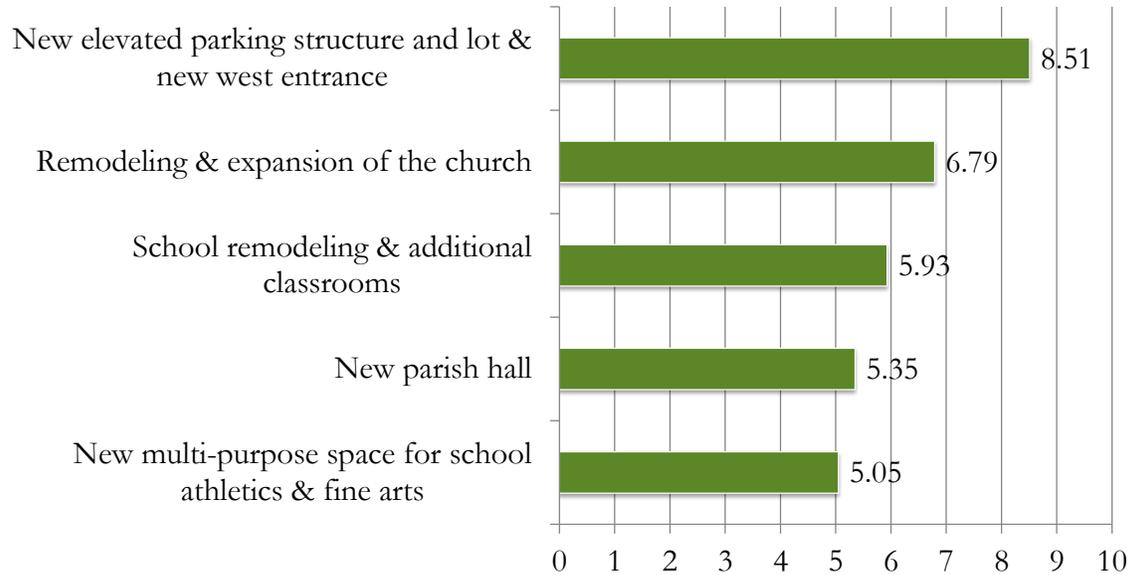
### RESPONSES

- Fr. Jeff is a wonderful pastor. (39)
- Holy Family is a welcoming parish. (22)
- The parish does a good job building community. It's like a family. (21)
- There are lots of opportunities to get involved in the parish. (19)
- The people here are friendly. (13)
- We like having a Catholic school. (9)
- We've been blessed by good pastors. (9)
- We have a great parish staff. (8)
- I love our church architecture. (6)
- The school has a strong academic reputation and prepares students well. (6)
- There is a good relationship between the parish and school. (5)
- I like the RCIA program. (4)
- We have good youth programs. (3)
- There are lots of growing families. (3)
- We have strong music ministry. (2)
- The parish has strong religious education programs. (2)
- The parish is very well run. (2)
- There are many parish outreach programs. (2)
- We like the smaller parish size. (2)
- We like being able to share our beliefs.
- I like that we have a divorced and separated ministry.
- It's a very diverse parish.
- Liturgy is done well at the parish.
- The school has the lowest tuition in town.
- St. Vincent de Paul is great.
- The parish has a bright future.
- The parishioners support the parish financially and meet our financial needs.
- We have a strong confirmation program.

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

## Question 2: In your opinion, how would you rate the following priorities?

### Combined Total Responses



### Personal Interview Responses

| Project  | Score |
|--|-------|
| A new elevated parking structure and lot and a new west entrance to the church | 8.62  |
| Remodeling and expansion of the church   | 7.74  |
| School remodeling and building additional classrooms                           | 6.51  |
| A new parish hall  | 6.46  |
| A new multi-purpose space for school athletics and fine arts                   | 5.73  |

### Mail, Online and In-Pew Responses

| Project  | Score |
|--|-------|
| A new elevated parking structure and lot and a new west entrance to the church | 8.48  |
| Remodeling and expansion of the church   | 6.52  |
| School remodeling and building additional classrooms                           | 5.76  |
| A new parish hall  | 5.05  |
| A new multi-purpose space for school athletics and fine arts                   | 4.86  |

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 2: In your opinion, how would you rate the following priorities? (Continued)

### RESPONSES

#### Phase 1

- Can we continue to try and use the garage across the street? (18)
- Is 92 spaces enough? (10)
- Some people don't go to church because of the parking problem. (9)
- Can we only build the surface lot? The deck would be too expensive. (7)
- Adding or changing Mass times will alleviate the parking problem. (5)
- There is a consensus among parishioners for the need for more parking. (4)
- The parking problem is dangerous. (4)
- Can they build another level on the two deck garage? (4)
- We can't hold parish events because of the lack of parking. (3)
- More parking will bring more people to the parish. (3)
- We need another driveway access in and out from the new surface lot. (2)
- Some people come an hour early to park for church.
- I always apologize to visitors for our lack of parking.
- Can we use the lower level of the new parking deck for activities?
- Has the parish tried to buy or lease the lot across the street?
- Can they build a level down below the existing parking on the west side?
- Can the parish buy the empty lot across the street at the corner of Pershing and Gilford?
- Can they put a deck in the back behind the church?
- A parking deck would not work. It would create too much congestion.

#### Phase 2

- The parish hall is too much money. Can it be built for less? (3)
- We need more space for parish events. (2)
- The parish hall is too far away from the church. It should be connected. (2)
- There is no room for religious education classes.
- This is the highest priority.
- This will help us provide more hospitality.
- The location for the hall will be difficult to build on and costly.
- How many people could have a sit down dinner in the new parish hall?
- A new social hall would help recruit more parishioners.
- Would this space be used enough to justify the expense?
- This would help increase attendance at parish events.
- The current parish hall is not inviting.

#### Phase 3

- Can we add another Mass to help with overcrowding? Not all Mass times are crowded. (14)
- Does this phase include balcony seating? (5)
- 150 seats is not enough. (3)
- More seating is a priority. (2)
- Use the open space in the southeast corner by the church to expand it out. (2)
- Restrooms are very important. (2)
- The church needs updating. (2)
- The carpet needs to be changed. (2)
- People are standing during our Masses.

## Question 2: In your opinion, how would you rate the following priorities? (Continued)

### Phase 3 (Continued)

- The church remodel and renovation is the most important phase.
- People won't see the need for this phase.
- There is a high cost for not a lot of gain in seating to the church.
- Expanding the narthex is a top priority.
- A bride's room is sorely needed.
- Update the church interior with the remodeling.
- Don't remodel the church. It's beautiful.

### Phase 4

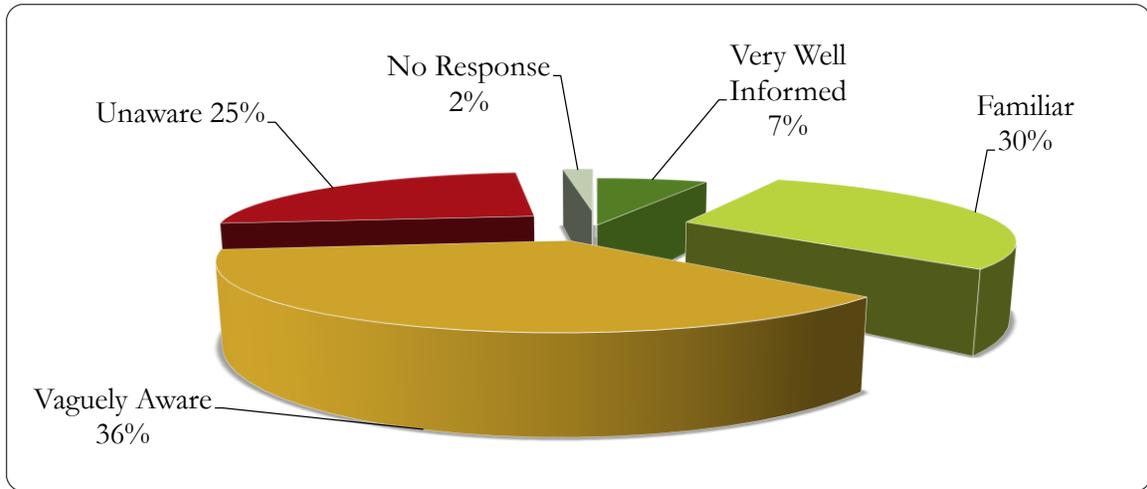
- This is the most important phase. (4)
- It would bring more families into the parish. (3)
- We lose school kids in Jr. High because we don't have a gym. (3)
- Can we share facilities with St. Peter School?
- Show that the parish can use the new gym.
- Partner with other nearby fine/performing arts schools.
- Put on hold until school completes strategic planning process.
- Make sure you can host volleyball and basketball games there.

### Phase 5

- Would bring more families into the parish. (5)
- This is the most important phase. (4)
- Is there a cafeteria? (3)
- The school is in dire need of upgrades and renovations. (3)
- Can we build a 2nd story on the school? (2)
- Is the library being remodeled? (2)
- The HVAC system in the school could go out anytime.
- Put on hold until the school completes its strategic planning process.
- It would bring more families into the parish.
- Have to plan for contingencies if the HVAC system dies before Phase 5 starts.

### Question 3: How familiar are you with the proposed plans?

#### Combined Total Responses



#### Personal Interview Responses

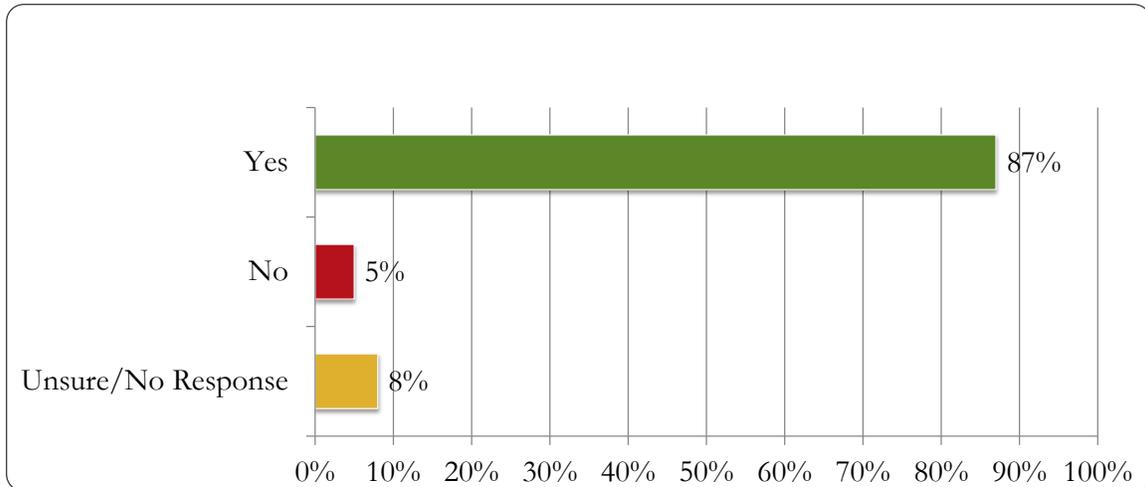
|                    | Responses | Percentage of Total |
|--------------------|-----------|---------------------|
| Very Well Informed | 11        | 12%                 |
| Familiar           | 17        | 19%                 |
| Vaguely Aware      | 20        | 22%                 |
| Unaware            | 42        | 47%                 |
| No Response        | 0         | 0%                  |

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

|                    | Responses | Percentage of Total |
|--------------------|-----------|---------------------|
| Very Well Informed | 17        | 5%                  |
| Familiar           | 112       | 33%                 |
| Vaguely Aware      | 134       | 40%                 |
| Unaware            | 62        | 19%                 |
| No Response        | 10        | 3%                  |

## Question 4: Are you personally in favor of Holy Family Catholic Church embarking on a capital campaign?

### Combined Total Responses



### Personal Interview Responses

|             | Responses | Percentage of Total |
|-------------|-----------|---------------------|
| Yes         | 85        | 94%                 |
| No          | 1         | 1%                  |
| Unsure      | 4         | 5%                  |
| No Response | 0         | 0%                  |

### Mail, Online and In-Pew Responses

|             | Responses | Percentage of Total |
|-------------|-----------|---------------------|
| Yes         | 286       | 86%                 |
| No          | 21        | 6%                  |
| Unsure      | 7         | 2%                  |
| No Response | 21        | 6%                  |

## **Question 5: Are there any other projects that you would like Holy Family Catholic Church to consider because you would be interested in supporting them financially?**

### **RESPONSES**

- We would like a cry room for the church. (14)
- Have the ability to view Mass via video feed to a TV in the chapel and other locations (new hall). (5)
- Install more handicapped seating in the church and more handicapped parking spots. (4)
- We need a new sound system for the church. (3)
- We need a security system for the school and church. (2)
- Build a drive up covered entrance and drop off area for the school. (2)
- We need new carpet. (2)
- Repair the roof of the church where needed. (2)
- Make administrative office upgrades.
- Have the young people raise money to furnish their new meeting space.
- The parish should just build a larger narthex and avoid the other projects.
- Include technology enhancements in all projects.
- Replace the glass at the front of the school with new security glass.
- Put in a community garden.
- Help with low income housing individuals in the community.
- Put in bleachers for the athletic fields.
- Have an adequate rectory for priests.
- Make sure the parish staff has up-to-date equipment.
- Provide special needs programs in the Catholic schools.
- Buy land around the church.
- Improve adult and youth formation programs.
- Do a new and improved landscaping project around the church.
- Provide tuition assistance for teachers, faculty and staff at the school.
- Update the choir loft.
- Invest in teachers' salaries instead of facilities.

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

**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 Holy Family Catholic Church?**

*Note: The names of 139 individuals/couples have been provided to Fr. Jeff Poirot. This question was not included in the in-pew survey.*

**Question 7: If asked by Holy Family Catholic Church to serve in a campaign leadership position and assist in the solicitation of gifts, would you accept?**

**Personal Interview Responses**

|             | Responses | Percentage of Total |
|-------------|-----------|---------------------|
| Yes         | 37        | 41%                 |
| No          | 39        | 43%                 |
| Unsure      | 9         | 10%                 |
| No Response | 5         | 6%                  |

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

|             | Responses | Percentage of Total |
|-------------|-----------|---------------------|
| Yes         | 61        | 18%                 |
| No          | 231       | 69%                 |
| Unsure      | 16        | 5%                  |
| No Response | 27        | 8%                  |

**Combined Total Responses**

|             | Responses | Percentage of Total |
|-------------|-----------|---------------------|
| Yes         | 98        | 23%                 |
| No          | 270       | 64%                 |
| Unsure      | 25        | 6%                  |
| No Response | 32        | 7%                  |

*Note: The names of the 98 individuals/couples have been provided to Fr. Jeff Poirot.*

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

### RESPONSES

- He needs to be in front leading the campaign and back it one hundred percent. (26)
- Fr. Jeff needs to be the chief communicator. He needs to sell the campaign and present the vision for the parish. (19)
- He has great personality and energy to lead the campaign. (8)
- Father Jeff needs to educate and show parishioners how this campaign benefits the entire parish. (5)
- Father Jeff needs to be visible during the campaign. (4)
- He needs to be the lead fundraiser and make asks from the top donors. (3)
- Recruit good campaign leaders. (3)
- Provide direction, oversight and guide the process. (2)
- He needs to provide a consistent message and vision throughout the campaign.
- Don't talk about money too much from the pulpit.
- He will have to balance the school and parish's interests.
- He should not be the face of the campaign.
- He needs to provide a consistent message and vision throughout the campaign.
- He needs to talk in detail about the campaign at Mass.

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

**Question 9: If applicable, would your company support a capital campaign for Holy Family Catholic Church with an outright gift or through a matching gift program?**

**Personal Interview Responses**

|                | Responses | Percentage of Total |
|----------------|-----------|---------------------|
| Yes            | 5         | 6%                  |
| No             | 17        | 19%                 |
| Not Applicable | 34        | 38%                 |
| Unsure         | 3         | 3%                  |
| No Response    | 31        | 34%                 |

*Note: Names of the companies that responded positively have been provided to Fr. Jeff Poirot. 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?**

*Note: The names of the 42 individuals/ couples that responded positively to this have been provided to Fr. Jeff Poirot. This question was included in the personal interview only.*

## Question 11: Have you remembered Holy Family Catholic Church in your estate plans?

### Personal Interview Responses

|             | Responses | Percentage of Total |
|-------------|-----------|---------------------|
| Yes         | 4         | 5%                  |
| No          | 53        | 59%                 |
| Unsure      | 3         | 3%                  |
| No Response | 30        | 33%                 |

### Mail and Online Responses

|             | Responses | Percentage of Total |
|-------------|-----------|---------------------|
| Yes         | 15        | 6%                  |
| No          | 207       | 86%                 |
| Unsure      | 1         | 1%                  |
| No Response | 18        | 7%                  |

### Combined Total Responses

|             | Responses | Percentage of Total |
|-------------|-----------|---------------------|
| Yes         | 19        | 6%                  |
| No          | 260       | 79%                 |
| Unsure      | 4         | 1%                  |
| No Response | 48        | 14%                 |

*Note: The names of the 19 families that responded positively have been provided to Fr. Jeff Poirot. This question was not included in the in-pew survey.*

## Question 12: Would you like to receive information about the different methods to make an estate gift to Holy Family Catholic Church?

### Personal Interview Responses

|             | Responses | Percentage of Total |
|-------------|-----------|---------------------|
| Yes         | 13        | 15%                 |
| No          | 44        | 49%                 |
| Unsure      | 3         | 3%                  |
| No Response | 30        | 33%                 |

### Mail and Online Responses

|             | Responses | Percentage of Total |
|-------------|-----------|---------------------|
| Yes         | 29        | 12%                 |
| No          | 196       | 81%                 |
| Unsure      | 0         | 0%                  |
| No Response | 16        | 7%                  |

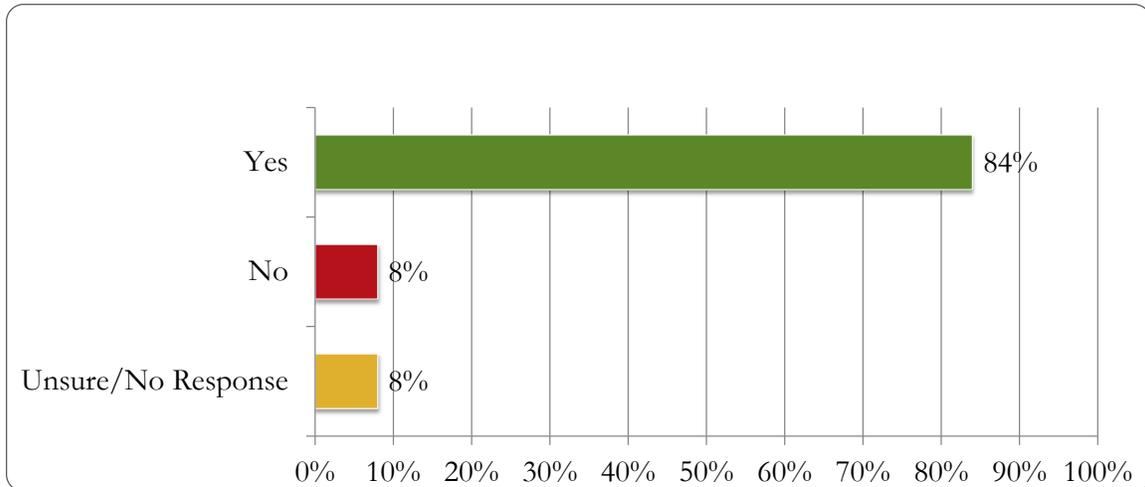
### Combined Total Responses

|             | Responses | Percentage of Total |
|-------------|-----------|---------------------|
| Yes         | 42        | 13%                 |
| No          | 240       | 72%                 |
| Unsure      | 3         | 1%                  |
| No Response | 46        | 14%                 |

*Note: The names of the 42 families that responded positively have been provided to Fr. Jeff Poirot. This question was not included in the in-pew survey.*

## Question 13: If a campaign is conducted by Holy Family Catholic Church, would you make a pledge?

### Combined Total Responses



### Personal Interview Responses

|             | Responses | Percentage of Total |
|-------------|-----------|---------------------|
| Yes         | 81        | 90%                 |
| No          | 1         | 1%                  |
| Unsure      | 5         | 6%                  |
| No Response | 3         | 3%                  |

### Mail, Online and In-Pew Responses

|             | Responses | Percentage of Total |
|-------------|-----------|---------------------|
| Yes         | 274       | 82%                 |
| No          | 34        | 10%                 |
| Unsure      | 13        | 4%                  |
| No Response | 14        | 4%                  |

**Question 14: Will you please estimate what range of pledge you might consider if Holy Family Catholic Church moves forward with a capital campaign?**

**RESPONSES**

| Self-Reported Gift Level | Personal Interview      | Mail/Online/In-Pew    | Total                     |
|--------------------------|-------------------------|-----------------------|---------------------------|
| \$0                      | 1                       | 27                    | 28                        |
| \$1 - \$99               | 0                       | 3                     | 3                         |
| \$100 - \$499            | 0                       | 14                    | 14                        |
| \$500 - \$999            | 0                       | 14                    | 14                        |
| \$1,000 - \$2,499        | 7                       | 120                   | 127                       |
| \$2,500 - \$4,999        | 13                      | 76                    | 89                        |
| \$5,000 - \$9,999        | 8                       | 15                    | 23                        |
| \$10,000 - \$14,999      | 5                       | 1                     | 6                         |
| \$15,000 - \$19,999      | 4                       | 1                     | 5                         |
| \$20,000 - \$24,999      | 4                       | 0                     | 4                         |
| \$25,000 - \$29,999      | 2                       | 0                     | 2                         |
| \$30,000 - \$49,999      | 5                       | 3                     | 8                         |
| \$50,000 - \$74,999      | 4                       | 1                     | 5                         |
| \$75,000 - \$99,999      | 1                       | 0                     | 1                         |
| \$100,000 - \$150,000    | 2                       | 1                     | 3                         |
| No Response/Unsure       | 34                      | 59                    | 93                        |
| Total Responses          | 90                      | 335                   | 425                       |
| Total Gift Range         | \$853,900 - \$1,086,400 | \$912,885 - \$932,515 | \$1,766,785 - \$2,018,915 |

## Question 15: Will you please estimate an initial gift payment you would make to support the campaign?

### RESPONSES

| Self-Reported Gift Level | Personal Interview | Mail/Online | Total     |
|--------------------------|--------------------|-------------|-----------|
| \$0                      | 1                  | 23          | 24        |
| \$1 - \$99               | 0                  | 10          | 10        |
| \$100 - \$499            | 1                  | 59          | 60        |
| \$500 - \$999            | 0                  | 33          | 33        |
| \$1,000 - \$2,499        | 1                  | 24          | 25        |
| \$2,500 - \$4,999        | 0                  | 1           | 1         |
| \$5,000 - \$9,999        | 2                  | 4           | 6         |
| \$10,000 - \$14,999      | 0                  | 1           | 1         |
| \$20,000 - \$24,999      | 0                  | 1           | 1         |
| \$25,000 - \$29,999      | 1                  | 0           | 1         |
| \$50,000 - \$74,999      | 0                  | 1           | 1         |
| No Response/Unsure       | 84                 | 84          | 168       |
| Total Responses          | 90                 | 241         | 331       |
| Total Gift Amount        | \$36,250           | \$156,750   | \$193,000 |

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

## **Question 16: Do you have any further comments or suggestions that would be helpful to parish leadership as they look at potentially embarking on a capital campaign for these projects? Do you have any concerns that might keep you from supporting a campaign at Holy Family Catholic Church?**

### **Campaign Communication and Strategy**

- The parish needs to effectively communicate and demonstrate the need for the campaign. (12)
- There are a lot of positives to this campaign. It's exciting. (8)
- This is the first I've heard of these plans. The parish should have communicated the master plan before the feasibility study and had more discussion. (7)
- The timing is right for a campaign. (7)
- Don't go into debt for any of the campaign projects. (5)
- You need to build a sense of ownership in the campaign among all parishioners. (4)
- \$16.2 million is too much to raise in one campaign. (4)
- The parish can raise the \$16.2 million. (4)
- We need a town hall meeting before campaign starts to communicate the projects. (2)
- The feasibility study fact sheet was well done and does a good job communicating. (2)
- Expand the pledge period to five years. Three years is too short. (2)
- The parish needs to share financial information with parishioners. Give an annual end of the year financial report.
- The campaign needs to show financial accountability and transparency.
- St. Patrick Cathedral is starting a campaign that might affect giving.
- You need to show more details of the projects once the campaign starts.
- Give tours of the parish to communicate the need.
- There are a lot of mid-level givers in the parish.
- Challenge every parish household to contribute.
- Push online giving.
- Make sure you don't conduct the campaign at the same time as the diocesan appeal.
- Get a campaign leader/liaison from every parish organization.
- Make sure you approach new parishioners after the initial pledge period.

### **Facilities**

- We're out of space for meetings, events and activities. (10)
- The parish needs to consider the increased maintenance and staffing costs of the new building projects. (10)
- We can't accommodate special events and occasions now. (4)
- We've put off capital improvement projects for too long. We need to maintain and upgrade our facilities. (4)
- The HVAC systems could die in both the church and school. (3)
- How much will and can the parish borrow to accomplish these projects? (3)
- We need gathering space. (2)
- Parishioners aren't aware of the critical need for space at the parish. (2)
- Hire a project manager to oversee all the building projects. (2)
- Has a structural engineer looked at our facilities and plan? (2)
- More space with all the remodeling and additions will bring more people into the parish. (2)
- Our young people need a gathering space.

## **Question 16: Do you have any further comments or suggestions that would be helpful to parish leadership as they look at potentially embarking on a capital campaign for these projects? Do you have any concerns that might keep you from supporting a campaign at Holy Family Catholic Church?**

### **Facilities (Continued)**

- Make sure the RCIA classroom is near the nursery for younger families.
- Need to show specifically where and why there is a space issue.
- Make sure new construction matches the current architecture.
- Are fire lanes in the plans?
- Be environmentally friendly with new construction.
- I didn't like the last parking expansion that took away the ball fields.

### **Master Plan**

- The master plan was done well and I like the order of the priorities. (14)
- What is the time frame to complete all these plans? (6)
- The parish did not conduct a true master plan. Not enough parish groups were involved. (3)
- Does all the expansion tie the parish's hands too much?
- Is there land the parish can buy to build new facilities?
- Does the parish want to grow?
- Why are there two kitchens in the master plan?
- I was excited to see improvements to the parish being planned. We haven't had any effort to improve things in a long time.
- Can we build a new church at a different location?
- The cost estimates for the phases seem reasonable.

### **Parish**

- What happens when Fr. Jeff leaves? (27)
- The parish has lost a lot of generous families over the years. (9)
- Has the parish done any demographic studies? (6)
- Does the parish have any savings? (4)
- The parish needs to publish the weekly giving in the bulletin, in relation to the weekly budget, and show the annual expenses versus revenues collected each week.
- The parish should send a detailed annual financial report to parishioners.
- The parish did a good job with the last parking lot project.
- With the extra 400 families, has revenue increased?
- When people sign up for time/talent during stewardship appeals there is no follow up and no one gets called.
- A school liaison needs to be established to ensure communication between the parish and school.
- There are concerns that parish personnel need changing.
- St. Peter and Holy Redeemer parishioners are coming here. That inflates our numbers.
- The parish is having growing pains.
- We have a growing parish.
- Will the parish growth be sustainable?

## **Question 16: Do you have any further comments or suggestions that would be helpful to parish leadership as they look at potentially embarking on a capital campaign for these projects? Do you have any concerns that might keep you from supporting a campaign at Holy Family Catholic Church? (Continued)**

### School

- Catholic education is vital. The school brings families into the parish and helps build the parish. (9)
- The school phases are a lot of money for a small amount of families. (8)
- Does the school want to grow? How big do we want the school to be? (7)
- To stay competitive you need to have good facilities. (5)
- We need to make school tuition more affordable. (4)
- There are some concerns with the school administration and personnel. (3)
- Academic standards at the school have dropped. (2)
- We need to work hard to get school families involved in the campaign. (2)
- The school plans don't provide for enough space for a growth in enrollment. (2)
- The diocese needs to start another Catholic high school which would help increase enrollment in our Catholic elementary schools. (2)
- Form a committee to make a strategic plan for the school. (2)
- We need to retain a greater percentage of junior high students. Middle school is when we lose students and where the school lacks the most. (2)
- Being a small school is a strength. Don't try and grow too big. We don't have the space. (2)
- Eliminate grades 5-8 at the school and combine with St. Peter. (2)
- We've seen tuition increases but no improvements to the school. Compared to other private schools we aren't getting as much value. (2)
- School enrollment is dropping.
- How many students are non-parishioners?
- Once the parish phases are completed it will build momentum for the school.
- Kindergarten classrooms are not great.
- The school needs to reevaluate its academic plan.
- There is a problem with turnover at the school. Bring in some business expertise.
- Wealthy families don't send their kids to Holy Family.
- The school was the main reason we joined the parish.
- The school needs to market itself.

# Appendix

## **Holy Family Catholic Church Foundation Prospects**

**The following foundations will accept applications:**

- Richard D. Bass Foundation
- The Boeckman Family Foundation
- The Hartnett Foundation, Inc.
- The Duda Family Foundation
- Kleinheinz Family Endowment for the Arts
- Joyce and Lawrence Lacerte Charitable Foundation
- Peach Mott Foundation Inc.
- The Staubach Family Foundation
- The Mike and Mary Terry Family Foundation
- Community Foundation of North Texas
- Rosemary Haggar Vaughan Family Foundation
- Crystelle Waggoner Charitable Trust

**The following foundations preselect and do not accept applications:**

- The Ackels Foundation
- Bish & Frannie Cismoski Foundation
- The Isabell and J.M. Haggar, Jr. Family Foundation
- The Kent and JoAnn Foster Family Foundation
- The Ben and Mary Frances Doscocil Private Foundation
- The Gonsoulin Charitable Trust
- Elder Family Foundation
- The Michael and Linda Mewhinney Foundation
- The Aileen and Jack Pratt Foundation
- Robert J. and Edith K. Schumacher Foundation
- The Siemer Foundation
- The Wooldridge Foundation

**Holy Family Catholic School  
Education Only  
Foundation Prospects**

**The following foundations will accept applications:**

- Edward & Wilhelmina Ackerman Foundation
- Anne T. & Robert M. Bass Foundation
- Katrine Menzing Deakins Charitable Trust
- Hoblitzelle Foundation
- The Hogle Foundation
- The Discovery Fund
- William A. and Elizabeth B. Moncrief Foundation
- The Eugene McDermott Foundation
- Sid W. Richardson Foundation
- William E. Scott Foundation
- Amon G. Carter Foundation

**The following foundations preselect and do not accept applications:**

- The Burnett Foundation
- Dr. Bob and Jean Smith Foundation

## Demographic Breakdown Chart Holy Family Catholic Church

### *Personal Interview Participants*

| Group       | #  | % In Favor | # Will Volunteer | % Will Give |
|-------------|----|------------|------------------|-------------|
| 0-5 Years   | 10 | 90%        | 5                | 90%         |
| 6-10 Years  | 8  | 100%       | 4                | 87%         |
| 11-20 Years | 21 | 95%        | 9                | 95%         |
| 21-30 Years | 17 | 94%        | 7                | 94%         |
| 30+ Years   | 28 | 93%        | 12               | 82%         |
| No Response | 6  | 100%       | 0                | 100%        |

### *Mail and Online Participants*

| Group       | #  | % In Favor | # Will Volunteer | % Will Give |
|-------------|----|------------|------------------|-------------|
| 0-5 Years   | 69 | 83%        | 14               | 83%         |
| 6-10 Years  | 32 | 81%        | 3                | 94%         |
| 11-20 Years | 55 | 87%        | 10               | 82%         |
| 21-30 Years | 27 | 89%        | 4                | 89%         |
| 30+ Years   | 53 | 75%        | 6                | 60%         |
| No Response | 5  | 80%        | 0                | 80%         |

### *Personal Interview Participants*

| Group   | #  | % In Favor | # Will Volunteer | % Will Give |
|---|----|------------|------------------|-------------|
| Current, Future or Former Parent or Grandparent | 34 | 97%        | 18               | 85%         |
| Other/None                                      | 51 | 92%        | 19               | 92%         |
| No Response                                     | 5  | 100%       | 0                | 100%        |

### *Mail and Online Participants*

| Group   | #   | % In Favor | # Will Volunteer | % Will Give |
|---|-----|------------|------------------|-------------|
| Current, Future or Former Parent or Grandparent | 57  | 85%        | 19               | 86%         |
| Other/None                                      | 150 | 82%        | 18               | 77%         |
| No Response                                     | 4   | 50%        | 0                | 25%         |

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