



August 28, 2017

We wish to extend our thanks to all for the cooperation, support and gracious hospitality extended to Jerry Campbell throughout the feasibility study process recently completed.

A special word of thanks goes out to Allison Hainlen for coordinating the personal interviews and the office staff and volunteers for the mailing of the questionnaires.

During the implementation process, we found friendly, concerned, and open communication regarding the proposed campaign and project plans. A total of 133 units participated in the survey; 13 interviews were conducted, 17 responded to the mail questionnaires, and 103 responded to the online survey. This represents a total response rate of 45% among the members of the church community that were contacted.

This study is our distillation of the information, opinions, and ideas gathered through the survey. It represents our combined evaluation and appraisal of major factors related to the proposed campaign.

Now important decisions must be made to continue the momentum essential to the success of a campaign. The Episcopal Church Foundation welcomes the opportunity to provide further assistance.

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I. Tentative Case Statement	

Executive Summary

After a period of discernment, and the thoughtful, prayerful and careful evaluation of needs, parishioners of St. Wilfrid of York Episcopal Church in Huntington Beach, were surveyed through a Feasibility Study conducted by the Episcopal Church Foundation (ECF) in July and August of 2017

The purpose of the study was to determine the willingness of the parish to support a proposed capital campaign to raise up to \$932,000 from members of the congregation for building renovations and improvements.

All members of the parish were invited to participate in the feasibility study and 133 folks (45%) responded to the survey via personal interviews, led by the ECF consultant, direct mail, and electronic emailed survey. Based on experience, this response rate is a good representation of involvement from the parish community, lending credibility to the study findings.

Responses indicate 92% of the respondents support a capital campaign. In addition, 66% of the respondents expressing a willingness to make a financial contribution with another 29% simply not sure at this time. Nineteen percent indicate a willingness to consider a volunteer role in a campaign.

By using the ranges of estimated gifts that respondents indicated, and applying a formula which takes into account as yet unidentified gifts, as well as other relevant factors noted in the responses, ECF recommends that St. Wilfrid's has a strong probability of raising \$822,000 in a capital campaign.

There are two major factors that contribute to the identification of a lower goal amount:

- 1) While 66% of the respondents expressed a willingness to make a financial contribution to the campaign, an unusually high number of people (34) indicated that they were "not sure at this time." (see p. 42). If 66% of those people eventually participated in the campaign that would mean at least 22 more gifts that are NOT included in the calculations for this study.
- 2) Eighty-seven percent of the respondents either felt that the goal was too high (18%) or they didn't know (69%). That level of uncertainty can suggest that the tested goal is too high.

There are a number of positive indicators for proceeding, as the Feasibility Study indicates: an awareness of the needs, willingness by many to give, identified leadership, and a willingness at an early date to volunteer.

The lower amount indicated in the Feasibility Study does not appear to be an indicator of lack of support, but a lack of knowledge on the part of some parishioners regarding the needs and some concern that there is not adequate financial capacity to support a larger goal.

If a realistic goal is used, there is great potential for a successful capital campaign. While the amount recommended is lower than the overall goal, there appears to be great support for this initiative. Based on the results of this study, St. Wilfrid's leadership will need to determine what projects are feasible in light of the amount of funding that can be raised in the parish. Utilizing the results of the project priorities section can provide some insight as to the level of support for each project.

All of the comments provided by respondents are included in the following report, and I encourage you to read them thoroughly in order to obtain a complete understanding of all the views expressed in the study. This may well prove helpful to the leadership and members of the congregation as decisions are made about the breadth and extent of the final campaign.

Peace,

Jerry Campbell

Section One:

Conclusions, Recommendations and Methodology

I. Introduction

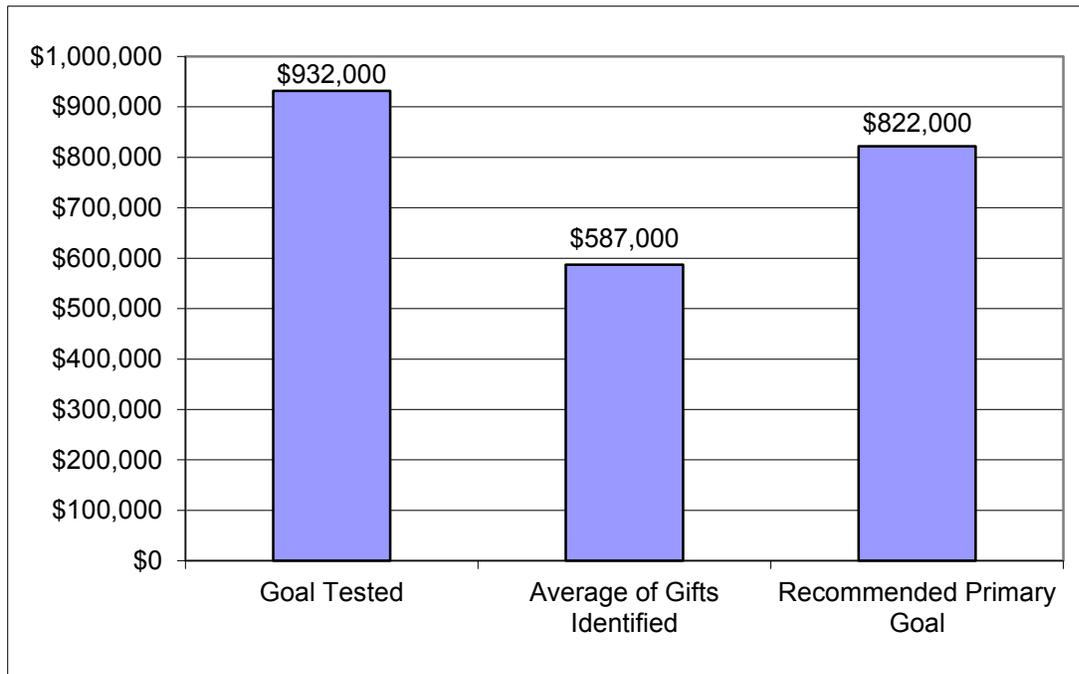
For some time the leadership of St. Wilfrid of York Episcopal Church, Huntington Beach, CA, has been evaluating the parish's programs, facilities, and resources, and assessing the capital needs of the church. After much study and the involvement of many people, the Vestry authorized the Episcopal Church Foundation to conduct a feasibility study to explore the willingness of the congregation to support financially these identified needs.

The facts, findings, and recommendations of the resulting survey, now completed, provide a sound basis for leadership decisions with regard to the future of a fund drive. A complete description of the goals of the proposed plans may be found in the tentative case statement in the Appendix.

II. Conclusions

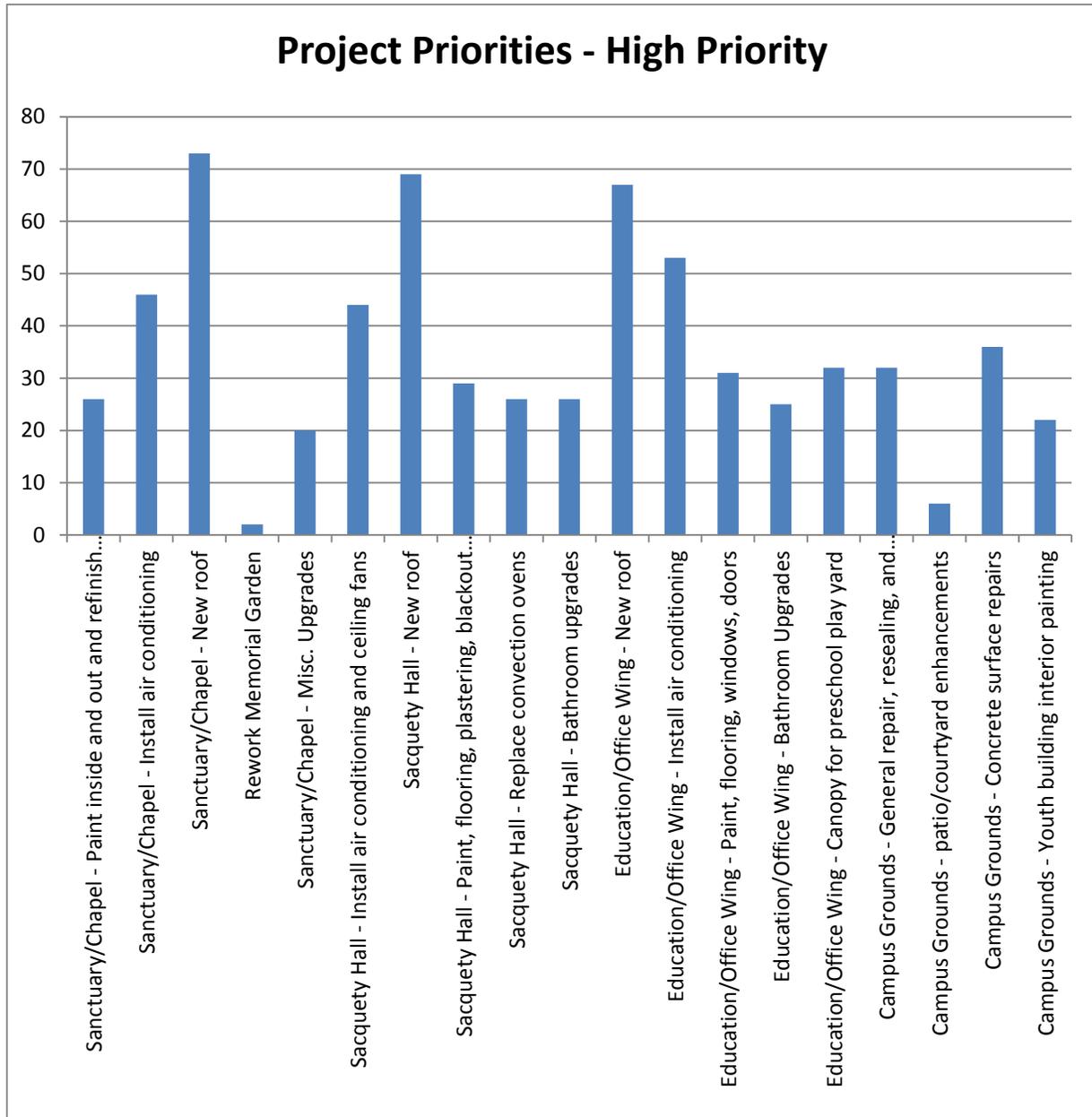
Gift Potential

Experience tells us we can take the average between the low estimate (\$393,500) and the high estimate (\$780,500) of the pre-campaign projections revealed in the Study and multiply by a factor of 1.4 when certain percentages and comments (such as revealed in this study) are attained. Thus the average, \$587,000, when multiplied by this factor (1.4) reveals a suggested goal of \$822,000. This recommendation is made factoring in the reality that additional gifts, not yet identified, will be forthcoming; hence the multiple of 1.4.



Awareness of Need

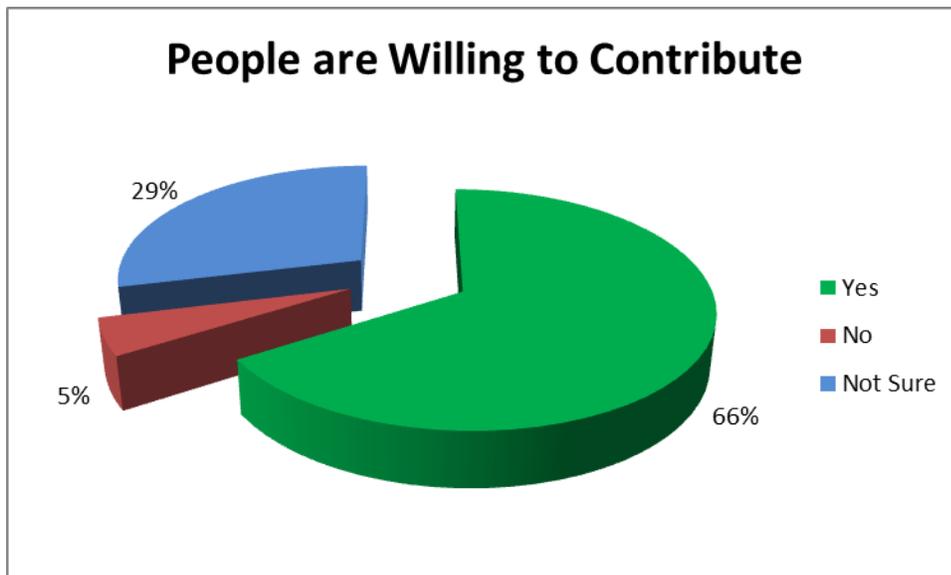
A majority of respondents (59%) were aware that St. Wilfrid of York Episcopal Church is considering a possible campaign, and 74% were also aware of some or all of the proposed plans. Of course, not all the items received the same degree of support. Present awareness of need is a positive; however, each project should be studied and prioritized with consideration given to the degree of support and the resources available.



Interest in and Support for a Capital Drive

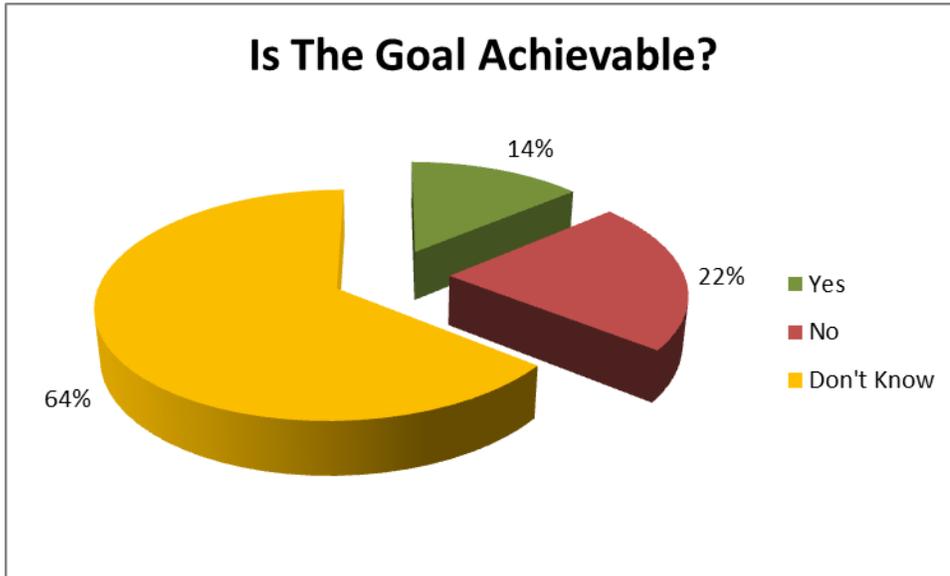
There is significant indication of support for the proposed campaign, but also signs that suggest caution. Positive signs from respondents include:

1. Ninety-two percent are in favor of the campaign, although some with reservations.
2. Only 12% are opposed to the proposed campaign timing.
3. Sixty-six percent of respondents would give to the campaign.
4. Nineteen percent are willing at this early stage to consider a volunteer position.

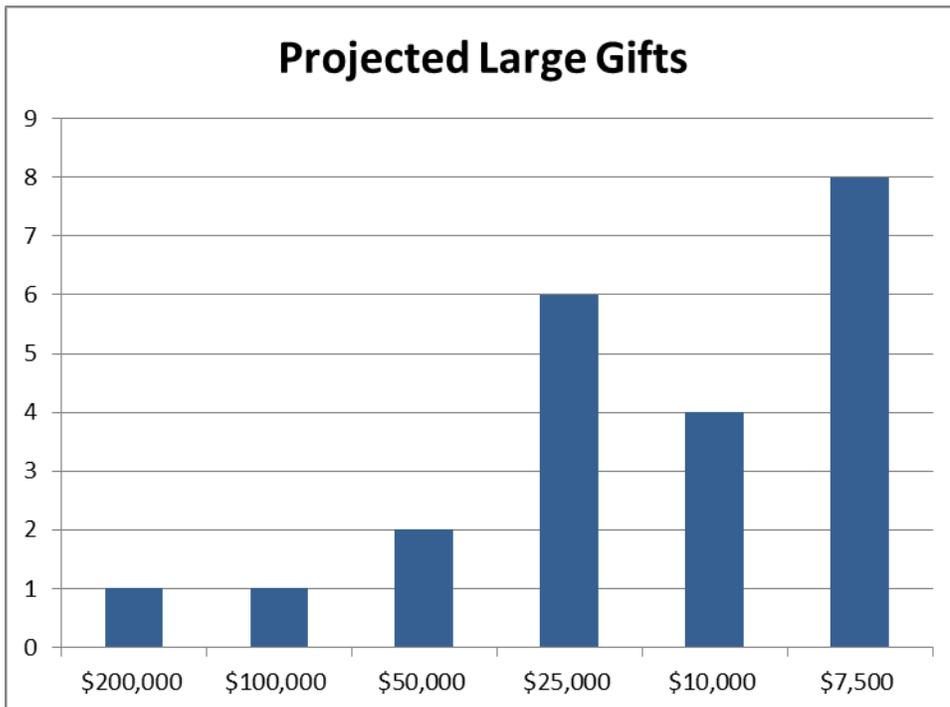


Concerns

1. Approximately 14% of respondents feel the goal is reachable. Twenty-two percent feel it is too high. The remaining 64% had no opinion on whether this goal can be achieved. This is an indication that the proposed goal may be too high.



2. Too few larger gifts were reported at this early date to allow a goal of \$932,000 to be fully embraced.



Influential Leadership

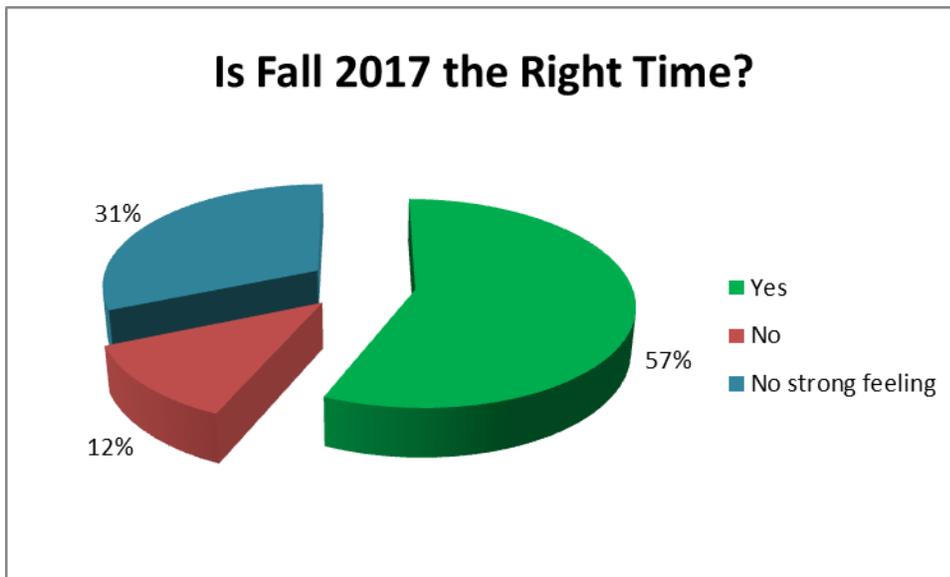
Strong leadership—both financial and volunteer—is absolutely essential for the success of any campaign. A leadership core is presently in place. It is the challenge of this leadership group to expand involvement within the parish, including other individuals who may have significant giving potential. With involvement comes commitment.

Planned Giving

Two people requested planned giving information, and 12 indicated the church was already in their estate plans. This is encouraging and suggests that such future gifts could be used to help build endowment or retire indebtedness.

Campaign Timing

The respondents endorsed the proposed campaign timing. Of course, decisions on the priorities of projects must be made. It is imperative to revisit the proposed plans and make appropriate changes in the size of the effort, the proposed goal, and other sources of funding.



III. Recommendations

Recommendation #1

The information revealed in this Study suggests that a capital campaign for a Primary Goal of \$822,000 is realistic and appropriate. This presupposes that an assertive campaign involving the entire constituency would be launched, and that the type of methodology used by the Episcopal Church Foundation would be followed.

Recognizing that immediate needs are greater than what is revealed in the Study, leadership may wish to consider \$822,000 as the “primary” goal and establish a larger “challenge” goal, which would encourage the congregation to stretch to longer pledges—five years rather than three years, for example.

If the “challenge” was not reached, the congregation would still experience success by achieving the “primary” objective, but hopes would be high that the challenge, at least in part, could be accomplished.

Recommendation #2

Planned giving activities should be pursued during the campaign in an effort to encourage major gifts to underwrite the future of the church. Such gifts, often deferred and received in future years, are helpful in reducing mortgages or indebtedness. The Episcopal Church Foundation is responding to individual requests for information on planned giving.

Recommendation #3

Review the Tentative Case Statement and make final decisions based on the financial feasibility revealed in the Study. Consider also the prioritization suggested by respondents.

Recommendation #4

Share as soon as possible the revised plans with the congregation and seek increased consensus. Increase significantly all publicity concerning this project.

Recommendation #5

Once the leadership has had an opportunity to review the Study recommendations and revise the proposed plan, a timetable such as the following should be considered to maximize success:

Months 1-2	Determine campaign calendar and budget. Announce goal. Begin materials development (pledge cards, brochures, letterhead, etc.). Recruit and train campaign leadership and support committee chairs. Evaluate Advance Gift prospects.
Months 2-3	Continue to train leadership. Complete materials development. Begin Advance Gift solicitation. Contact planned giving prospects, if appropriate.

Months 3-4

Prepare for and launch the Congregational Gift division. Hold kick-off event. Begin personal solicitations and monitor solicitation efforts.

Months 4-5

Finalize all calls. Set up pledge collection and acknowledgment systems. Hold Celebration Event to acknowledge conclusion of the campaign and recognize the leadership and volunteers.

Recommendation #6

Select professional management to guide and direct the campaign to ensure efficiency and the implementation of a proven, successful fundraising methodology.

IV. Methodology

A. The Feasibility Study

As the parish considers a capital campaign, it should reflect on several important questions:

- ◆ What conditions are essential to a successful campaign in the church community?
- ◆ How much money realistically can be raised?
- ◆ Will the church community support a drive that fulfills the goals of the proposed plans?
- ◆ When should the campaign begin, and how long should it last?
- ◆ What volunteer leadership is available to head the campaign?

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

The study was conducted in three phases: research, personal interviews, and direct mail/online.

Phase I

An examination of the proposed needs, development of a “Tentative Case Statement,” determination of optimum campaign goals and timing, and review/selection of personal interview prospects were completed during sessions with the parish leadership.

Phase II

A sampling of parish members was selected for personal interviews. A total of 13 interviews were ultimately conducted by Jerry Campbell of the Episcopal Church Foundation.

Phase III

A mail survey was sent to 54 households. Included in the mailing was a letter requesting participation in the survey, the questionnaire, the tentative case statement and a self-addressed return envelope.

An online survey was sent to 226 households. Included in the mailing was a letter requesting participation in the survey, the online questionnaire, and the tentative case statement.

STATISTICAL NOTE:

- ◆ A total of 54 direct mail questionnaires were mailed to the parish community.
- ◆ Of those, 17 were returned: a mail response rate of 32%.
- ◆ A total of 226 online surveys were sent to the parish community.
- ◆ Of those, 103 were returned: an online response rate of 46%.
- ◆ Including the 13 who were interviewed, 293 units were exposed to the study. Of those, a total of 133 units or 45% participated.
- ◆ Based on experience, this response rate is a good representative involvement from the parish community, lending credibility to the study findings.
- ◆ Of the total that participated, the majority, 61%, attend worship services one or more time(s) per week. Another 23% attend two to three times per week.
- ◆ Regarding the financial-giving practices of those who responded, the majority, 63%, are regular contributors with a written annual pledge.
- ◆ In importance of charitable donations, St. Wilfrid of York ranks as the most important charity that respondents donate to, with 45% rating it as such. Another 42% rank it as in their top five charitable donations.

B. Elements of a Successful Campaign

There are certain elements which must exist in connection with every successful fundraising campaign.

1. Recognition and acceptance of the “tentative needs” as expressed.
2. The case for widespread appeal.
3. Availability of strong financial leadership.
4. The capability of existing leadership to recruit additional support.
5. Past and current support levels for other church-wide capital campaigns.
6. The congregation’s awareness of the proposed plans.
7. The economic optimism of the parish community.
8. Overall response to goal attainability.
9. Indicated interest in contributing to, and projected levels of support for the proposed campaign.
10. Projected timing of the campaign.

These elements are carefully reviewed in this report. The Conclusions and Recommendations Section of this report addresses the elements of success as we consider the readiness of St. Wilfrid of York Episcopal Church to proceed with a major capital campaign.

NOTE: Minor editing has occurred in the comments to ensure grammatical accuracy and preserve the anonymity of the feasibility study respondents. Also, the spelling of some names could not be verified against the parish directory.

Section Two:

**Composite Analysis and Summary of
Personal and
Direct Mail / Online Responses**

Results from 13 Personal Interviews, 17 Direct Mail and 103 Online Responses **Total of 133 Responses**

Note: Not all respondents answered all questions.

Awareness of Need

1. Prior to this survey, were you aware that the parish was considering a capital campaign?

75 Yes 52 No

Fifty-nine percent were aware that St. Wilfrid of York Episcopal Church is considering a capital campaign. This is an indication that the church leadership has prepared the ground for a major capital campaign, but more communication is needed.

2. Prior to this survey, were you aware of the needs as expressed in the accompanying proposed plans?

49 Aware 32 Not Aware 44 Aware of some of the needs

Thirty-nine percent of the respondents were aware of the capital needs of St. Wilfrid of York Episcopal Church. Another 35% were aware of some of the needs. However, 26% were not aware of the needs. This is an indication that the parish needs more communication.

3. Are there additional needs that seem important to you which are not covered by the proposed plans?

Comments:

The ORGAN is missing. We need Wendell back to work on the organ.

Youth building – People need to know that this building is being DELIBERATELY neglected because it might be the site of future expansion/growth and be torn down.

Carpeting in the office is terrible.

Make Sacquety Hall more of a multi-use space.

The need for better acoustics in the main church.

Possibly one more staff person to work in administration. The excuse is that the church administrator is “over worked” but it seems that the well-meaning and dedicated volunteers can't adequately support the needs to administer the parish. No one should be so overworked or pulled so thin that they have difficulty accomplishing/responding to the questions of the parishioners. Everyone is supportive and understands, rationalizes, and excuses, but enough is enough. It is not fair to the administrator or to the parish to have this much work. Perhaps the duties and capabilities should be fairly examined.

Ability to do multi-media presentations in worship space.

Organ needs some repairs done.

My #1 priority is to get the floors swept. I hate wading through trash week after week. The same trash!

I've always hoped that in the future we might have a Primary School. There are more pressing needs at this time, but I keep it on the back burner.

Community outreach. Providing assistance for our own parishioners.

New kitchen appliances.

I wish we could find space for participation in the Diocese's Seeds of Hope program (fruit and vegetable growing on otherwise unused land). I know, I know - there ISN'T much if any unused land!

I am concerned about whether our campus is earthquake prepared, especially older buildings. The codes have probably changed a lot. With the beautiful and valuable stained glass in the chapel, are we protected as best we can be?

Yes, more security cameras placed in and around campus. Also a more secure check in and out process of our preschool.

Landscaping and irrigation update.

Effervescence on the block work in the portico area of the church.

Choir Trip to England in 2018 (Westminster Abbey & Ripon Cathedral), support of Children's Chorister Program

K-6 School.

St. Wilfrid's desperately needs a new sound system in the main sanctuary.

Interest in and Support for a Capital Drive

4. Generally speaking, do you favor the parish conducting a capital campaign as outlined in the proposed plans?

74 Yes

9 No

31 Yes, but with some concerns

More than half, 65%, are in favor of the campaign, with another 27% in favor with some concerns. Only 8% are opposed to the campaign. This is a sign that the church community is willing to support a campaign.

Comments:

Not sure parishioners are willing or able to pledge capital funds when many are not meeting their annual pledge commitments.

Concerns are: willingness of people to step up, internal conflict about the budget, and combined salaries in budget rather than broken out amounts lacks transparency.

Transparency! Who is going to oversee all of this? Where is the money coming from?

Concerned about diluting the annual giving. Overall church attendance and decline – will money needs keep people away? The kind of parishioners we get is changing too. Can we overcome the direction that mainstream churches are going?

Too much all at once!!! I do not see the need for all of these projects. I feel that we are not in need of everything that was outlined. Start with a smaller plan for the most immediate needs. This seems like someone made a wish list that is unnecessary at this time. Do a small campaign now, and then revisit the next needs at a later date.

This is close to a million dollars! We might want to explore ways to increase membership.

We are concerned that the funds raised will be redirected to a social issue project and not towards the restoration of St. Wilfrid's campus.

All repairs should be limited to Sanctuary/Chapel.

In my mid-40's - taxes to pay, private school tuition to pay, college tuition to pay, retirement savings to put away (threat that social security is going away), other smaller charities that are important... How do I contribute more?

Does St. Wilfrid's receive any support from the diocese?

I am very concerned about conducting a capital campaign when the parish continues to operate at a deficit. We are continuously drawing from reserves in order to meet monthly obligations. I believe we should be operating in the black for at least a year before embarking on a capital campaign.

I really don't know but it seems reasonable to have the campaign.

I am concerned about charges for improvements.

It is needed.

Where are the reserve funds?

Suggest major fund raisers, reaching out to the larger beach communities, (i.e major professionally produced choir and orchestra show), for the objective of God, revenue, membership.

As we struggle to operate with the operational budget (i.e. typically are short on pledging funds), we worry about a competing capital campaign. Quite often parishioner input is fixed and we/they may find ourselves in a position where we would need to determine which area of the church to focus our dollars on.

Can we raise the money from our membership?

Do most needed and at a later date try to do those not as necessary.

I understand the capital needs of the physical plant, but how can we support a campaign when we're running a major deficit budget?

5. Please indicate the level of priority you would attach to each of the projects outlined in the proposed plans by checking the appropriate line under each heading. At present, they are listed in no particular order.

**Select only one option per line and feel free to make comments (use an extra sheet if necessary).*

	PRIORITY				
	High	Medium	Low	Opposed	Lack Information
1. Sanctuary/Chapel/Memorial Garden:					
a. Paint inside and out and refinish wood surfaces	<u>26</u>	<u>55</u>	<u>17</u>	<u>1</u>	<u>5</u>
b. Install air conditioning	<u>46</u>	<u>31</u>	<u>21</u>	<u>3</u>	<u>7</u>
c. New Roof	<u>73</u>	<u>22</u>	<u>6</u>	<u>0</u>	<u>11</u>
d. Rework Memorial Garden	<u>2</u>	<u>37</u>	<u>55</u>	<u>7</u>	<u>8</u>
e. Misc. Upgrades (bathrooms, cry room, etc.)	<u>20</u>	<u>36</u>	<u>41</u>	<u>4</u>	<u>7</u>
2. Sacquety Hall:					
a. Install air conditioning and ceiling fans	<u>44</u>	<u>36</u>	<u>19</u>	<u>2</u>	<u>6</u>
b. New roof	<u>69</u>	<u>18</u>	<u>7</u>	<u>0</u>	<u>15</u>
c. Paint, flooring, plastering, blackout curtains	<u>29</u>	<u>44</u>	<u>22</u>	<u>5</u>	<u>8</u>
d. Replace convection ovens	<u>26</u>	<u>32</u>	<u>34</u>	<u>2</u>	<u>17</u>
e. Bathroom Upgrades	<u>26</u>	<u>40</u>	<u>33</u>	<u>3</u>	<u>7</u>
3. The Education/Office Wing:					
a. New roof	<u>67</u>	<u>22</u>	<u>6</u>	<u>1</u>	<u>14</u>
b. Install air conditioning	<u>53</u>	<u>31</u>	<u>12</u>	<u>5</u>	<u>9</u>
c. Paint, flooring, windows, doors	<u>31</u>	<u>48</u>	<u>19</u>	<u>1</u>	<u>10</u>
d. Bathroom upgrades	<u>25</u>	<u>46</u>	<u>25</u>	<u>3</u>	<u>11</u>
e. Canopy for preschool play yard	<u>32</u>	<u>35</u>	<u>22</u>	<u>7</u>	<u>11</u>

4. *Campus Grounds:*

a. General repair, resealing and restriping the parking lot	<u>32</u>	<u>35</u>	<u>34</u>	<u>2</u>	<u>4</u>
b. Patio/courtyard enhancements	<u>6</u>	<u>45</u>	<u>44</u>	<u>6</u>	<u>8</u>
c. Concrete surface repairs	<u>36</u>	<u>45</u>	<u>20</u>	<u>1</u>	<u>6</u>
d. Youth building interior painting	<u>22</u>	<u>42</u>	<u>25</u>	<u>4</u>	<u>12</u>

Comments:

I am at church often and have never noticed that all of these projects were needed! I think some of the proposals are definitely unnecessary!!! I would be fine with a much smaller campaign to take care of the most urgent or most necessary repairs, however, I am NOT in favor of this massive of a campaign.

Are there competing bids?

I favor maintenance of the facility first, then upgrades to the bathrooms.

Can any of these projects be done on a volunteer basis by the congregation?

As a younger member, I want to see money spent on things that would strengthen and build the youth programs. Building Maintenance - need to repair or replace things that will lead to more damage (maybe the roof).

Perhaps some of this work can be done by parishioners on a work day. I thought priority was on increasing our attendance.

Someone put an awful lot of thought into squeezing in as many parking spaces in the parking lot (and is to be complimented on how well they did), but one of the unfortunate results is that some of the spaces are excruciatingly narrow (and with the unintended consequence that a car parked even slightly off dead center sometimes ends up making the adjacent space unusable anyway).

I do not know condition of building structure (roof) but if needed we must replace.

Love the youth and our ministry to them. The youth building is not worth spending any more money on. I think we should tear it down and build a two story youth/education/retreat facility. Granted we'd need more money to make that happen.

Anything that is a danger and/or a potential for injury should and must be done first. Roofing repairs if possible or a complete new roof, where a must, should be done soon. Anything that needs to be fixed or replaced to stop damage should be a priority.

Termite treatment for church is high priority.

Not sure what you mean by reworking the Memorial Garden.

Seems like some of these tasks (like painting Youth Building Interior, etc., could be accomplished by church volunteers. Buy the paint, we'll paint it.

We need to maintain our infrastructure. I think that we need fans more than air conditioning in Saquety Hall.

We can't all have everything we want at one time in our personal lives, either!!

In determining which parts of the proposed case are most attractive to respondents, the following system is used:

*High Priority = 3 points; Medium Priority = 2 points; Low Priority = 1 point;
Opposed to Project = -1 point; Lack Information = 0 points*

The most popular receives the highest number of points.

1. Sanctuary/Chapel/Memorial Garden:

a. Paint inside and out and Refinish Wood Surfaces

78 High Priority 110 Medium Priority 17 Low Priority
0 Lack Information -1 Opposed to Project

Total Points: **204**

b. Install Air Conditioning

138 High Priority 62 Medium Priority 21 Low Priority
0 Lack Information -3 Opposed to Project

Total Points: **218**

c. New Roof

219 High Priority 44 Medium Priority 6 Low Priority

0 Lack Information 0 Opposed to Project

Total Points: **269**

d. Rework Memorial Garden

6 High Priority 74 Medium Priority 55 Low Priority

0 Lack Information -7 Opposed to Project

Total Points: **128**

e. Misc. Upgrades (bathrooms, cry room, etc.)

60 High Priority 72 Medium Priority 41 Low Priority

0 Lack Information -4 Opposed to Project

Total Points: **169**

2. Sacquety Hall:

a. Install Air Conditioning and Ceiling Fans

132 High Priority 72 Medium Priority 19 Low Priority

0 Lack Information -2 Opposed to Project

Total Points: **221**

b. New Roof

207 High Priority 36 Medium Priority 7 Low Priority

0 Lack Information 0 Opposed to Project

Total Points: **250**

c. Paint, Flooring, Plastering, Blackout Curtains

87 High Priority 88 Medium Priority 22 Low Priority

0 Lack Information -5 Opposed to Project

Total Points: **192**

d. Replace Convection Ovens

78 High Priority 65 Medium Priority 34 Low Priority

0 Lack Information -2 Opposed to Project

Total Points: **174**

e. Bathroom Upgrades

78 High Priority 80 Medium Priority 33 Low Priority

0 Lack Information -3 Opposed to Project

Total Points: **188**

3. The Education/Office Wing:

a. New Roof

201 High Priority 44 Medium Priority 6 Low Priority

0 Lack Information -1 Opposed to Project

Total Points: **250**

b. Install Air Conditioning

159 High Priority 62 Medium Priority 12 Low Priority

0 Lack Information -5 Opposed to Project

Total Points: **228**

c. Paint, Flooring, Windows, Doors

93 High Priority 96 Medium Priority 19 Low Priority

0 Lack Information -1 Opposed to Project

Total Points: **207**

d. Bathroom Upgrades

75 High Priority 92 Medium Priority 25 Low Priority

0 Lack Information -3 Opposed to Project

Total Points: **189**

e. Canopy for Preschool Play Yard

96 High Priority 70 Medium Priority 22 Low Priority

0 Lack Information -7 Opposed to Project

Total Points: **181**

4. Campus Grounds:

a. General Repair, Resealing and Restriping the Parking Lot

96 High Priority 70 Medium Priority 34 Low Priority

0 Lack Information -2 Opposed to Project

Total Points: **198**

b. Patio/Courtyard Enhancement

18 High Priority 90 Medium Priority 44 Low Priority

0 Lack Information -6 Opposed to Project

Total Points: **146**

c. Concrete Surface Repairs

108 High Priority 90 Medium Priority 20 Low Priority

0 Lack Information -1 Opposed to Project

Total Points: **217**

d. Youth Building Interior Painting

66 High Priority 84 Medium Priority 25 Low Priority

0 Lack Information -4 Opposed to Project

Total Points: **171**

RANKING BY POINTS:

Sanctuary/Chapel – New Roof	269
Sacquety Hall – New Roof	250
Education/Office Wing – New Roof	250
Education/Office Wing – Install air conditioning	228
Sacquety Hall – Install air conditioning and ceiling fans	221
Sanctuary/Chapel – Install air conditioning	218
Campus Grounds – Concrete surface repairs	217
Education/Office Wing – Paint, flooring, windows, doors	207
Sanctuary/Chapel – Paint inside and out and refinish wood surfaces	204
Campus Grounds – General repair, resealing and restriping parking lot	198
Sacquety Hall – Paint, flooring, plastering, blackout curtains	192
Education/Office Wing – Bathroom Upgrades	189
Sacquety Hall – Bathroom Upgrades	188
Education/Office Wing – Canopy for preschool play yard	181
Sacquety Hall – Replace convection ovens	174
Campus Grounds – Youth building interior painting	171
Sanctuary/Chapel – Misc. Upgrades	169
Campus Grounds – Patio/courtyard enhancements	146
Rework Memorial Garden	128

These rankings do not dictate those projects the church should embrace in the final case statement, but they are a strong indication of what communication and marketing must occur if leadership does elect to support projects that have a lower acceptance rating.

6. If the proposed total goal of \$932,000 cannot be fully funded by a capital campaign, how would you feel if the parish were to assume prudent long-term debt to ensure completion of these proposed plans?

24 Acceptable 68 Undesirable, but acceptable 22 Unacceptable

More than half (60%) responded that it is undesirable, but acceptable to assume long-term debt; 21% said it is acceptable. Another 19% responded that long-term debt is unacceptable.

Comments:

As long as there is transparency and is well overseen.

We have not demonstrated the ability to manage our money; increasing debt is not an answer.

With questions! What would the terms be?

But only for major capital items like A/C.

We need a frank and open discussion about finances; perhaps on a Sunday morning; something more direct; maybe lead by Vestry?

Not without some very careful analysis and the implications for debt service.

We need it, but how many times do we have to do it?!

This is unacceptable! Again, I feel very strongly that not all of these projects are necessary. Plus, more importantly, we need to work on getting younger families into the church. Why spend all this money if membership is down? We have not been successful in strengthening our children and youth programs. Let's put effort back into fixing the programs necessary to have an attractive church that will entice young families to come. It's the congregation that makes the church not the perfect building structures.

Am concerned that "prudent long-term debt" could end up costing the parish too much more in the end.

We cannot meet current budget demands now!

Need to budget within our means.

Can we do more to get the word out about our parish and bring in more people to bring in more tithe?

Our financial situation doesn't seem to be getting better. It doesn't seem prudent to go into.

If we can't afford it we should make cut backs. Tighten our belts.

This is unacceptable because we would be entering into more debt when we are already operating at a deficit.

I understand "prudent" to mean "accompanied by a plan to repay the debt based on a conservative estimate of parish revenue", one not incorporating overly-aggressive assumptions about revenue growth.

Only for the long-term items, such as new roofing.

It is the only way the church will be able to come up with the money unless you start cutting costs.

I'm torn between undesirable and unacceptable. We've run deficits the past few years and I don't see how we would close the budget if we had additional monthly payments of thousands of dollars.

Prefer to limit improvements to the higher priorities that can be paid for without incurring debt.

Pare back the scope of the project.

Most of the world operates in debt anyway.

I would prefer that the church not assume long-term debt.

7. In your opinion, what major positive factors does the parish have in its favor for the proposed campaign?

Comments:

A loving and caring church that is welcoming to everyone.

The community feels like it is their home and are willing to treat it like that.

Longevity; we want it to last; leave a legacy.

Diversity and leadership.

A good spirit here; beautiful facility; people care about each other.

People see the need.

Commitment from community to leaving a legacy.

Education we did was good – need more!

There is wealth in this parish; people love the church and this is important in their lives.

Our campus looks good and we want to keep it that way; generous congregation; we have a good plan here.

A willingness to invest ourselves to improve our welcome.

Widely accepted that we need to upgrade offices, preschool, and Sacquety Hall.

We have a well-used facility; used by us and community. They see the value of this mission.

Excellent clergy.

A well thought out plan.

Generous parishioners.

Determination to keep the success and love of St. Wilfrid's growing.

It is necessary. As in our homes, wear and tear takes over.

We will be continuing to offer a comfortable and inviting space for parishioners and guests to worship.

Straightforward, honest answers with oversight that the work agreed upon gets done and funds not diverted. (I've seen it go otherwise and it caused a major split in the congregation).

We have such a beautiful campus it would be a shame to let them fall any further into disrepair. We need to honor God's call to those who came before us in building our beautiful worship space and continue on in doing the Lord's work here in Huntington Beach.

The real need for the work to be completed.

Committed parishioners.

Maintaining buildings and grounds is important to new, potential members of church.

Updating will help make the place more welcoming to new and returning parishioners.

Growing preschool enrollment.

Supportive members.

Ongoing maintenance appears to be done versus deferred maintenance with a higher cost.

Persons who are dedicated to the future of the parish and feel invested in it.

People with a heart for God and for the parish, plus the reasonable nature of the proposed work (and the bad consequences of putting off some of it - for example, the roofs, air-conditioning for the school).

Again, if all proposed work is needed, by all means we need to repair. I think some of the proposed enhancements could be done in steps over time.

A sense of providing for those who come after us, as those who came before us provided for us. Good spirit of community. Resilience.

Our ministries, active parish, and amazing clergy.

I believe that many parishioners are underfunding the church on their regular giving (i.e. many could give more regularly).

Location, location, location!

I feel that the community as a whole will support this as they are able. There is a lot of love and care for what, to many of us, is our home away from home.

Not sure, but I really feel that the parish has been attracting new and varied members and provides strong community and family support. To continue to do this effectively infrastructure and maintenance to the buildings must be addressed. I'd prefer to see fundraisers, if needed, to supplement capital gifts rather than long-term debt.

There is a great deal of commitment to this campus and congregation. I think with the right campaign we should be able to convince people to increase their giving.

This is very organized and, if presented correctly, it should be well received.

The campus is very much an asset and ripe for extended use. It should be a serious community asset.

Lessen long-term maintenance costs. Attract wider range of rental groups to use our facilities.

Nice facilities worth preserving.

Roofs, heating and air conditioning. Also painting where needed.

Community uses the campus.

Loving and welcoming.

A new roof is essential.

Have some heavy hitters (large pledgers are in parish).

"Great bones", both people wise as well as brick and mortar.

An active congregation.

We have members who are in a position to contribute to a capital building campaign.

Many committed parishioners.

The "insider clique" seems to have a fair number of people who are active, engaged, and (most importantly) well off.

A vibrant and caring congregation.

It has been many years since the last campaign.

8. What problems, if any, do you foresee for this project?

Comments:

Raising the money! (10)

People currently not meeting annual pledge commitments.

People don't like being asked for money.

Generation gap that might slight the needs of the younger generation in this campaign.

Some regret that in the past property was sold that could now be generating income.

How is the new openly gay associate going to be received by parents in the preschool?

Inadequate pastoral care is being provided in some instances. What happened to Stephen Ministry?

St. James saga lingers and MA on the standing committee complicates things.

Not sure people understand the importance of giving; low commitment church. (2)

We need a long-term prudent vision for the campus.

Financing.

Unanticipated additional costs.

Communication is a problem here. How do we get a message to everyone?

Financial fear; uncertainty.

Are we motivated? Will people be able to get past their inertia?

Fundraising is going to be challenging.

Follow through on pledges.

It is too expensive.

People on very limited incomes always feel like what little we give is never enough. This isn't always kept secret by the people who count each week. This is very wrong.

Economy and age of parishioners.

Lack of regular small givers.

Unforeseen economic troubles, either from donors or the general economy.

Cost overruns. I worked in the business/accounting department for a school district and know there are often low bids and huge change orders. It is a concern and I would want some assurance there are change order restrictions in place.

Sticking to a budget. Getting consensus on which or all items to be done. For example, in my humble (not being sarcastic....really am humble) opinion, could we save a bit by only using ceiling fans and not putting A/C in Saquety Hall? Lots of doors, nice ocean breeze. A/C essential in all other buildings.

Falling short of fiscal goal for the project.

Possibility of piecemeal work that does not coordinate the entire campus.

Need for professional design coordinator to ensure appealing and consistent appearance.

A large elderly population on fixed incomes.

This is a huge transition time for the parish, losing Gina and getting a new priest. Christopher Gravis is leaving with transition from the music program. Lots of people come for this music, will they leave? Are our parishioners being fully fed spiritually?

Cost overruns.

I am concerned about costs and being able to pay for them.

Cost and debt.

It seems there is already a challenge to meet the needs of the annual budget.

It failing due to lack of money and interest.

Member's limited resources to support the parish.

We need more people. Hurts to keep asking the same people for more money.

Difficulty getting commitments to support this campaign.

Being able to afford the cost.

Debt.

This is a big number; probably many in the parish are strapped financially and already giving as much as they are able. I know that if the project goes forward - hard to see how it could not, in some shape or form - ours is mostly likely to be one of the "many small gifts" listed in the tentative case study.

It's human nature to put things off until an emergency arises (why fix the roof if it's not raining?), even though that usually costs more in the long run.

What will be the interruption to activities/worship? Can the congregation as it exists handle the expense?

Money. Many parishioners benefit from our church but do not pay their fair share.

There will be some loss of membership.

Lack of commitment.

Personal sacrifice. Plans and permits. Unanticipated improvements that may be triggered when applying for permits.

It seems like most years we are behind in collecting our pledges, offerings, and often are operating close to a danger level.

A large percentage of our congregation are unwilling to pledge at a level more than a few percent of their total household income. If we can't cover our annual operating costs how are we to succeed in a capital campaign?

Rising costs and lack of committed financial support by all who use these facilities.

We are a parish with a majority of retired people on fixed incomes, many of whom will find it difficult to allocate funds for a capital campaign. Difficult meaning giving up some basic necessities, not luxuries.

Funding the work.

Declining attendance.

Money without taking out from reserve funds.

Aging congregation already giving a lot extra and current budget shortfalls.

Parishioners not understanding the crucial nature of certain projects.

Getting heavy hitters to fork over money.

Parishioner's income and giving being a fixed amount which would put them in the position of having to choose where to give their offerings.

People not following through.

I am concerned that aspects of the project would be attempted as cheaply as possible using volunteer labor, with less concern about quality, longevity of the improvements, or aesthetic value.

9. What added ideas or suggestions do you have which might be helpful to the leadership in making this important decision to consider moving forward with the campaign?

Comments:

Outreach to the city of Huntington Beach.

The leader of the campaign needs to be filled with enthusiasm and be someone that people know.

Keep young people involved!!

Commit to openness and transparency.

Build some unity in the congregation; help develop personal spirituality; more things like EFM.

We need new younger people in leadership.

Have a downsized plan ready – a Plan B.

Communicate! Tell the story.

What do you do for your own home? What can you do for your spiritual home?

Make it clear that there are long-term plans for the campus.

Let's not see this as an all or nothing process.

No debt!

Cut back the expensive music program. A lot of money is spent there for peoples own gain.

Will we lose people based on being asked to give more and more money? I pledge money and time every year, but have been frustrated when my voice is not heard. Now you are asking for more money? Sorry, but I will not be giving to this campaign until there are improvements in church programs that have been discussed for way too long but are not being supported by our rector.

Our family is desperately saving for three kids who will all be in college at the same time. We would be able to give more money in the end if we could do it over a longer period of time. Would that help to reduce the per month "sticker shock" to others as well and thus get more households to join in the end? When I saw the lump sum amounts, I was horrified. But, when I saw it broken down into monthly payments I thought, yes...we could manage that. Psychology is important! Hope this helps and thanks for your service.

Realistic goals based on feasibility study results.

Shouldn't the preschool pay for the covering? What are the preschool financials and are any of the monies from the preschool going to help pay for upgrades to their area?

I am in favor of enhancing the structures that are bringing in capital for the church at this time such as the school, the meeting rooms where 'outside' meetings are held, the offices where our staff works daily.

Air conditioning is very important for the children at the preschool and also in the hall. Updating the hall and youth centers seems very important. I would need more info on the roofing and other projects. Painting the church would be a big difference.

Re-evaluate all ministries. Possibly focusing on fewer to help lower financial requirements.

Prioritization of the institutional organization that actually sustains the parish financially (preschool). Hiring leadership conducive to growing and sustaining an EPISCOPAL parish.

Fundraising events.

Good luck; asking for contributions is never easy. People want to see a return on their investment.

Would all work be put out to bid? Would any members of the church be able to help with the improvements, such as painting, reworking the garden, etc.?

Operate in the black for at least a year before embarking on this campaign. Do not incur any more debt.

None at this time, but I will pray on this and try to be more involved in the process, and will be more consistent with my contributions.

Could we consider breaking this down into smaller consecutive campaigns over a period of years, considering physical facts related to the need for individual pieces of the work (and consequences of delaying each piece) and the extent of parish support for various pieces?

Just do it.

Decide, through prayer and discernment, what God is calling this community of faith to do. Then step out in faith and do it.

Communication is important. Be open and honest.

Show people the peeling paint and flooring. Take them over to the pre-school bathrooms. Show them the cost savings on the new air conditioning and return on investment. Have random speakers from all the groups that use the facilities address the congregation during announcements.

Do not rule out fundraisers that engage the entire beach community. We have the talent, let's use it. Professionally promote the choir, and other musical talent (i.e. You Tube advertising revenue).

I trust our leadership that these projects are necessities. I want St. Wilfrid's to thrive. This parish has been good to, and for, me. I took part in the mini-meetings we had this summer to educate parishioners and gain our buy-in. To raise almost a million dollars over three years is a challenging goal. If we all shared equally, that would be about \$4,000 per family, or \$1,333 a year. I know for a fact that I can't do that. I'm a family of one, as many of us are. The best I can do is the \$28 a month for three years, at least to start with, and if my financial picture improves, then I will do more. I am totally against borrowing money to complete all projects if the full amount isn't raised through the campaign. Going into debt is not the way to go: if it takes longer to do everything, then that's the way it has to be.

Activities to promote this campaign by making people in and out of the parish aware of its capabilities and assets.

Do what is necessary to make campus safe and secure, such as roof repairs and internal building improvement repairs.

Very, very open communication of the costs and need of the projects.

Line up heavy hitters, as pledges before asking rest of parish, and say what has been pledged by them as a total.

Perhaps there is a way to do some fundraising outside of the church, although we don't have any brilliant ideas at the moment.

Establish financing before starting.

Accepting and letting it be known that the most important will be taken care of and the other part can wait until a later date.

Can a special trust fund or escrow account be opened and substantiated?

Set up a communication system to go on the internet for both the services as well as for personal messages from clergy. Try to raise capital from internet resources.

If all of us pitch in a little, there will be no problems. A little goes a long way.

Leadership

10. If asked, would you be willing to work on a committee in support of the proposed capital campaign?

22 Yes 48 No 49 Not sure at this time

Nineteen percent would be willing at this early date to volunteer. Another 41% are not sure at this time and may be persuaded to participate as the campaign plans are formulated. This is a relatively good response at this stage in the process. It appears likely that an adequate number of workers would be attracted to the campaign.

11. Among individuals you know, who would make an ideal chairperson for this proposed capital campaign?

Jeff Campana	7
Jerry Campbell	
Dave Dorff	2
Pam Dorff	2
Vicki Farnsworth	
Leith George	2
Alex Hamlin	
Allison Hainlen	4
Lynn Horton	
Roger Leach	
John Lim	
Bill Lindsey	3
Stuart Lumb	5
Patty Nunn	
Jim O’Connell	2
Jane Pape	
Joan Pashley-Baynes	6
Luke Spak	
Amy Wilkerson	
Derek Wimmer	7

Someone who is charismatic, enthusiastic, a good communicator, sound business sense or if not... able to surround with people who are, "plays well" with others, firm but not rigid, driven by God's love and not ego...although...a little ego sure can get stuff done!

I would hire from outside... no one here is a proper development specialist.

12. Hypothetically, if you were the chairperson, who would you select to serve with you?

John Bailey	
Jeff Campana	4
Marcia Cray	
Nancy Davies	
Bill Dawson	2

Pat Dawson	
Dave Dorff	2
Pam Dorff	5
Jeff Eichinger	
Michelle Eichinger	
Steve Farnsworth	
Vicki Farnsworth	
Larry Garcia	
Leith George	
Chris Gravis	
Bruce Groth	2
Laura Groth	
Allison Hainlen	5
Scott Hainlen	
Alex Hamlin	
Kathleen Iverson	
Denise Kaprielian	
Larry Kaprielian	
Roger Leachman	2
Joe Lim	2
Bill Lindsey	2
Patti Lumb	
Stuart Lumb	2
Sharan Mercer	
Steve Nadolny	
Patty Nunn	2
Jim O'Connell	
Jane Pape	2
Joan Pashley-Baynes	4
Jim Schweitzer	
Don Sinclair	
Luke Spak	
Rob Tenace	
Lily Tisu	
Tom Wesley	
Derek Wimmer	5
Sue Wimmer	

An excellent communicator who "plays well" with others, with charisma which would motivate people to give. We need a "dream team". Our entire congregation is one BIG dream team! Would it be useful to have at least one non-parishioner for objectivity?

A preschool representative.

A head person or involved adult in the youth and preschool area, also people from the church. I would want people from each area that these projects affect so that we can get input and needs met.

I think the chairperson should be a member of the laity.

Those that know/understand construction, those that would prayerfully consider all options.

Campaign Timing

13. Do you know of other current or projected capital campaigns in the community that might have an impact on the success of this proposed effort?

Beach Cities Inter-Faith Services - BCIS (8)

Choir traveling to England next summer (3)

Possible organ needs

Music Guild fundraising activities

14. Does a proposed solicitation period for pledges in the fall of 2017 seem appropriate to you?

65 Yes 14 No 36 No strong feeling

More than half of the respondents, 57%, are in favor of the proposed timing. Thirty-one percent expressed no strong feeling one way or another. The remaining 12% were opposed to the campaign timing. This is an endorsement that a campaign could proceed as scheduled.

Gift Potential

15. How would you describe the present economic climate in your community?

3 Excellent 62 Good 47 Fair 2 Poor

Fifty-four percent of the respondents to this question believe the present local economy is good, 41% consider it fair. Three percent believe it to be excellent, and 2% of respondents rated it as poor.

16. Is the present economic climate improving, remaining the same, or declining?

25 Improving 63 Remaining the Same 24 Declining

Indications are that the local economy is remaining the same, with 57% rating it as such. Another 22% believe it is improving, and 21% believe it is declining. These responses express economic optimism. When people feel the economy is good, they are more apt to make gifts.

17. To attain the proposed goal, substantial leadership gifts would be required. Do you know of any individuals, foundations, or other sources that might support these proposed plans? If you have a personal tie to any of these, would you be willing to make an introduction to them of the campaign leadership? If so, please indicate and we will be in touch once the campaign goes forward. (Please include mailing address, phone number, and email address if possible.)

A confidential listing of responses has been provided to leadership.

18. Do you think a goal of \$932,000 (as outlined in the proposed plans) can be raised in gifts and pledges?

16 Yes 25 No 74 Don't Know

Only 14% believe the goal can be attained, while another 64% have no opinion if it can be reached. Another 22% do not believe the goal can be attained. Normally, we like to see at least a majority believing the goal is feasible. Generally, when less than half are confident about the projected goal, the proposed goal is usually too ambitious.

If no, how much do you think can be raised?

\$200,000 (2)

\$300,000

\$500,000 (3)

\$600,000

Half to three-fourth

**19. If convinced of the need, would you be willing to contribute to this proposed campaign?
(All gifts, regardless of size, are needed and are important to the success of the
proposed campaign.)**

78 Yes 6 No 34 Not sure at this time

Sixty-six percent would be willing at this early date to contribute to the campaign, while another 34% expressed that they are not sure at this time. Only 5% indicated a negative response. This is positive and an indication that the campaign can proceed.

20. If "yes," please estimate your possible total range of giving. Gifts potentially could be paid over a several-year period. *This is not a pledge or in any way binding.*

<u>11</u> \$500 or less	<u>10</u> \$500 to \$1,000
<u>20</u> \$1,000 to \$3,000	<u>11</u> \$3,000 to \$5,000
<u>8</u> \$5,000 to \$7,500	<u>4</u> \$7,500 to \$10,000
<u>6</u> \$10,000 to \$25,000	<u>2</u> \$25,000 to \$50,000
<u>1</u> \$50,000 to \$100,000	<u>1</u> \$100,000 to \$200,000
<u>0</u> \$200,000 and above	

**Typical Gifts Essential to the Success
of a \$932,000 Capital Campaign**

Size of Gift	# Needed	Gifts Indicated in Study*
\$200,000	1	1
\$100,000	1	1
\$50,000	2	2
\$25,000	4	6
\$10,000	6	4
\$7,500	8	8
\$5,000	22	11
\$3,000	42	20
\$1,000	70	10
\$500 and below	Many	11

*Using the high range estimate

Respondents projected donations ranging from a low of approximately \$393,500 to a high of \$780,500. While not indicated in the chart above, not all gift amounts were given within a range as presented. Some were given as singular amounts, e.g., \$5,000, instead of \$3,000 to \$5,000. The high and low estimates have been adjusted accordingly. These early estimates fall short of supporting \$932,000 as a primary goal.

Planned Giving

21. In addition to making a gift to the proposed campaign, some parishioners may wish to explore planned or legacy gifts. Check the blank next to the item(s) of interest. Materials will be sent to you from the Episcopal Church Foundation via e-mail.

- I would like to join the Legacy Circle at St. Wilfrid's by including the parish in my will or estate plan.
- Create a charitable gift annuity (minimum gift of \$5,000).
Benefits of a charitable gift annuity could include:
- receive guaranteed income for life (i.e. current rates of approximately 4.7% annually at age 65, approximately 5.8% annually at age 75)
 - receive an income tax deduction now for the gift portion
 - receive some tax-free income from the investment until your life expectancy age
 - possibly reduce applicable estate and inheritance taxes
 - enjoy the satisfaction that at the death of the final income beneficiary, the remaining principal would go to an Episcopal congregation or entity you designate
- Create a Charitable Remainder Trust with appreciated assets (minimum gift of \$100,000)
- Create a Pooled Income Fund gift for life (minimum gift of \$2,500)
- Donate appreciated real property such as a house, vacation home, farm or business
- Send me the *Overview of Planned Giving* brochure which explains planned gift options further
- Add me to the Episcopal Church Foundation e-newsletter on estate planning.

21a. I am already a member of St. Wilfrid's Legacy Circle by virtue of having included the parish in my will or estate plan.

Twelve individuals have already included the church in their estate plans. Two others have indicated they would welcome information. They will receive information confidentially from the Episcopal Church Foundation.

A Final Word

The Episcopal Church Foundation thanks the leadership of St. Wilfrid of York Episcopal Church for the opportunity to work with the parish family. We enjoyed our work on your behalf and would welcome the opportunity to be of service.

Thank you, and best wishes.

Section Three:

**Appendix I:
Tentative Case Statement**