

## INTRODUCTION

In January 2007, Our Lady of Grace Catholic Church, Encino, California, retained Guidance In Giving, Inc., to conduct a Planning Study for a proposed major capital fundraising campaign.

Mr. Carlos H. Proaño, Vice President, conducted the pre-study preparatory work including the production of a survey questionnaire and development of a computer database program (Planning Study CMS) to record study findings. Mr. Kevin B. Engler, Account Executive, directed the Planning Study by conducting personal interviews, processing accumulated information from parishioners and parish families, and recording all data in the Study CMS during the six weeks of the study.

The findings of the Planning Study form the basis of this report and the recommendations are based on the experience of Guidance in Giving, Inc., in the field of non-profit, Catholic fundraising and development.

The primary purpose of this Planning Study was to determine the potential financial support and feasibility for a proposed capital campaign that would attempt to raise from \$3,200,000 to \$3,600,000 for renovations and improvements to the parish and school at Our Lady of Grace.

A second purpose of the Planning Study was to identify campaign leadership candidates and volunteer workers, and to evaluate the potential giving among the registered 2,800 parish households should a major capital fundraising campaign be implemented in the near future.

The six-week Planning Study officially began on January 22, 2007, and concluded on March 2, 2007. Working with Father Austin Doran, Pastor, and members of his Parish Staff, the firm (Guidance In Giving, Inc.) produced a personal interview and direct mail survey questionnaire.

Personal interviews were arranged by the Parish Staff of Our Lady of Grace Catholic Church with a cross-section of registered members of the parish. An invitation letter to participate in the personal interview process was mailed to prospective interviewees under the signature of Father Austin Doran, Pastor. Follow up phone calls and the scheduling of interviews were conducted by members of the Parish Staff.

The parish mailed out 175 invitation letters in an effort to arrange between 75 and 100 confidential, personal interviews. Responses were very good to Father Doran's request. A total of 82 personal interviews with a cross-section of Our Lady of Grace Catholic Church's parishioners has been conducted by Guidance In Giving, Inc. All personal interviews were held at the Parish Office of Our Lady of Grace Catholic Church.

Each interview consisted of 20 single or multi-part questions. However, many spin-off questions were asked and/or addressed during the process of each individual interview. Prior to each interview, Guidance In Giving, Inc.'s policy of preserving confidentiality was explained to each personal interview respondent. And each person interviewed was informed that quotes might be used in the final report for emphasis, but would not be attributed to any individual.

In addition, direct mail questionnaire surveys were mailed on February 2, 2007, to more than 2,600 registered parish households listed on the parish database. Furthermore, an In Pew Survey solicitation was conducted on "Survey Sunday," February 18, 2007. Through Thursday, February 22, 2007, the deadline date for returning completed direct mail survey/in pew questionnaires, a total of 154 completed survey forms had been returned to the Parish Office. The return rate of the direct mail questionnaires/in pew survey forms was 5.9%, which is within the minimum 5-10% return range that Guidance In Giving, Inc. typically receives among parishioners surveyed.

Guidance In Giving, Inc., believes that it is important to realize the distinct differences between the responses received during the personal interview process and the responses received from the direct mail survey. During each personal interview, the

firm's representative is able to have an in-depth, confidential conversation with the personal interview respondent. During this discussion, there is information exchanged by both parties.

Through this exchange, an education and awareness process takes place between both parties that can include an array of issues. These issues normally include opinions regarding the parish's image – i.e., how the parish is perceived by its parishioners. It can also include personal biases the personal interview respondent has about the parish.

Moreover, personal interview respondents may speak of concerns that they believe may conflict with the proposed capital campaign, if started in the near future by Our Lady of Grace Catholic Church. In contrast, respondents to the direct mail survey questionnaire will answer questions with limited knowledge, insight, and information. Therefore, all responses should be weighed with these factors in mind.

In the following pages of this report, Guidance In Giving, Inc. will present the findings of the Planning Study, evaluate Our Lady of Grace Catholic Church's current status in lieu of a proposed capital campaign, and offer recommendations regarding the possibility of inaugurating a capital campaign in the near future. In short, this report will present results from the information received from all respondents who participated in this study.

Guidance In Giving, Inc. wishes to express appreciation for having had the opportunity to work with Our Lady of Grace Catholic Church. We especially appreciate the advice, cooperation and assistance of Father Austin Doran and his Parish Staff during this study.

## METHODS OF STUDY

The purpose of each personal interview was to determine the attitudes of Our Lady of Grace Catholic Church parishioners regarding the proposed capital fundraising campaign, and to seek their advice on a number of important issues. Specifically, the interview process was designed to accomplish the following:

- To determine the support for a major capital campaign.
- To test possible support for the elements of the proposed case statement.
- To protect Our Lady of Grace Catholic Church against an ill-advised, negative experience.
- To develop awareness of the campaign goals and objectives on the part of all parishioners of Our Lady of Grace Catholic Church as they were individually interviewed.
- To formulate a plan of action that would be advisable and workable with respect to the findings of the Planning Study.

With this in mind, Guidance In Giving, Inc., conducted a Planning Study for Our Lady of Grace Catholic Church to determine answers to the following questions:

- What elements (under consideration) should be incorporated into a final campaign case statement for Our Lady of Grace Catholic Church?
- What do Our Lady of Grace Catholic Church parishioners believe are the priorities that should be addressed by the campaign?
- Do the proposed elements include everything that should be incorporated into a final campaign case statement for Our Lady of Grace Catholic Church?
- Would the annual “Together In Mission” appeal of the Archdiocese of Los Angeles cause a conflict with a campaign at Our Lady of Grace Catholic Church?

- Are there other issues that might conflict with a campaign at Our Lady of Grace Catholic Church?
- At what level should the monetary campaign goal be set at in dollars? (Our Lady of Grace Catholic Church wants to be certain the campaign goal is challenging, yet realistic and attainable.)

As previously stated, the Planning Study primarily consisted of 82 confidential, personal interviews with a cross-section of Our Lady of Grace Catholic Church parishioners. Those selected by the Parish Staff to be interviewed were “active” individuals and couples believed to provide the best insight and information for producing a pre-capital campaign prospectus.

In addition, a survey questionnaire was developed and mailed to more than 2,600 parish households on February 2, 2007; and an In Pew solicitation was conducted on Sunday, February 18, 2007. Together, the mailings and in pew solicitations stimulated 154 responses. All respondents were invited to rate each element of a possible campaign case statement; and offer confidential remarks on other issues they believe are of importance to this study.

Guidance In Giving, Inc. believes the net results of both methodologies incorporated in the Planning Study – personal interviews and direct mail/in pew respondents – are the honest, thoughtful reflections and perceptions of Our Lady of Grace Catholic Church by each parishioner (a.k.a., respondent) that participated in the study.

## THE PLANNING STUDY FINDINGS

### *Breakdown of Planning Study Respondents:*

#### 1. How long have you been a member of Our Lady of Grace Catholic Church?

<i>No. of years in parish:</i>	<u>1-9</u>	<u>10-19</u>	<u>20-29</u>	<u>30-plus</u>
<i>Personal Interview Respondents:</i>	17.1%	34.1%	15.8%	33.0%
<i>Direct Mail/In Pew Respondents:</i>	44.2%	30.0%	7.4%	18.4%

#### 2. What ministries, programs and/or activities are you involved with?

Below is a listing of the ministries, programs and activities that personal interview and direct mail/in pew survey respondents told Guidance In Giving, Inc, they are or have been involved in at Our Lady of Grace Catholic Church and School:

*Impact, Bible Study, Usher, Choir, OLG Seniors Group, Eucharistic Ministers, Pastoral Council, Sacristan, PTO, Lector, Family Liturgy, School Parents, Former Pastoral Advisory Council Chair, Fair, School Activities, CORE, Environment, Greeter, Scripture Class, Spanish Ministry, Catechist, Parish Council, Charismatic Prayer Group, Ushers, Men's Club, Finance Council, Beyond Renew, School Activities, Boy Scouts, Sunday Collection, RCIA, Social Justice Group, CCD, St. Vincent de Paul, Marthans, Day Care Center, Weberettes*

#### 3. In your opinion, what does the parish do well?

*Comments Received: (in no particular order)*

*OLG creates a loving environment.*

*OLG is an all-inclusive parish. Race and wealth are non-factors here.*

*OLG is a very welcoming parish.*

*The priests are readily available when parishioners are going through difficult times.*

*OLG is a warm, caring parish. Our confirmation program is excellent.*

*We're a welcoming community that offers opportunities for people to grow in their faith.*

*I think we do so many things well.*

*The parish and pastor do a great job of making people feel welcome.*

*Our parish truly fosters community spirit.*

*Very welcoming. It's a nice place to worship.*

*Father Austin is doing a great job!*

*Good masses, friendly people and a nice fair.*

*The priests are charismatic. I love their homilies.*

*The parish strives to provide a variety of pastoral programs and ministries.*

*We have a very welcoming parish that allows lay persons to administer.*

*We have a diverse parish that offers a warm, welcoming environment for parishioners.*

*The parish offers many needed ministries and is very welcoming.*

*Our Lady of Grace has a strong sense of community and family.*

*Father Austin is a most generous and wonderful pastor and leader.*

*The school is vibrant, and the parish is committed to the school.*

*The parish communicates well with its parishioners.*

*The parish offers many programs for our youth and adults.*

*The parish promotes a sense of community.*

*We have a welcoming parish and a caring pastor.*

*Bible study and Impact groups for all ages.*

*Beautiful liturgies, masses and music.*

*We have many outreach groups and services.*

*Our pastor is outstanding and the liturgies are inspirational.*

*The parish provides excellent counseling and responds to those who are sick or grieving.*

*We have a very warm, welcoming community.*

*Everything. The priests are very personal.*

*Many things: Masses, homilies, and a friendly parish.*

*Father Austin does a good job at involving the whole community.*

*Father Austin is a gem. He's carried on in the same manner as our former pastor.*

*Father Austin communicates very well with parishioners.*

*Father Austin is very passionate at what he does.*

*Father Austin gives wonderful, meaningful homilies directed at life issues and problems.*

*Father Austin is very good at building a welcoming parish community.*

*We have the greatest Pastor! The parish has many programs that bring people together.*

*We have good ministries and liturgies.*

*There is a wonderful togetherness among the parishioners and priests.*

*We have great priests, a good school and a wonderful choir.*

*We have many ministries that reach out to all parishioners — youth and adults.*

*OLG tries to be all inclusive.*

*We are a very welcoming parish and pastor, and we have a wonderful choir.*

*OLG is a very welcoming and generous parish.*

*Our annual fair raises \$100,000 for the parish and school.*

*There's a good sense of community at OLG.*

*There are many activities for kids.*

*Very warm and friendly members and priests.*

*Many programs and activities.*

*“Great community spirit.”*

*I think we really try to meet the needs of all our parishioners.*

*It's a very spiritual place.*

*The priests and parishioners are friendly and the liturgies are beautiful.*

*It's a very friendly parish and Father Austin is a wonderful priest.*

*Wonderful masses and priests.*

*Education, both parish and school.*

*OLG reaches out to parishioners and takes care of people's spiritual needs.*

*There's a genuine sense of community at this parish.*

*Education, retention of parishioners and fundraising.*

*Provides worship opportunities to those who live in the greater community.*

*Children's Mass on Wednesdays.*

*Liturgies are outstanding!*

*Masses and events are excellent.*

*Our priests are visible after every Mass.*

*OLG is a well run church.*

*Making people feel welcome and part of the parish.*

*Reaching out to people from all walks of life.*

*Different ministries for all people.*

*It provides a good school with a certified staff that offers a stable environment.*

*Parish organization, outreach and a welcoming spirit.*

*It appears the parish is well organized.*

*Community-forming events such as Heritage Night and Impact Dinners*

*Our parish brings the joy of the Roman Catholic Faith into the hearts of parishioners.*

*There's a "family" atmosphere here.*

*There's a friendly atmosphere and the Pastor is the best, most intelligent we've ever seen.*

#### **4. In your opinion, where does the parish need to improve?**

***Comments Received:*** (in no particular order)

*We could use a parish gift and book shop.*

*We could use some more social events and gatherings.*

*I'd like to see a Women's Spiritual or Book Group started.*

*How about a Bereavement Ministry?*

*Programs for seniors are limited. We also need a room for Parish Archives.*

*"We're filling seats, but not filling the parish bank."*

*We have so many people who only come to Mass.*

*There must be some way we can get people more involved.*

*Church lavatories need upgrading.*

*We need to improve restrooms in the church.*

*Everything 20 years and older to the parish and school physical plant.*

*Family oriented programs after Masses.*

*Church bathrooms, a bridal room, and consider renting Parish Hall for weddings, etc.*

*Parking, Leader Formation, Meeting Rooms*

*The parish needs to implement more activities for teenagers.*

*We need to do a better job communicating our parish "upkeep" costs to parishioners.*

*It's hard to find fault with a place we love.*

*I'm concerned about our attendance at Mass and the declining enrollment at the school.*

*We may need to explore other options regarding our liturgies?*

*The 6th-8th graders are treated like grammar school kids, not like middle schoolers!*

*Maybe more outreach to our community.*

*Improve youth program for high school and college students.*

*Our parishioners need to put forth more effort greeting their fellow parishioners.*

*We need to find a way to get more involvement from the Latino community.*

*We need to assist hearing impaired people by installing ear phones in the pews.*

*We need to get more parishioners involved/active in parish activities and events.*

*We need to find a way to get the Spanish community more involved.*

*Parish Office needs to perform in a more timely manner and be more efficient.*

*I don't like seeing that the parish spends more than it receives each month.*

*We need to encourage involvement in religious vocations.*

*Maybe we could have a better place for the "after Mass" social area?*

*We need to increase attendance, especially among younger families.*

*We need to find a way to increase our weekly collection.*

*We need to do a better job reaching out to our young people.*

*We could use a "welcome" process and a ministry for widowed/divorced parishioners.*

*We don't enjoy the music, but the choir is beautiful.*

*We need to find a way to get our teens more involved in our programs.*

*I'd like to see us develop some retreats for men and women on adult spirituality.*

*The school needs to rejuvenate a love for learning from the teachers on down.*

*Many people drop a dollar in the collection, when they should contribute their fair share.*

*More classes for seniors.*

*Increase the parking.*

*Maybe a youth group for teenagers?*

*Provide help for abused kids.*

*Father Austin needs to have more involvement in the school.*

*Homilies need to be more "down to earth."*

*The school and parish need to be better united.*

*I would like to see the parish return to the Roman Catholic Mass.*

*There's too many people walking around with kids during Mass.*

*We need to do a better job visiting people who are in need.*

*More family activities and fundraisers.*

*More programs directed at poor people.*

*A soup kitchen for the poor and homeless.*

*The ministry program needs to be in a separate building away from the school.*

*We need to get a greater number of parishioners involved, registered and contributing.*

*Everyone should be contributing "something" on Sundays, even if only \$5.00.*

*Youth programs and confirmation are boring!*

*Update the music selections.*

*Keep Mass times within limits so parking/traffic is not a hassle.*

*Bring the Hispanic and English Mass participants together for a bilingual Mass.*

*We need to do a better job utilizing the space we have.*

*A better parish music program.*

*The teachers, coaches and assistants should all be credentialed in child education.*

*Offering a Sunday evening Mass might draw well.*

*I think we need more community involvement that gets OLG on the 5:00 news.*

*I can't think of anything.*

**5. What is your opinion/ranking of the following:**

For Question #5, parishioners were asked to rate the proposed parish/school improvements (see below statistics), which could be incorporated into a possible Case Statement for a capital campaign. In their opinion, Planning Study respondents were asked to rate these specific elements as either:

*Positive: I/We believe the proposed improvement(s) are necessary.*

*Negative: I/We believe the proposed improvement(s) are unnecessary.*

*Unsure: I/We cannot comment regarding the proposed improvement(s).*

The percentages listed below indicate a consensus rating among the respondents in regard to each individual proposed parish/school improvement as identified by Our Lady of Grace Catholic Church officials.

<b>a. Converting the present Convent into a Parish Center?</b>			
	<u>Positive</u>	<u>Negative</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	<b>90.2%</b>	0.0%	9.8%
<i>Direct Mail/In Pew Respondents:</i>	<b>64.6%</b>	4.8%	30.6 %

**Comments Received:** (in no particular order)

*We need a place for the nuns!*

*Where will the nuns live?*

*Is it worth re-doing, or better to rebuild?*

*But what happens to the nuns?*

<b>b. Adding science and music/art rooms, and making other improvements to the school?</b>			
	<u>Positive</u>	<u>Negative</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	<b>85.4%</b>	1.2%	13.4%
<i>Direct Mail/In Pew Respondents:</i>	<b>86.4%</b>	2.0 %	11.6%

**Comments Received:** (in no particular order)

*I think the school families should be assessed for this.*

*I don't think new rooms for science and music/art are necessary.*

*Maybe there should be a separate fund or campaign for the school.*

*Not certain the school needs to build more classrooms, however.*

*How many students are there? How much is the tuition?*

*Not all parish children attend, nor can their families afford the tuition.*

*I think the families who have children in the school should fund this.*

*Shouldn't the school parents be responsible for the school?*

<b>c. Remodeling the kitchen in the Parish Hall?</b>			
	<u>Positive</u>	<u>Negative</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	<b>84.1%</b>	2.5%	13.4%
<i>Direct Mail/In Pew Respondents:</i>	<b>76.9%</b>	2.7%	20.4%

**Comments Received:** (in no particular order)

*The Parish Hall as a whole needs to be improved, not just the kitchen.*

*I'd like to see us remodel the entire Parish Hall.*

*I'd make it into a place that can be rented out when not being used by the parish.*

*Only if we start renting out the Hall to make money!*

*It serves its purpose. If you start renting out the Hall, then I would reconsider.*

<b>d. Expanding and improving restrooms in the church?</b>			
	<u>Positive</u>	<u>Negative</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	<b>90.2%</b>	2.5%	7.3%
<i>Direct Mail/In Pew Respondents:</i>	<b>78.2%</b>	8.9%	12.9%

**Comments Received:** (in no particular order)

*I think we need to improve the restrooms behind the church and Parish Hall only.*

*Restroom access needs to be inside the church, not outside.*

*This is needed the most.*

*The tiny restrooms will not accommodate wheel chairs or walkers.*

*Improving the restrooms, yes. Expanding them ... ?*

*Restrooms must be outside of the church.*

<b>e. Improving accessibility for the physically disabled around the church and school?</b>			
	<u>Positive</u>	<u>Negative</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	<b>78.0%</b>	4.9%	17.1%
<i>Direct Mail/In Pew Respondents:</i>	<b>81.6%</b>	4.1%	14.3%

**Comments Received:** (in no particular order)

*Do we really have a problem with this?*

*I think the plans are overdone as far as this item is concerned.*

*I don't feel this is a big issue here.*

*I don't see this as a major issue.*

*This would be very expensive. Is it really necessary?*

*America treats everybody like disabled!*

*A must!*

<b>f. Our overall Master Plan?</b>	<u>Positive</u>	<u>Negative</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	<b>85.4%</b>	0.0%	14.6%
<i>Direct Mail/In Pew Respondents:</i>	<b>72.1%</b>	2.7%	25.2%

**Comments Received:** (in no particular order)

*All of these improvements are important.*

*Parish Hall renovations should be part of the Master Plan, because this is our gathering place and it needs to be improved and updated.*

*I think the costs of this Master Plan may exceed our means in this parish.*

*I'm not sure that we need to improve all of these things.*

*I don't think a lot of this is necessary.*

*Too much concern is on bathrooms and not enough on staff improvements.*

*Wouldn't it be more cost effective to tear down the Convent and build a Parish Center that could be rented out?*

*Why so much talk about toilet facilities?*

*Do we have many handicapped students and parishioners?*

*How will we be able to do all of this?*

**6. Are there other projects you feel should be addressed?**

*Comments Received: (in no particular order)*

*The rectory needs improvement.*

*Upgrading the electrical and plumbing systems in both the parish and school.*

*Creating more storage areas.*

*There needs to be better sewer/drainage in the schoolyard.*

*I would like to see a fountain, rather than a bush, on the patio.*

*Perhaps more seating space for handicapped people in the church?*

*Possibly an elevator in the choir loft to help our seniors get up and down from there?*

*How about a Parish History & Archives Room?*

*Location and accessibility of the new church restrooms needs serious consideration.*

*Retain the Chapel in the Convent for daily Mass.*

*Cover the patio behind the church. Add a Bride's Room, too.*

*The wall behind the altar needs to be lighter and simplified.*

*Fix the church air conditioning system and improve security in the Sacristy.*

*I'd like to see us convert the Convent Chapel into an Adoration Chapel.*

*Possibly make perpetual adoration a goal for the parish?*

*The windows and electrical system in both the parish and school need to be updated.*

*Parish Hall renovation and expansion, so it can be rented out.*

*Parish Hall renovation and/or improvements.*

*Replace the portable Day Care Center facility with a permanent, hard structure.*

*We need more parking and we need more handicapped parking spaces!*

*Maybe we could think about putting a "stations of the cross" outside?*

*Maybe renovations to the Parish Hall and Day Care Center?*

*Couldn't we move the ministry parking to the current lawn area in front of the Convent?*

*We need more parking around here.*

*We should consolidate areas in the Parish Hall to create more storage space.*

*Improve the sound system in the church.*

*Maybe the altar could be repositioned nearer to the congregation.*

*Installing devices in the pews for those who are hearing impaired.*

*Take down the walls outside the Convent and create more parking and better security.*

*The Parish Hall needs to be renovated and rented out.*

*Maybe we could improve or replace the wooden patio/refreshment table?*

*Could we make a grassy area for our school children to play on in front of the Convent?*

*Additional parking is sorely needed.*

*We should use the playground area for additional parking during weekend masses.*

*I'd consider getting rid of the baptismal font.*

*I think the Master Plan covers all our present needs.*

*I'd like the parish to petition for a "green arrow" left turn at White Oak & Ventura.*

*Upgrading the church's computer network.*

*Making a room that's suitable for babies and small children.*

*I'd like to see the organ repositioned so the organist's back isn't facing the altar.*

*Updating the Parish Hall and the sound system.*

*We would like to see the Parish Hall renovated so it could become a source of income.*

*I'd like to see name tags for parishioners to wear on Sunday, not just the ushers.*

*The heating and air conditioning system needs to be upgraded.*

*Possibly a parking structure could be built?*

*Air conditioning system in parish needs to be upgraded.*

*Perhaps a facility where we can hold wedding receptions and other social activities?*

*The emphasis should be on improving our school facilities as*  
*it's considered one of the weaker parish schools in the west valley.*

*There are churches that have an array of different programs for seniors. We have none!*

*The pews need hardware maintenance.*

*The school staff must be addressed. We lose 30% of our 5th grade class every year.*

*Our junior high is considered well below average.*

*We could use a grassy field and a gym for the school.*

*Due to the cost of these projects, couldn't we conduct a campaign over 5-10 years?*

*Front of Convent should be made into more parking spaces.*

*Some brass railings for Eucharistic Ministers to hold onto going down steps from altar.*

*Noise from the kneelers needs to be silenced.*

*Does every bathroom need to be handicapped accessible?*

*Possibly using the grass area in front of the Convent for additional parking.*

*More activities for our teens. Maybe we also should bring back Oktoberfest?*

*A garden on the church grounds for the children to grow flowers and vegetables.*

*Redesign and enlarge the Parish Hall and add a better air conditioning system.*

*Put candles back in the church.*

*Update restrooms and maintain cleanliness of kitchen and restrooms.*

*The patio gathering area after Masses needs to be improved.*

*We need some more fundraisers – trips, pot lucks, etc.*

*The front office in the school needs to be enlarged.*

*Larger office space for the principal and other staff/teachers.*

*The sound system in the church needs to be improved.*

*More activities for our teens.*

*Maybe a gift shop?*

*Fix the drainage system in the school yard – it floods when it rains.*

*Keep the 6th, 7th and 8th grades in one building.*

*Have all parishioners bring food on Sundays to give to low income and poor people.*

*Very few programs for our youth.*

*Renovate the Parish Hall and rent it out to make the parish money.*

*Have adult basketball leagues and other sports that adults can participate in.*

*We need to improve the quality of the school before we improve the “packaging,” as I think it’s dishonest to do it the other way around.*

*I would like to see a pre-school for 3-5 year olds.*

**7. Do you feel that a majority of parishioners will volunteer their time, talent and treasure in support of a capital campaign?**

	<u>Yes</u>	<u>No</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	28.0%	17.1%	<b>54.9%</b>
<i>Direct Mail/In Pew Respondents:</i>	<b>45.6%</b>	12.1%	42.3%

**8. Would you be willing to volunteer your time for the campaign?**

	<u>Yes</u>	<u>No</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	<b>47.6%</b>	18.3%	34.1%
<i>Direct Mail/In Pew Respondents:</i>	39.5%	19.0%	<b>41.5%</b>

**9. Would you be willing to host a campaign event for parishioners in your home or at the parish?**

	<u>Yes</u>	<u>No</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	30.5%	<b>47.6%</b>	21.9%
<i>Direct Mail/In Pew Respondents:</i>	<i>(Not asked of these respondents)</i>		

**10. If asked, would you be willing to donate your talents by taking a leadership position on the Campaign Committee to be formed in order to facilitate the campaign?**

	<u>Yes</u>	<u>No</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	22.0%	<b>51.2%</b>	26.8%
<i>Direct Mail/In Pew Respondents:</i>	<i>(Not asked of these respondents)</i>		

**11. Who among our parishioners would be good leaders of a capital campaign?**

*To respect the confidentiality of this Study the Names Of “Good Leaders”*

*Received From Parishioners are not publish.*

12. In order to be successful in raising the funds necessary to make the necessary renovations and improvements, Leadership Gifts are important. The Leadership Gift Phase of a capital campaign would seek pledges of \$25,000, \$50,000, \$100,000 or more over a 3-year period from parishioners, foundations and possibly corporations. In your opinion, are there individuals/businesses in the parish capable of giving at these levels?

	<u>Yes</u>	<u>No</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	30.5%	1.2%	<b>68.3%</b>
<i>Direct Mail/In Pew Respondents:</i>	<i>(Not asked of these respondents)</i>		

13. Could you assist in identifying those families, businesses, organizations or foundations that could give at the following levels:

\$25,000-\$100,000:

Over \$100,000:

*NOTE: A confidential list of potential Leadership Gift prospects identified by Planning Study respondents can be found in Addendum B included with this report.*

14. While we are not currently soliciting contributions to the campaign at this stage of the process, determining the financial potential of the parish community is an important component of the study. Once the project details are solidified and the campaign formally begins, could your family consider a “Leadership” level pledge of \$25,000 or more, payable over a 3-year period?

	<u>Yes</u>	<u>No</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	4.9%	<b>84.1%</b>	11.0%
<i>Direct Mail/In Pew Respondents:</i>	1.4%	<b>88.4%</b>	10.2%

**15. What would you estimate your family contribution to be over a 3-year period?**

***Personal Interview Respondents:***

*Average gift was approximately \$187/month, or \$7,500 total for 3 years*

***Direct Mail/In Pew Respondents:***

*Average gift was approximately \$55/month, or \$2,200 total for 3 years*

***Summary Regarding Possible Campaign Giving Trends:***

*During this Planning Study, the average gift among Personal Interview respondents who felt comfortable declaring their financial intention was approximately \$7,500, or \$187.50 per month for 3 years (36 months) with a 10% down payment toward their pledge; and the average gift among Direct Mail/In Pew respondents that declared their financial intention was \$2,200, or \$55 per month for 3 years (36 months) with a 10% down payment toward their pledge.*

*The overall average gift among respondents from both groups was \$4,515 – based on a total of \$605,000 in total 3-year gifts indicated by 134 of the 236 total Planning Study respondents. 102 respondents would not declare their financial intention toward the proposed capital campaign.*

**16. In addition to regular gifts to the weekend offertory collection and the Together In Mission appeal to the Archdiocese, is it reasonable to assume that 30% of the parish (700 households) or more could contribute to a capital campaign at Our Lady of Grace?**

	<u>Yes</u>	<u>No</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	<b>61.0%</b>	1.2%	37.8%
<i>Direct Mail/In Pew Respondents:</i>	31.3%	27.2%	<b>41.5%</b>

***Comments Received: (in no particular order)***

*I believe 20% participation would be more realistic.*

*We're not sure everyone will support it!*

*We doubt if they would based on less than 18% that give to Together In Mission.*

*I think the parish would be very lucky to get 30% to contribute.*

*We have a hard time collecting the \$500 fee from school parents each year.*

*I would certainly hope so.*

**17. Is it reasonable to ask the “average parishioner” of Our Lady of Grace to consider pledging \$100 or more per month, payable over 36 months?**

	<u>Yes</u>	<u>No</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	29.3%	21.8%	<b>48.9%</b>
<i>Direct Mail/In Pew Respondents:</i>	18.7%	40.1%	<b>41.2%</b>

**Comments Received:** (in no particular order)

*\$70 a month may be more realistic.*

*For most, \$25 a month is more realistic to me.*

*My experience with the Fair is it's like pulling teeth to get people to be sponsors.*

*I don't think \$100 a month is unreasonable, but I don't have children.*

*\$50 a month is more reasonable.*

*A majority wouldn't consider giving anything close to that in weekly offerings.*

*We presume parishioners will give what they can.*

*\$40 a month is more realistic.*

*From the collections, we don't see this level of giving.*

*I think most could, but would they?*

*Many parishioners do not have that capability.*

*36 months is a long time for a family to pay on a pledge.*

*It's not an unreasonable request, but I think it will be hard to get.*

*Our parishioners, in general, are middle-class working families.*

*It's not reasonable for me!*

*Perhaps \$80 a month.*

*I couldn't pledge \$100 a month — that's \$3,600!*

*Not everyone could give this amount.*

*We could not afford \$100 monthly in addition to our weekly offerings.*

**18. Is there anything in the local or parish community that you believe would hinder the success of the proposed project?**

	<u>Yes</u>	<u>No</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	24.4%	<b>44.0%</b>	31.6%
<i>Direct Mail/In Pew Respondents:</i>	23.1%	33.3%	<b>43.6%</b>

**Comments Received:** (in no particular order)

*Our parishioners will need to feel strongly about this project.*

*There's a lack of definitive architectural plans.*

*Environmental issues, such as noise during construction angering the neighbors.*

*I'm concerned about the changing demographics in our parish.*

*OLG's weekly offertory contributions have been declining.*

*I'm not sure about people's ability to contribute.*

*We have 3 parishes that are relatively close to each other.*

*The sexual abuse cases where the Church has to pay for legal issues.*

*The "Together In Mission" appeal may hinder the success of the campaign.*

*Demographically speaking, our parish isn't as "rich" as it used to be.*

*There are many more lower income families now.*

*We have too many inactive parishioners.*

*Many may pledge, but not fulfill their commitment.*

*Neighbors living near the school might complain of noise, debris and traffic.*

*In a word, "apathy." Only a small number of parishioners get actively involved.*

*Many people in this area lost a lot of their landscaping during the recent freeze.*

*People are concerned about a rise in grocery costs.*

*The pedophile priests situation.*

*We will need to show our parishioners that we're making progress.*

*Just a general lack of support.*

*The large numbers of apartment dwellers who change addresses frequently.*

*Many older parishioners may no longer be able to donate as in the past.*

*Low income, foreign born immigrants in parish may not contribute much.*

*People are getting fed up with the Diocese and the priest abuse scandals.  
Possibly our Archdiocese' clergy abuse situation.  
Collecting enough funds from within our parish and school community.  
Getting everyone to give!  
People may not be able to give the money needed to do all this.  
It would be very hard for a middle-class or low income family to contribute.  
The same 30% who regularly give cannot carry the burden.  
I believe \$100 a month is an unrealistic financial expectation for parishioners.  
People, like me, cannot afford to give any more than we are already giving.  
Families in the school must feel they will keep their kids here for 10 years,  
otherwise they will not make a large donation.  
Maybe our parishioners can't afford the \$100 per month for three years?  
I'm assuming that we don't have enough parishioners to contribute to this cause.  
Older parishioners on fixed incomes will not be able to contribute.  
Younger families with children may find it difficult to make a pledge.  
The molestation lawsuits of the Universal Catholic Church.  
Your expectation of \$100 a month is way too high.  
A decreasing number of active parishioners.  
Raising enough money.  
If people care about our parish community, then they'll support it.  
Income level of many parishioners and their willingness to donate time.  
Rising costs in basic living needs has strapped many families.  
The quality of school academic program has slipped.  
There are issues with some teachers. The legal problems of our Archdiocese.  
A lack of good community spirit in the parish community.  
Uninformed parishioners who will not contribute.  
We'll need nice drawings/renderings of these improvements to get people excited.  
The total cost.  
The school needs to have an established reputation for academic excellence.  
Many are angry with the way the Church has handled the abuse issue.  
The current economic climate.*

*Not all of us live in the “hills,” nor do we have incomes that can handle this.*  
*It's a fact that only 20% of our parishioners are weekly/monthly contributors.*  
*A perception that what is raised will go to the Archdiocese for the sex scandals.*  
*Are the finances available in the parish?*  
*There are too many parishioners that do not contribute adequately each week.*  
*A reluctance to change what many parishioners believe is a beautiful church.*  
*Are these changes worth the expense?*  
*Traffic congestion around the church during construction.*  
*Many families have other financial obligations, not just giving to the church.*  
*Not enough parishioners able or willing to contribute.*  
*A great percentage of the school parents are not happy with the school.*  
*Therefore, I don't think they'd be willing to make a commitment of this type.*  
*The overall state of our economy.*  
*Not enough families doing their fair share.*

**19. If the campaign proceeds as proposed this Spring, will you support our pastor, Fr. Austin, and his parish leadership to the best of your ability to help ensure that the campaign is successful?**

	<u>Yes</u>	<u>No</u>	<u>Unsure</u>
<i>Personal Interview Respondents:</i>	<b>96.3%</b>	0.0%	3.7%
<i>Direct Mail/In Pew Respondents:</i>	<b>85.0%</b>	0.7%	14.3%

**20. Are there any other topics or advice you would like to mention that have not been addressed during this interview?**

*Comments Received: (in no particular order)*

*Living quarters in the rectory could use some updating.*

*Showing parishioners visuals, such as renderings or drawings from an architect.*

*If funds are not raised can the project be reduced or phased?*

*What will be the duration of this project and how will it affect church activities?*

*Some won't be able to afford \$100 a month. But I think it's possible for most.*

*I think it is financially excessive to think we can proceed with the entire project.*

*It should be done in phases.*

*I believe everything has been covered in this questionnaire.*

*I strongly believe we should tell the congregation to envision this project as a reality, and let God and the Universe manifest it to become a reality.*

*I think we've gone way overboard on the bathroom issue.*

*I think the middle school kids need to be separate from the elementary kids.*

*The school should require families to be "active, giving" members of the church before that family's child is considered for admission.*

*Possibly there are parishioners who have "talents" in the construction area that might offer in-kind gifts to defray the overall costs?*

*How many registered parishioners are there?*

*Will parishioners who occasionally participate in parish activities be solicited?*

*Maybe we could have a Spring Fair to raise some extra money?*

*I do not believe any additional rooms should be built for the school, as the enrollment is not increasing.*

*If we launch a campaign, it would be wise to invite Bishop Jerry to comment at campaign events.*

*It's important that our parishioners know that all the money raised is for our parish improvements and nothing else.*

*I think we need to get more young and middle-aged families involved in the campaign.*

*The future growth of the parish depends on their support.*

*Maybe we could sell commemorative tiles with family names imprinted for a wall or walkway?*

*Possibly we could have other fundraising activities such as dances?*

*Maybe the choir can cut and sell a CD?*

*Will the Bishop make any funds available from the Archdiocese?*

*There are 200 families in the school. All are Catholics and should be registered in the parish. And most of these families are excited about the campaign.*

*You may want to check with St. Monica's in Santa Monica. For an aging parish, they are doing very well in an apartment environment.*

*If enough money is not raised, what project(s) has top priority?*

*Are there other capital campaigns in our area that could compete against ours?*

*Maybe we should consider a longer payment period, such as 10 years?*

*During the construction, where will church services be held?*

*Will there be enough parking during construction?*

*Is there a completion bond that will be in effect to insure that the project is not drawn out over three years?*

*This idea is great!*

*In my opinion, the school project is far too ambitious and should be reconsidered.*

*I like Father Austin, but the parishioners are asking too much from the priest.*

*This is terrible timing. I have no confidence that funds won't be used to pay for the grave mistakes of the Church.*

*Despite this project, we need more programs for people of all ages.*

*Get rid of the sand in the small play area.*

*Have bingo nights, a lottery, or a golf tournament to raise the funds.*

*It does no good to build new classrooms if the same “outdated” teachers are going to teach the classes.*

*Why is the parish "jazzing up" Mass? Mass is not for our entertainment.*

*Please return to solemnity and old hymns.*

*Why is there a need to hire a group to plan how this is to be done?*

*Couldn't this money be used better?*

*Instead of having to add music/art and science rooms, what about transferring the 6th, 7th and 8th grade classes over to the Convent?*

*The case statement sounds terrific — and it's been very well thought out.*

*Are donations available from area businesses?*

*Maybe our retired seniors will help out to cut the expense of running a campaign?*

*Will the DRE's Office have adequate administrative support (copy machine, office supplies, etc.) when the Ministry Office is no longer next door?*

*Maybe we should eliminate areas not used effectively, such as the reading lab, and enlarge that area for staff?*

*Good luck!*

*There's room for improvement at the school in areas other than the facilities.*

*Are they going to consider having day care for children ages 6 mos. - 2.5 years, or until they are old enough to enter pre-kindergarten?*

*Make clear to our entire parish community that we're doing this for EVERYONE!*

*Improvements should be prioritized and completed one at a time, as funds allow.*

*I don't know if I could pledge \$100 a month?*

*Add desirable fundraisers at school/parish. PTO's efforts have become stale.*

*Adding a pre-school would be very good for keeping young parents in the church.*

*You may want to consider moving the handicapped section, as it gets cold.*

*Thank you for the opportunity to share my opinions.*

*We think you may be overly optimistic regarding contributors.*

*Assure people that prayers for success are as important as contributions.*

*Maybe we could add a library for the adults in the parish and increase the number of Adoration of the Blessed Sacrament days?*

*This is all very exciting!*

*Maybe we should prioritize parts of the Master Plan?*

*Thank you for giving me the opportunity to "vote."*

## RECOMMENDATIONS & CONCERNS

Guidance In Giving, Inc., has now completed the Planning Study for a proposed capital campaign for Our Lady of Grace Catholic Church. It is the firm's recommendation that the parish move forward and inaugurate a capital fundraising campaign drive to begin addressing its growing physical plant needs and constraints.

The findings of the Planning Study revealed that, in general, parishioners and parish families at Our Lady of Grace Catholic Church believe the parish's capital needs and its Master Building Plan are important; and they indicated, in general, that they would support the Master Building Plan to the best of their financial ability.

Furthermore, the findings of the Planning Study revealed that Our Lady of Grace Catholic Church can realistically raise between \$2,500,000 and \$3,000,000 in a capital campaign to improve the facilities at both the parish and school. Guidance In Giving, Inc., believes that a public or "challenge" goal could be set at \$3,500,000 for a capital campaign at Our Lady of Grace Catholic Church. But to attain this goal, the parish will need to seek Leadership/Major Gifts and receive a minimum of 25-30% participation (approximately 600-800 pledge commitments) among its 2,800 registered parishioners.

It is to be noted that, for a parish the size (number of "active" registered parish households) of Our Lady of Grace Catholic Church, together with an analysis of the parish's annual offertory and Together In Mission giving records, a campaign goal of \$2,500,000 to \$3,000,000 would be challenging and ambitious, yet realistic in attaining.

In determining this realistic monetary goal, Guidance In Giving, Inc., arrived at the \$2,500,000 to \$3,000,000 figure using the statistical results achieved in this Planning Study, coupled with the firm's experience and knowledge that a typical parish capital campaign goal should roughly be based on an amount that is approximately 4-5 times the

parish's current annual offertory. Our Lady of Grace Catholic Church's annual offertory is currently in the \$700,000 to \$750,000 range.

There are several factors, however, that could adversely affect Our Lady of Grace Catholic Church's ability to capitalize on its fundraising potential.

First, it was puzzling to the firm that few members of the parish (236 of 2,800 registered parish households) took time to participate in the Planning Study conducted during the past six weeks. This represents less than 10% total participation among parish households, and occurred despite an invitation letter to participate in either the Personal Interview component of the Planning Study, or by completing the Direct Mail Survey Questionnaire.

All registered parishioners were mailed, respectively, a letter from Father Doran, a proposed Case Statement for the project, and a copy of the appropriate Survey Questionnaire. Households that received a request to participate in the Personal Interview component also received a subsequent follow-up phone call made by Parish Staff members and others.

Second, a majority of parishioners that did take the time to be interviewed, or returned a completed survey questionnaire, are concerned, in general, about the following issues:

- Recently reported declines in the parish's weekly collection.
- Parish's struggle to reach its "Together In Mission" goal each year.
- Changing demographics in the greater Encino area indicating less "affluency."
- The ongoing Catholic Church scandal — will money pledged be used for this?

Based on the methods used in this Planning Study coupled with the results achieved, Guidance In Giving, Inc., strongly believes that parishioners at Our Lady of Grace

Catholic Church will consider making a financial commitment to a campaign where the funds raised are clearly earmarked for making church and school improvements.

The firm further believes that parish donors will make a pledge to the best of their ability over a 3-year period, if they agree with the final campaign case statement. The firm suggests a 3-year “minimum challenge pledge” per parish household be set at \$4,000 – or \$100 a month, including an initial down payment of 10% (\$400) leaving a balance of \$3,600 payable over 36 months.

In regards to Leadership/Major Gift prospects, one survey question asked respondents if they could identify individuals, families, corporations, foundations and/or businesses who may be able to make gifts of \$25,000 or more to this campaign over the 3-year/36-month period, and several respondents were able to identify one or more potential prospects; however, the majority of people surveyed were not sure if these families, etc., existed at Our Lady of Grace Catholic Church.

As a possible way to stimulate giving at the Leadership/Major Gift levels of \$25,000 or more, Guidance In Giving, Inc. recommends incorporating appropriate “naming” or “memorial” opportunities into the campaign, and to begin the Leadership/Major Gift “ask” at \$25,000. The firm’s decision is based on the fact that renovation of the Convent into a Parish Center and the construction of new classrooms at the school should provide numerous naming/memorial opportunities. These opportunities offer parishioners a chance to affix their name (or the name of a loved one living or deceased) in the “history” of this evolving parish.

Finally, since this is the first capital campaign at Our Lady of Grace Catholic Church in numerous years, the firm emphatically believes that the campaign must be successful. A successful campaign will set the stage for other capital endeavors the parish may need to embrace in future years.

All parishioners and everyone associated with Our Lady of Grace Catholic Church must have a level of confidence knowing that they have an opportunity to be successful in such an ambitious endeavor. A successful capital fundraising campaign conducted by the parish will do much to affirm that level of confidence.

### **SUMMARY**

This completes the Planning Study conducted by Guidance In Giving, Inc. for Our Lady of Grace Catholic Church.

Guidance In Giving, Inc. hopes that the recommendations brought forth in this study will be helpful in charting a course of direction for a successful capital fundraising campaign. The findings presented represent the opinions expressed by 82 parishioners who participated in the Personal Interview process, and 154 others who completed and returned the direct mail survey or in pew questionnaire. With this study now complete, the firm is confident that we have “told the story” of Our Lady of Grace Catholic Church.

Guidance In Giving, Inc. also believes there is substantial evidence that supports a capital fundraising initiative at Our Lady of Grace Catholic Church. Successfully achieving this potential will require an extraordinary effort on the part of all parishioners, groups and organizations associated with the parish. This includes a willingness to become involved in the campaign, an optimistic outlook and atmosphere in conducting the campaign drive, and a generous response from all parishioners and parish families.

The firm considers it a privilege to have conducted this Planning Study for Our Lady of Grace Catholic Church, and we’d like to thank Father Doran and parish officials for giving us an opportunity to be of assistance. Our firm’s representative, Mr. Kevin B. Engler, found study respondents to be most receptive to the questions and inquiries, candid in their responses, and interested in providing meaningful commentary, advice and direction for the parish.

It has been a pleasure for our firm to have had the opportunity to work with such committed people, and we stand ready to provide further assistance by implementing our recommendations within the framework of a successfully proven plan of action. Thank you, again, for giving Guidance In Giving, Inc., an opportunity to assist in this most worthwhile endeavor in the life of Our Lady of Grace Catholic Church.