



PLANNING STUDY EXECUTIVE REPORT

Prepared for St. Mary Catholic Parish
Littleton, Colorado

September 7, 2017



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Planning Study Overview

St. Mary Catholic Parish retained the services of the Steier Group to conduct a planning study for a potential capital campaign. The planning study is a development tool used to determine how much money an organization may raise for a specific purpose. It is the starting point for an organization looking to answer the following questions:

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

The planning study involves a review of St. Mary's current needs as identified by parish leadership. The process of conducting personal, face-to-face interviews with St. Mary's top donors and gathering feedback from other key individuals allows the Steier Group to gain a clear understanding as to whether conducting a campaign will provide the financial support for the proposed projects. Should the total cost of the proposed projects prove too large for a single fundraising campaign, the planning study can provide guidance that will help leaders to prioritize the campaign goals.

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

The Steier Group planning study team:

- Shannon McClure, Campaign Manager
- Rich Roberts, Executive Vice President of Client Services
- Jim Steier, Chief Executive Officer
- Roger Buddenberg, Foundation Researcher
- Becky Ludemann, Graphic Designer
- Natalie Ruch, Executive Services Administrator

Findings and Recommendations



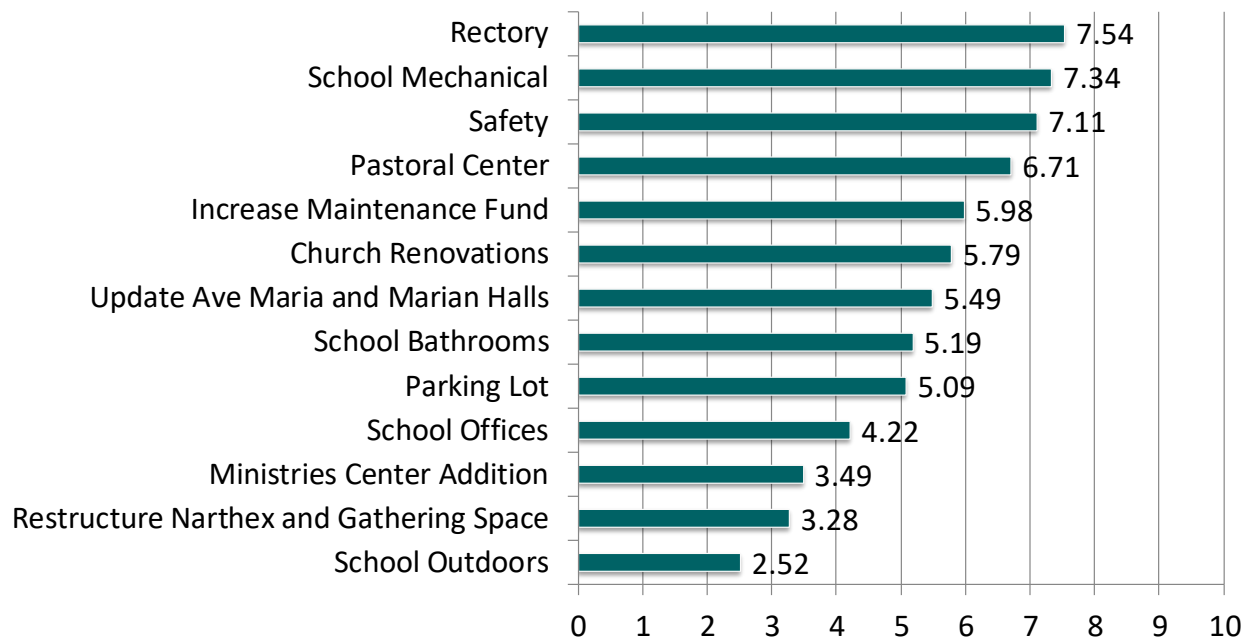
Planning Study Findings

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

- 62 personal interviews with St. Mary's leaders and potential top donors.
- 390 mail and online survey responses collected from St. Mary's current parishioners.
- A review of St. Mary's previous capital campaign as well as other ongoing development efforts.
- The Steier Group's professional experience conducting planning studies and capital campaigns for Catholic parishes across the country.

Based on the information gathered from the sources above, the Steier Group presents the following observations and recommendations to St. Mary as it considers moving forward with a capital campaign.

Participants prioritized the potential campaign goals as follows:



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

- 79% of respondents are at least familiar with the proposed projects.
- 67% of respondents are personally in favor of a capital campaign.
 - 92% of personal interview participants are in favor.
 - 63% of mail/online respondents are in favor.
- 71% of respondents indicated that they will make a personal gift to the campaign.
 - 86% of personal interview participants will make a gift.
 - 68% of mail/online respondents will make a gift.
- 47 respondents indicated they would serve on the campaign team and assist with requests for gifts.
- 47 respondents indicated St. Mary is included in their estate.
 - 38 respondents indicated they are interested in learning more about how they could make a planned gift to St. Mary.

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

- The Disciples of the Hearts of Jesus and Mary (DCJM) is beloved by its parish. Positive traits mentioned include the order's spirituality, humility, generosity, and its focus on the family. Many see the 10-year continuous leadership of the parish as its most valuable asset. Participants noted how selfless the DCJM members are in giving of themselves to the people of the church.
- Many in the personal interviews noted that the traditional/orthodox Catholic tradition supported by the DCJM was part of what they loved best about the parish. Emphasis on the Eucharist and the sacrament of Reconciliation is particularly strong.
- There are two camps within the parish – one with an overall feel of fiscal conservatism and a “don't fix it if it isn't broken” attitude; the other is less fiscally conservative and more visionary. This group favors removing the choir loft and the beautification in the church.
- The choir loft removal is a divisive topic. Those in favor of relocation note that it is a distraction from the Eucharist and express the desire to comply with archdiocesan guidelines. Those who disagree say it is not a distraction and/or the cost of removing it is too high relative to the benefit.
- Many of the maintenance-related projects tested high and are well-supported. The maintenance reserve tested well but there are questions regarding the amount needed to maintain a campus of this size and age. Personal interviewees were generally in favor of increasing the reserve but unsure if \$500,000 is the right amount.

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

Self-Reported Gift Level	Total Number of Potential Donors
\$0	65
\$1 - \$99	8
\$100 - \$499	20
\$500 - \$999	23
\$1,000 - \$2,499	90
\$2,500 - \$4,999	97
\$5,000 - \$9,999	29
\$10,000 - \$14,999	8
\$15,000 - \$19,999	10
\$20,000 - \$24,999	1
\$30,000 - \$49,999	3
\$50,000 - \$74,999	2
\$75,000 - \$99,999	1
No Response/Unsure	95
Total Responses	452
Total Self-Reported Gift Range	\$1,130,301 - \$1,273,501



Fundraising Potential and Key Recommendations

Fundraising Potential

Based upon the positive results of the planning study, the Steier Group recommends that St. Mary Catholic Parish begin preparing for a three-year capital campaign upon approval from the Archdiocese of Denver. Prior to starting the effort, the Steier Group recommends a one-month public relations phase to address concerns shared in the study specifically in regards to the church renovation plans.

The Steier Group projects that St. Mary Catholic Parish will raise \$3.5 million-\$5 million in a capital campaign by using the Steier Group's recommended approach. The Steier Group's recommended approach includes the Key Recommendations below and on the following pages.

Key Recommendations

The planning study for St. Mary Catholic Parish provided the Steier Group with insight into several key areas that will impact the success of a capital campaign. The Steier Group offers the following recommendations based on the information gathered during the study. These recommendations aim to quantify areas deserving special attention in the coming weeks and months should St. Mary Catholic Parish move forward with a major fundraising effort.

Next Steps

- Use the next month to develop public relations strategy aimed at addressing concerns expressed by participants concerning the reconfiguration of the nave and sanctuary. Pay close attention to the plans for repositioning the choir loft. Explain the needs and benefits associated with the relocation and the thought process behind the decision.
- Work with the Steier Group to develop materials to support your case. This could include a series of frequently asked questions to alleviate concerns or a brochure with details and renderings.
- Work to secure approval from the Archdiocese of Denver to move forward with a campaign. Ensure the archdiocese includes St. Mary Catholic Parish on its October PFRC calendar. Prepare and finalize the necessary documents for that meeting.

Finalize Campaign Goals

- St. Mary Catholic Parish's leaders should use the preparation phase to finalize the campaign goals based on the parish's long range planning, responses in the planning study and the projected funding potential.

Finalize Campaign Goals (continued)

- Consider setting tiered goals to denote campaign success. Identify the dollar amount and the projects addressed when reaching a milestone. For example:
 - \$3.5 million *Celebration Goal*
 - \$4.5 million *Challenge Goal*
 - \$5 million *Victory Goal*
- St. Mary Catholic leadership should consider reducing the scope of the renovation projects to bring them in line with fundraising projections.
- If appropriate, meet with the parish architect, construction firm and trade union representatives to identify cost saving opportunities.

Recruit a Strong Campaign Leadership Team

- St. Mary Catholic Parish's leaders and the Steier Group should begin identifying and recruiting a strong, diverse volunteer team to work on the capital campaign. Solidify commitments from key individuals identified through the planning study.
- While a strong group of lay leaders is essential, Fr. Nieva must take an active role in securing volunteers and leading campaign initiatives.
- St. Mary Catholic Parish's leaders and the Steier Group should ensure the campaign team includes representatives from the parish council, finance committee, Knights of Columbus and other influential parish organizations such as St. Mary School and Home and School Association (HSA), St. Mary Parish Pantry, Altar and Rosary Guild and Galilee Young Adults.

Implement a Comprehensive Communications Plan

- During the preparation phase of the campaign, St. Mary Catholic Parish should share the planning study results and campaign plan through a letter to the entire parish community. Emphasize the positive results of the study and the plan to finalize the campaign goals based on the planning study responses and the parish's projected fundraising capacity.
- St. Mary Catholic Parish should work with the Steier Group to develop and share a consistent and complete campaign message. Clearly communicate the complete details for each capital project, the cost, need and benefit of each. Emphasize how these improvements will directly improve the parish's mission.
- St. Mary Catholic Parish should work with the Steier Group to design a comprehensive campaign communications plan to educate parishioners on the needs facing the parish. The plan may include:
 - Announcements
 - Bulletin: weekly inserts offering key campaign information.
 - Pulpit: parishioner or volunteer campaign testimonials delivered at the pulpit are an effective way to communicate progress and encourage participation.

Implement a Comprehensive Communications Plan (continued)

- Campaign Thermometers
 - Placed in a high-traffic area, campaign thermometers provide a prospective donor subtle encouragement while offering updates.
- Case Statement
 - The case statement clearly explains the campaign goals and projects. It explains why a prospective donor should consider supporting the cause. Mail the case statement, with a gift request letter, to everyone asked to support the campaign.
- E-Newsletters
 - Volunteer e-newsletters offering advice, encouragement and campaign progress help strengthen the line of communication between the campaign manager and the volunteer.
 - Parish e-newsletters provide weekly campaign progress.
- Frequently Asked Questions (FAQ)
 - This communication piece focuses on providing answers to common questions raised by study participants.
- Social Media
 - If applicable, use the parish Facebook page, Flocknote or Twitter accounts to encourage volunteer participation and donor involvement while offering campaign updates
- Website
 - Weekly campaign updates should be available starting with announcing the results of the study. Throughout the campaign post additional announcements such as the campaign theme, recruited leaders and key campaign events.
- Consider developing a personalized proposal for each potential lead gift donor that lays out the case for support and accounts for each prospect's preferred project(s) as shared during the planning study.
- Create comprehensive growth projections for St. Mary Catholic Parish. These projections allow leaders to share the long-range vision for the parish and demonstrate how this capital campaign will meet future needs.

Finalize Cultivation and Solicitation Strategy

- Consider scheduling meetings with the top five to 10 potential donors to share the results of the planning study and cultivate lead gifts to the campaign. The goal of these visits will be to strengthen the relationship with the donor, involve them in the planning process for the campaign, and cultivate lead gifts.
- Throughout the preparation and solicitation phases of the capital campaign, plan and host targeted donor cultivation events to share the broad vision for the parish. Take care to address the concerns shared during the planning study.
- Based upon the capacity of some parish prospects, implement a lead gift appeal strategy that involves securing the largest gifts early to challenge other parishioners to give at a higher level.

Finalize Cultivation and Solicitation Strategy (continued)

- Develop challenge gifts to motivate newly registered families, or those who have been financially inactive, to invest in the future of the parish. Challenge vehicles could include:
 - A dollar for dollar match up to a certain level
 - A participation challenge
 - A challenge matching all commitments made by new donors
- St. Mary Catholic Parish should allow for the designation of gifts to projects identified by donors, if applicable.
- Secure enough campaign volunteers so that the parish may approach the top 200 potential donors through personal visits.
- Secure enough volunteers so the parish may personally contact the next 430 prospective donors. Develop alternative strategies such as after-Mass appeals, multiple direct mail appeals and phone-a-thons to reach lower-level prospects.
- Develop naming opportunities designed to attract interest from major potential donors. Typical naming rights include buildings, rooms, etc. Discuss other forms of recognition, like donor walls, for lower-level givers. Establish the menu of opportunities before gift requests begin and include in all appeal materials.
- Promote every opportunity for in-kind gifts. Options include construction, painting, plumbing, concrete, etc. Work with contractors to arrive at a dollar value for all in-kind work and promote those gifts to the entire parish.

Promote Planned Giving

- Develop a strategy to promote planned giving. This program may include:
 - Personalized solicitation letters with a reply mechanism
 - Dedicated space in the bulletin to talk about planned gifts
 - Testimonials from those who have already made a planned gift to St. Mary Catholic Parish
 - Private receptions and seminars to educate supporters on the tax benefits of planned giving
- Promote planned giving vehicles, such as life insurance, to help certain donors maximize the gifts they can make to the parish during this capital campaign.
- Educate older donors on the opportunities available to leave an endowment gift to the parish.
- Consider forming a legacy society to honor those who have made planned gifts to St. Mary Catholic Parish. Cultivate all members of this group to ensure the parish remains part of their estate plan.



Proposed Campaign Timeline and Structure

The Steier Group recommends that St. Mary Catholic Parish implement a 30-week capital campaign structured as follows:

Public Relations Phase (Four Weeks)

Use this period to create a public relations strategy focused on the extensive church renovations plan. Create the necessary brochures and documents. Host information sessions and share detailed renderings. Address other concerns shared in the planning study.

Preparation Phase (Eight Weeks)

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

Silent Phase (Nine Weeks)

This section will involve securing gifts from the entire campaign volunteer team as well as lead and major gift prospects. Fr. Nieva, campaign leaders and the Steier Group will personally visit these prospects.

Public Phase (Seven Weeks)

After securing gifts from campaign leaders, St. Mary Catholic Parish will move into the “public phase” of the campaign. The campaign volunteer team and the Steier Group will request support from the remainder of the parish. The Steier Group will keep the parish up-to-date on the campaign progress throughout the entire effort.

Grant Writing (throughout the campaign)

The Steier Group researches and prioritizes foundations with input from parish leaders. The Steier Group will manage the process of contacting feasible foundation prospects, securing application guidelines, and submitting formal requests. The Steier Group will work to uncover any personal connections between foundation board members and campaign leaders or volunteers that may increase St. Mary Catholic Parish’s chances to secure funding for this campaign. This process will continue throughout the campaign. *See the Appendix for a list of foundations identified as possible funding sources for this capital campaign.*

Follow-Up Phase (Two Weeks)

After completing personal appeals, the Steier Group will coordinate campaign phone-a-thons to target unresponsive parishioners and non-parish school families. The Steier Group will also coordinate “Commitment Weekend” to provide parishioners with the opportunity to make a campaign commitment during Mass. Following Commitment Weekend, a final direct mail appeal will target remaining undecided households, providing them with a final opportunity to participate in the campaign.



Required Elements for a Successful Campaign

The Steier Group has identified specific elements required for St. Mary Catholic Parish to conduct a successful capital campaign and raise the \$3.5 million - \$5 million projected by the Steier Group.

Adhere to the Proven Methods of Successful Fundraising

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

Positive, Enthusiastic Leadership

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

Unwavering Commitment to the Campaign Timeline

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

Survey Questions and Responses



Question 1: What do you like best about St. Mary?

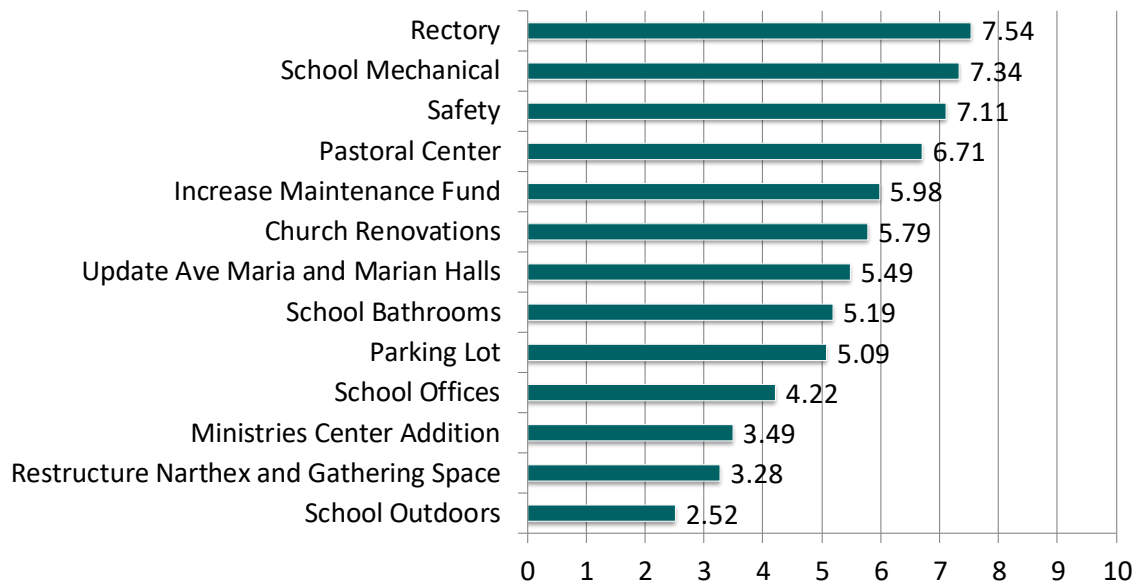
REPRESENTATIVE SAMPLE OF RESPONSES

- The DCJM priests are wonderful. They are humble, dedicated, loving, involved, sacrificial, with deep spirituality, sincere love of the Lord and passion for their vocation.
- St. Mary is a vibrant community. The church is my family. This community is giving and serving.
- The DCJM is family-focused.
- The location of the church is convenient.
- The school drew us close to St. Mary.
- I like that the DCJM are authentic, orthodox Catholics.
- Fr. Javier knows everyone's name/the priests connect with us individually.
- There's something about St. Mary that is comfortable.
- I like the frequency of services offered, multiple daily Mass times, daily Confession, Saturday devotions, etc.
- We like that there are a lot of young families here. We fit in here.
- I like our focus on confession.
- I like that there is stability in the priests assigned here, due to them being part of an order.
- St. Mary has a welcoming spirit.
- We like the youth program at St. Mary.
- We like that St. Mary is centered on the Eucharist.
- I like that the DCJM emphasizes individuals encountering Christ and building upon one's relationship with God.
- We like the Bethany ministry.
- I like that the DCJM priests are salvation-focused.
- We love the adoration chapel and our family spends a lot of time there.
- We like the large size of the parish.
- I like the diversity of ministries here.
- St. Mary feels like home to us.
- The sanctuary is prayerful. I like the stained glass.
- I like that we have a long history of being part of the community.

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

Question 2: How would you rate the following priorities?

Combined Total Responses



Personal Interview Responses

Project	Score
School Mechanical - replace boiler, add central air in junior high	8.97
Rectory – renovate and repair kitchen and bathrooms	8.47
Pastoral Center – replace windows, add central air and restrooms	8.03
Safety - replace church HVAC update facility to fully comply with ADA standards	7.81
Church Renovations - sanctuary repair and beautification, remove choir loft, add adoration chapel bathroom	7.64
Increase Maintenance Fund	7.64
Parking Lot - improve drainage, add covered walkway and lighting upgrades	6.93
Update Ave Maria and Marian Halls including a new kitchen	6.52
Ministry Center addition	6.33
School Offices – renovate or add-on to increase office space	5.74
School Bathrooms – expand and renovate main floor elementary bathrooms	5.60
Restructure narthex and gathering space	5.22
School Outdoors - landscape improvements, complete St. Mary's Park	3.23

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

Mail and Online Responses

Project	Score
Rectory – renovate and repair kitchen and bathrooms	7.39
School Mechanical - replace boiler, add central air in junior high	7.06
Safety - replace church HVAC update facility to fully comply with ADA standards	6.99
Pastoral Center – replace windows, add central air and restrooms	6.49
Increase Maintenance Fund	5.63
Church Renovations - sanctuary repair and beautification, remove choir loft, add adoration chapel bathroom	5.48
Update Ave Maria and Marian Halls including a new kitchen	5.32
School Bathrooms – expand and renovate main floor elementary bathrooms	5.12
Parking Lot - improve drainage, add covered walkway and lighting upgrades	4.78
School Offices – renovate or add-on to increase office space	3.97
Ministries Center Addition	3.02
Restructure narthex and gathering space	2.95
School Outdoors - landscape improvements, complete St. Mary's Park	2.40

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

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

REPRESENTATIVE SAMPLE OF RESPONSES

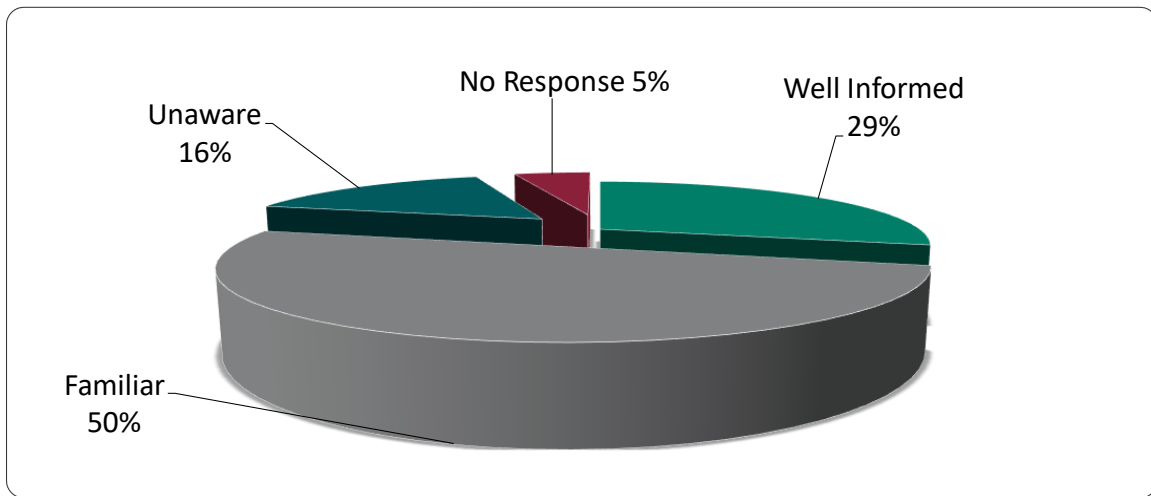
- We're not in favor of the removal of the choir loft because of the cost (it is too expensive relative to the benefit).
- Removing the choir loft is a number one priority. It is distracting during Mass.
- It is important to add a bathroom to the adoration chapel.
- If it is necessary to move the choir loft? Why were we not informed before we spent the money in the last remodel? Why did the archdiocese approve that? Did the regulations change since then?
- I would like to see a cry room added to the church. Another solution could be at least setting up chairs in the narthex for moms and kids.
- I don't know why a we need a bathroom in the adoration chapel. It will be distracting and is too expensive.
- It is necessary to address the parking lot flow. There is a bottleneck in front of the church. The direction for driving and parking are confusing. It's hard to use and the spots, while designed to pull through, aren't used that way.
- Please improve the church sound system. Make sure the acoustics are good for music.
- I'm worried that there is not support for the artwork. What does the artwork and beautification entail? We don't need beautification.
- I do not want to see a covered walkway added.
- The church kneelers need re-doing or replacement. They are a penance.

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

- The parking lot and outside stairs are dangerous, especially for the elderly.
- Most people can't see the altar from their seat. Screens and projectors would help. Make modern changes that will impact the parishioners here. Raise up the altar.
- The vent locations in the church create cold spots on the outsides of the pews.
- The Marian and Ave Maria Hall kitchen is important to the social life of the church. It is sorely lacking for the number of ministries that use it.
- The landscaping of the campus needs improving. In general, it is shabby. Professionals and not volunteers should maintain the grounds.
- The middle school bathrooms are too small, especially those in the basement. This was a number one recommendation from the parents' committee.
- It is necessary to renovate the school offices, but not include it as a building addition.
- I'd like better seating for the elderly and handicapped in the church, both in the front and the back.
- The acoustics in the church are awful. There are echoes. This makes it more difficult to clearly understand the message particularly when the speaker has an accent.
- The proposed maintenance fund is too big. It should be no larger than the amount needed for one year's maintenance.
- Volunteers should complete work on St. Mary's Park. Is there a ministry that could own this responsibility?
- The Joachim Hall cafeteria needs better sound proofing. The walls look awful. It's embarrassing.
- The school's bathrooms need to be better. Broken bathroom locks need fixing and the toilets are dirty and they smell. It's embarrassing when we host visitors.
- I'm glad to see that ADA upgrades considered. I propose that we include parishioners with disabilities when making specific choices.
- We should look at the number and location of handicap spots.
- We need handicap accessible doors.
- The narthex and gathering spaces are too noisy and distracting for those using the confessionals.
- Lighting in the narthex is too dim for older parishioners.
- The narthex and gathering space is fine. I have never been distracted during Confession there.
- Our large elderly population places great importance on ensuring accessibility and safety in the parking lot and church.
- The deacons need a kneeler to use during Mass.
- The key issues to address are plumbing, electricity, and maintenance repairs.
- Much of the ice issue could be relieved by choosing different locations when removing snow, depending on traffic and sloping of the parking lot.
- If the choir is moved, I'm concerned about losing church seating.
- Ice in the parking lot is an issue. I don't attend church if it's icy.
- Just because the priests don't complain about their rectory doesn't mean we shouldn't upgrade it.
- The Pastoral Center really needs its restroom situation addressed.
- We need more meeting rooms for groups between 40-60 people.
- The flow of Marian Hall, Ave Maria and the kitchen isn't efficient. Rethink the whole space.
- I'd like to see partitions in Marian Hall like there are in Ave Maria.
- We need to complete St. Mary's Park and include an irrigation plan, not hand-watering.
- Please don't get rid of the green space between the church and school. It's an asset.
- It is necessary to upgrade the Joachim Hall kitchen.
- Can we add bleachers in the gym? The PE teacher has been begging for this for years.
- I want to see more projects that benefit the school.

Question 3: How informed are you about the proposed plans?

Combined Total Responses



Personal Interview Responses

	Responses	Percentage of Total
Well Informed	25	40%
Familiar	23	37%
Unaware	11	18%
No Response	3	5%

Mail and Online Responses

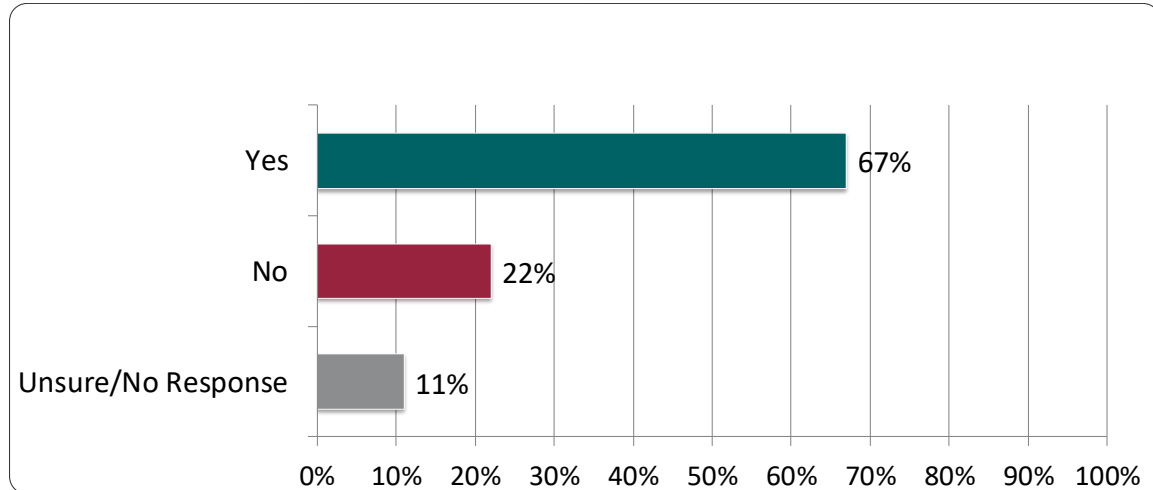
	Responses	Percentage of Total
Well Informed	106	27%
Familiar	205	53%
Unaware	62	16%
No Response	17	4%

REPRESENTATIVE SAMPLE OF RESPONSES

- I think the approach taken to have the town halls was a great opportunity for people to learn more and participate. It was inclusive.

Question 4: Are you personally in favor of a capital campaign to accomplish these goals?

Combined Total Responses



Personal Interview Responses

	Responses	Percentage of Total
Yes	57	92%
No	0	0%
Unsure	5	8%
No Response	0	0%

Mail and Online Responses

	Responses	Percentage of Total
Yes	246	63%
No	98	25%
Unsure	17	4%
No Response	29	8%

REPRESENTATIVE SAMPLE OF RESPONSES

- This campaign is necessary to sustain the church. It's the only way to pay for this.
- We are in favor of the campaign if only the projects we support are in the campaign and the cost is right.
- Safety and maintenance must come first. I am not in favor of renovating the church for aesthetic reasons. We should focus on addressing facility needs.
- The church looks fine. At the time, the archbishop approved everything.
- We need financial discipline when managing these projects. Don't go over budget.
- I don't support the choir loft project and am only in favor of a campaign if that does not happen. The choir loft above the altar is one of the best things about the interior of the church.
- The campaign goals are vague.
- I have no confidence in the present administrative staff.
- Whether I support this campaign will depend on seeing the study results. There needs to be more transparency about this decision.

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

RESPONSES

(To ensure the confidentiality of those who responded to this question, 28 names have been provided to the leadership at St. Mary.)

Question 6: If asked by St. Mary to serve as a member of the campaign team and assist with requests for gifts, would you accept?

Personal Interview Responses

	Responses	Percentage of Total
Yes	12	19%
No	32	52%
Unsure	7	11%
No Response	11	18%

Mail and Online Responses

	Responses	Percentage of Total
Yes	35	9%
No	115	29%
Unsure	0	0%
No Response	240	62%

Combined Total Responses

	Responses	Percentage of Total
Yes	47	10%
No	147	33%
Unsure	7	2%
No Response	251	55%

NAMES OF THOSE WHO RESPONDED FAVORABLY

(To ensure the confidentiality of those who responded to this question, 47 names have been provided to the leadership at St. Mary.)

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

Personal Interview Responses

	Responses
Phone-a-thon volunteer	12
Events committee member	15
Administrative support	25

Mail and Online Responses

	Responses
Phone-a-thon volunteer	49
Events committee member	68
Administrative support	140

Combined Total Responses

	Responses
Phone-a-thon volunteer	61
Events committee member	83
Administrative support	165

Question 7: What should the role of Fr. Javier Nieva be in a capital campaign?

RESPONSES

- Fr. Javier should be a good communicator of the importance of this campaign, its goals, and its impact. Transparency is important.
- Fr. Javier should be the decision maker and leader, but should leave the execution of this campaign to staff and volunteers.
- Fr. Javier should be the face of this campaign and be its primary advocate and cheerleader.
- I want Fr. Javier to be our prayerful leader.
- Fr. Javier needs to be asking families for money but not at the sacrifice of the rest of his responsibilities. People will give because of him.
- Fr. Javier should be a visible leader.
- Fr. Javier should head off groups that have different opinions about what should be done. He could act as a mediator.
- I'd like Fr. Javier to ensure that the funds raised for this campaign will be used for their intended purpose.
- Fr. Javier is good at public relations and has a great knowledge of individual parish families. Because of this, he would be a great motivator.
- I'd like to know what Fr. Javier wants so we can all support his vision for the church.
- I'd like Fr. Javier to communicate DCJM's relationship with the diocese and how long their tenure here will be. They make a lot of difference here.
- I'd like for Fr. Javier to acknowledge in his appeals to the parish that he understands the financial realities and obligations we all face.
- I'd like for Fr. Javier to be strong in his decisions and help the parish to understand them by using scripture to reinforce those decisions.
- I want Fr. Javier to seriously consider the impact this campaign could have on parishioners.
- I want Fr. Javier to be decisive and clearly communicate his vision.
- I'd like Fr. Javier to sit down with the staff and have some conversations about how spaces are used and what the real needs are.
- Communicate but please don't hound us from the pulpit.
- Keep the inclusive spirit of the town halls going.

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

Question 8: If applicable, would your company support a capital campaign for St. Mary with an outright gift or through a matching gift program?

Personal Interview Responses

	Responses	Percentage of Total
Yes	4	6%
No	11	18%
Not Applicable	10	16%
Unsure	3	5%
No Response	34	55%

NAMES OF THOSE WHO RESPONDED FAVORABLY

(To ensure the confidentiality of those who responded to this question, 4 names have been provided to the leadership at St. Mary.)

COMPANY NAMES GIVEN AS POSSIBLE DONORS

- *(To ensure the confidentiality of those who responded to this question, 7 names have been provided to the leadership at St. Mary.)*

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

Question 9: Who are the 5 to 6 families that you think would be most capable of making a lead gift to this campaign?

RESPONSES

- *(To ensure the confidentiality of those who responded to this question, 28 names have been provided to the leadership at St. Mary.)*

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

Question 10: Have you remembered St. Mary in your will or made some other type of planned gift?

Personal Interview Responses

	Responses	Percentage of Total
Yes	11	18%
No	45	72%
Unsure	0	0%
No Response	6	10%

Mail and Online Responses

	Responses	Percentage of Total
Yes	36	9%
No	323	83%
Unsure	1	0%
No Response	30	8%

Combined Total Responses

	Responses	Percentage of Total
Yes	47	10%
No	368	82%
Unsure	1	0%
No Response	36	8%

NAMES OF THOSE WHO RESPONDED FAVORABLY

(To ensure the confidentiality of those who responded to this question, 47 names have been provided to the leadership at St. Mary.)

Question 11: Would you like to receive more information about how to make an estate gift to St. Mary?

Personal Interview Responses

	Responses	Percentage of Total
Yes	12	19%
No	40	65%
Unsure	3	5%
No Response	7	11%

Mail and Online Responses

	Responses	Percentage of Total
Yes	26	7%
No	332	85%
Unsure	0	0%
No Response	32	8%

Combined Total Responses

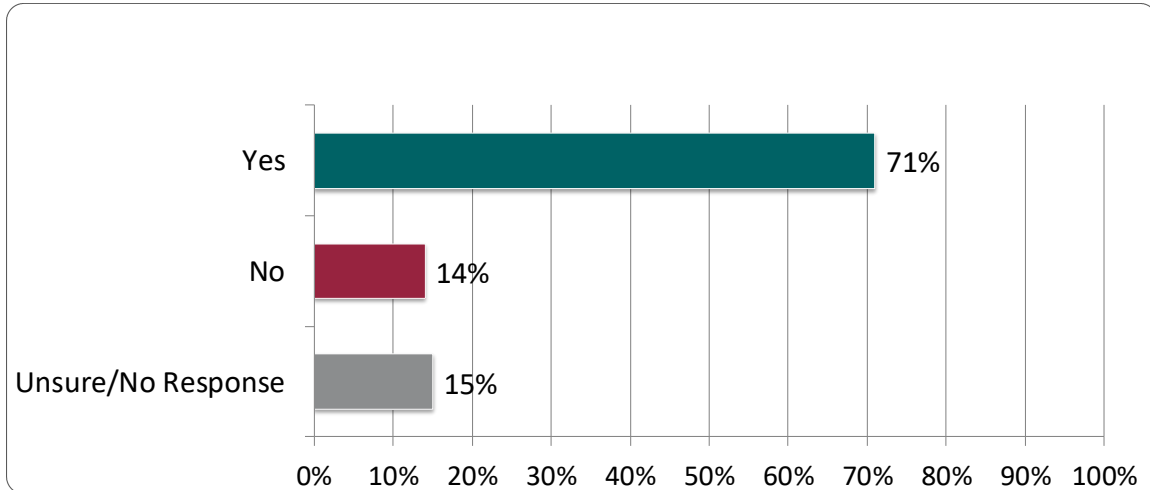
	Responses	Percentage of Total
Yes	38	8%
No	372	82%
Unsure	3	1%
No Response	39	9%

NAMES OF THOSE WHO RESPONDED FAVORABLY

(To ensure the confidentiality of those who responded to this question, 38 names have been provided to the leadership at St. Mary.)

Question 12: If a campaign is conducted by St. Mary, will you make a gift or pledge?

Combined Total Responses



Personal Interview Responses

	Responses	Percentage of Total
Yes	53	86%
No	3	5%
Unsure	4	6%
No Response	2	3%

Mail and Online Responses

	Responses	Percentage of Total
Yes	267	68%
No	61	16%
Unsure	30	8%
No Response	32	8%

REPRESENTATIVE SAMPLE OF RESPONSES

- I will designate my pledge to projects I agree with.
- I will give, provided I see first-hand what projects will be funded.
- Our allegiance is to the school first.
- If changes are made in the church over the school improvements, I will likely not give.

Question 13: Will you please estimate what range of pledge you might consider if St. Mary embarks on a capital campaign over a three-year pledge period?

RESPONSES

Self-Reported Gift Level	Personal Interview	Mail/Online	Total
\$0	3	62	65
\$1 - \$99	0	8	8
\$100 - \$499	0	20	20
\$500 - \$999	2	21	23
\$1,000 - \$2,499	8	82	90
\$2,500 - \$4,999	18	79	97
\$5,000 - \$9,999	7	22	29
\$10,000 - \$14,999	8	0	8
\$15,000 - \$19,999	1	9	10
\$20,000 - \$24,999	1	0	1
\$30,000 - \$49,999	2	1	3
\$50,000 - \$74,999	2	0	2
\$75,000 - \$99,999	1	0	1
No Response/Unsure	9	86	95
Total Responses	62	390	452
Total Gift Range	\$393,480 - \$530,280	\$736,821 - \$743,221	\$1,130,301 - \$1,273,501

Question 14: Will you please estimate what sort of initial payment you might make toward a campaign?

RESPONSES

Self-Reported Gift Level	Personal Interview	Mail/Online	Total
\$0	8	75	83
\$1 - \$99	0	20	20
\$100 - \$499	1	68	69
\$500 - \$999	0	33	33
\$1,000 - \$2,499	5	31	36
\$2,500 - \$4,999	1	7	8
\$5,000 - \$9,999	3	7	10
\$10,000 - \$14,999	1	0	1
\$15,000 - \$19,999	1	0	1
No Response/Unsure	42	149	191
Total Responses	62	390	452
Total Gift Amount	\$51,150	\$125,351	\$176,501

Question 15: Do you have any further comments or suggestions that would be helpful to parish leaders as they look at potentially embarking on a capital campaign? Do you have any concerns that might keep you from supporting a campaign?

Campaign Suggestions

- I pray for you during this process, that it will produce a better St. Mary Catholic Parish for years ahead.
- With Mass attendance declining, I am concerned about a major capital campaign.
- Please be sensitive about ask amounts that aren't too aggressive.
- I'd like for request amounts to be expressed as a consideration versus an expectation.
- Please coordinate the timing of pledging for this campaign to not conflict with other asks or payments such as the January announcement of tuition increases, etc.

View of the Organization

- I am concerned about recent changes regarding altar servers. Letting altar girls go was a big mistake. Girls have a Vatican-approved right to serve at Mass. Some of us are hanging on to the parish by a thread and some are leaving because of these rules and the environment they create.
- I want to see better control of spending and regular financial reports and statements.
- The parish staff is top-heavy and there is a lot of overlap. Reduce staff and save on that expense.
- The priests' accents are a barrier.
- I love the baldacchino and hope it is restored and preserved. It is one of the few treasures left from the original church.
- Recent decisions at the church have been confusing. We should run the church more like a business. You have spent money so poorly in the past that I don't trust the church management.
- We need a parish administrator to oversee the business of the church.
- Parish communication was better under Fr. Alvaro. This should be improved.
- We need more transparency about those serving as parish leaders volunteers. I don't even know the members of the Pastoral Council. We need to elect these leaders instead of appointing them.
- I'd like to know about our community's plan for growth.
- What is the plan for the food pantry? Is it a core ministry? It seems to be getting too big.
- The discussion at the town halls seemed more controversial than what I believe the parish really feels about these projects. There was not a representative cross-section of the parish population at the town halls.
- It is hard to feel a part of the church here if you don't have children in the school. We don't feel attached to this parish.

Question 15: Do you have any further comments or suggestions that would be helpful to parish leaders as they look at potentially embarking on a capital campaign? Do you have any concerns that might keep you from supporting a campaign? (Continued)

View of the Proposed Plans/Building Suggestions

- I support maintenance of the current facilities. Repairs are a much higher need than beautification.
- Maintenance projects should be planned for in the annual budget, not included as part of a capital campaign. Why can't we cover these needs through weekly collections?
- In regards to supporting a capital campaign, our concern relates to the addition 17 years ago. It doesn't appear as though it is well-maintained. Why are we spending money on things like moving the choir loft when there are major water stains and damage above the altar?
- I remember the last remodel of the sanctuary which was a nightmare. Many moved to another church for the duration. We could expect that would happen again and they may not come back.
- I'd like to see an improvement in security for the school. Anyone may enter and if there's a problem, we cannot lock doors to isolate the threat.
- We need more strategic facilities plans for the campus, including the administrative spaces.
- Isn't there a surplus at the school to handle some of those projects from past fundraisers?

Appendix



Foundation Prospects

These foundations will accept applications:

- Daniels Fund
- The Catholic Foundation for the Roman Catholic Church in Northern Colorado
- Donahue Foundation
- Mabel Horrigan Foundation
- Petty Foundation Inc.
- J. K. Mullen Foundation
- Routzon Family Foundation Inc.
- The Strohm Link Family Foundation

These foundations preselect instead of accepting applications:

- 6/S Foundation
- Calerich Family Foundation
- The Sam F. and Freda R. Davis 1988 Charitable Trust
- The Devoe Foundation
- James A. Dooley Foundation
- Fox Family Foundation
- John and Florence Fortune Foundation
- Heringer Family Foundation
- Hawk Family Foundation
- Hepp Foundation
- JJP Family Foundation Inc.
- Kenny Foundation Inc.
- Martischang Foundation
- Pema Foundation Inc.
- The Nicholson Foundation
- Priester Foundation
- McCormick Charitable Trust
- McGrath Family Foundation
- Pete Morgan Foundation
- Joe and Mary Moeller Foundation
- Schmitz Family Foundation
- Zoellner Foundation



Demographic Breakdown Chart

Personal Interview Participants

Years of Membership	#	% In Favor	# Will Volunteer	% Will Give
0-5 Years	10	100%	2	100%
6-10 Years	12	83%	2	75%
11-20 Years	11	91%	4	91%
21-30 Years	14	93%	2	78%
31+ Years	12	92%	2	83%
Not a Member	1	100%	0	0%
No Response	2	100%	0	100%

Mail and Online Participants

Years of Membership	#	% In Favor	# Will Volunteer	% Will Give
0-5 Years	74	76%	14	80%
6-10 Years	55	73%	7	73%
11-20 Years	60	67%	8	68%
21-30 Years	62	63%	5	77%
31+ Years	127	53%	1	57%
Not a Member	6	50%	0	67%
No Response	6	17%	0	50%

Personal Interview Participants

Children in School	#	% In Favor	# Will Volunteer	% Will Give
Current, Future or Former Parent or Grandparent	34	91%	7	85%
Other/None	26	92%	5	88%
No Response	2	100%	0	50%

Mail and Online Participants

Children in School	#	% In Favor	# Will Volunteer	% Will Give
Current, Future or Former Parent or Grandparent	165	61%	17	70%
Other/None	219	66%	18	68%
No Response	6	17%	0	17%