

***SAINT ELIZABETH PARISH
UPPER UWCHLAN, PA***

FEASIBILITY STUDY

September 27, 2020

All-Parish Town Meeting

by Kathy Caliendo and Lynn Cummings



kcaliendo@lcdc.us 484.431.4963
lcummings@lcdc.us 609.743.5663

PROFILE OF INTERVIEWEES

50 Interviews 74 Participants

Interviewee Statistics

- Number of male participants 38
- Number of female participants 36
- Number of couples 24
- Number of Individuals 26
- Interviews conducted at Parish 34
- Interviews conducted by phone 16



PROFILE OF INTERVIEWEES

Years as a Parishioner of St. Elizabeth

| | | |
|-----------------------|------|-----|
| • 0-5 years | (4) | 8% |
| • 6-10 years | (4) | 8% |
| • 11-15 years | (11) | 22% |
| • 16-19 years | (6) | 12% |
| • 20 years (founding) | (25) | 50% |

THE PROJECT

Amount Tested - \$5 Million

Project Tested: A 5-year Plan:

“This campaign is intended to address the financial challenges of today and strengthen the long-term foundation of the Parish, by funding 3 specific areas of priority:

*Technology development & capital projects – 20% of the proceeds;
Mortgage debt reduction / elimination - 40%; and A Parish
Endowment Fund, intended to provide support for the School – 40%*

...By proactively addressing these priorities today, we intend to begin our next 25 years fully prepared to sustain and grow the vital spiritual, educational and pastoral ministries of Saint Elizabeth Parish.”

OVERALL ATTITUDES

When asked, “Do you feel at home here?” rating from 1 to 3, the Interviewees responded:

| | | |
|-------------------------|-------------|-------|
| Very Much (3) | 40 | 80.0% |
| Somewhat/Sometimes (2) | 10 | 20.4% |
| Not at all (1) | 0 | 0% |
| Average Overall: | 2.80 | |

I never fully left our other Parish. I still miss the original friends and organizations. We go to Mass wherever it is most convenient. We know the time and place of every Sunday Mass in the area.

Indeed! We love the people, liturgies and the sense that is so strong here about being good Stewards.

Oh yes, very much at home. It has been our faith home and such an important part of our family's life for years. We are better Catholics because of St. Elizabeth.

SIGNIFICANT FINDINGS - STRENGTHS

1. Father Mullin (33 Mentions)

Father is the consummate leader. He had a vision for this parish, drew everyone in, and it has succeeded in many ways because people were willing to go along on this path with him.

2. Programs / Ministries (23 Mentions)

I appreciate the opportunity that everyone here - and every family member - can get involved in the way they may choose. Endless groups and new initiatives come up often.

3. Community (17 Mentions)

St. Elizabeth's is an extraordinary community - so many good, faith-filled and engaged people. It has been a great place to raise a family.

SIGNIFICANT FINDINGS

AREAS OF STRENGTH

| <u>Area of Strength</u> | # of Mentions | % of Total |
|--------------------------------|----------------------|-------------------|
| 1. Father Mullin | 33 | 25.8% |
| 2. Programs / Ministries | 23 | 18.0% |
| 3. Community | 17 | 13.3% |
| 4. Facilities | 10 | 7.8% |
| 5. Volunteers | 7 | 5.5% |
| 6. Saint Elizabeth School | 6 | 4.7% |
| 7. Stewardship Culture | 5 | 3.9% |
| 8. Management of Parish | 5 | 3.9% |

SIGNIFICANT FINDINGS - **AREAS FOR IMPROVEMENT**

1. Inactive Catholics (10 Mentions)

The challenge we face, like other parishes, is that we have a shocking number of homes that are on our books, but they don't give or participate. Really, if the people were in the pews, that would make the financial challenges easier, but that is not likely to happen. Everyone wants to help this (on the councils); there are no simple solutions.

2. Mass Attendance (8 Mentions)

We always see other Saint Elizabeth families there, too – and gesture to each other, as if to say “Hi – you too!”

3. Volunteerism (6 Mentions)

We have so many dedicated people, yet that group is not expanding - the same people have always been willing to serve. I know that the scandals which impacted the Church have had an impact on Catholics, so that is probably part of it. We know people who used to participate, that have just fallen away.

SIGNIFICANT FINDINGS

AREAS FOR IMPROVEMENT

| <u>Area for Improvement</u> | # of Mentions | % of Total |
|------------------------------------|----------------------|-------------------|
| 1. Inactive Catholics | 10 | 10.5% |
| 2. Mass Attendance | 8 | 8.4% |
| 3. Volunteerism | 6 | 9.3% |
| 4. Youth Involvement | 5 | 5.3% |
| 5. Deferred Maintenance | 5 | 5.3% |
| 6. Scope / Size of Parish | 4 | 2.7% |
| 7. Communication | 3 | 3.2% |

INFORMED PARISHIONERS

Awareness of the project:

31 (62%) were aware;

1 (2%) was not aware at all;

18 (36%) only recently were aware.

We paid attention to Father's narrative letter he did awhile back.

I certainly knew that this possibility has been debated for quite awhile.

This is the first I was aware of the splits of the funds.

I don't want St. Elizabeth Church to die. This Feasibility Study says we are losing people and that has created a financial problem. We are leading by scarcity. I believe we should lead by saying "St. Elizabeth is worth it".



PARISHIONER SUPPORT

Agreement with Plan

35 (70%) agree with presented plans;

13 (26%) agree with reservations;

2 (4%) disagreed.

Overall, I would say I agree. Part of me thinks, on no, again?? I do understand it, and this is a function of the drop off in Catholics and in the amount in the Offertory... You will have to reassure parishioners that none of this campaign money can be taken downtown (Archdiocese.)

Yes, Father's plan makes sense. I think the question is whether or not there is enough financial support to make it all happen. We are not in the same position we were in over past years - getting ready to retire and also having to support some family members is our immediate priority.



IS A CAMPAIGN THE RIGHT WAY?

Capital Campaign Process

47 (94%) agree;
3 (6%) agree with reservations;
0 (0%) disagree

We have been through these before and it works.

Without a campaign people will not be motivated.

The problem here is what can we see or touch? Any technology improvements should serve the financial wellbeing of the parish. There should be mortgage reduction, starting with refinancing.



BELIEF IN FUTURE SUCCESS

Can this Campaign Raise the Money?

30 (60%) yes; 1 (2%) no;
18 (36%) maybe 1 (2%) no answer

Since we have done this before, I would say yes, though how much can the older crowd (like ourselves) now give? I hope that there are younger parishioners with families who are willing to step up.

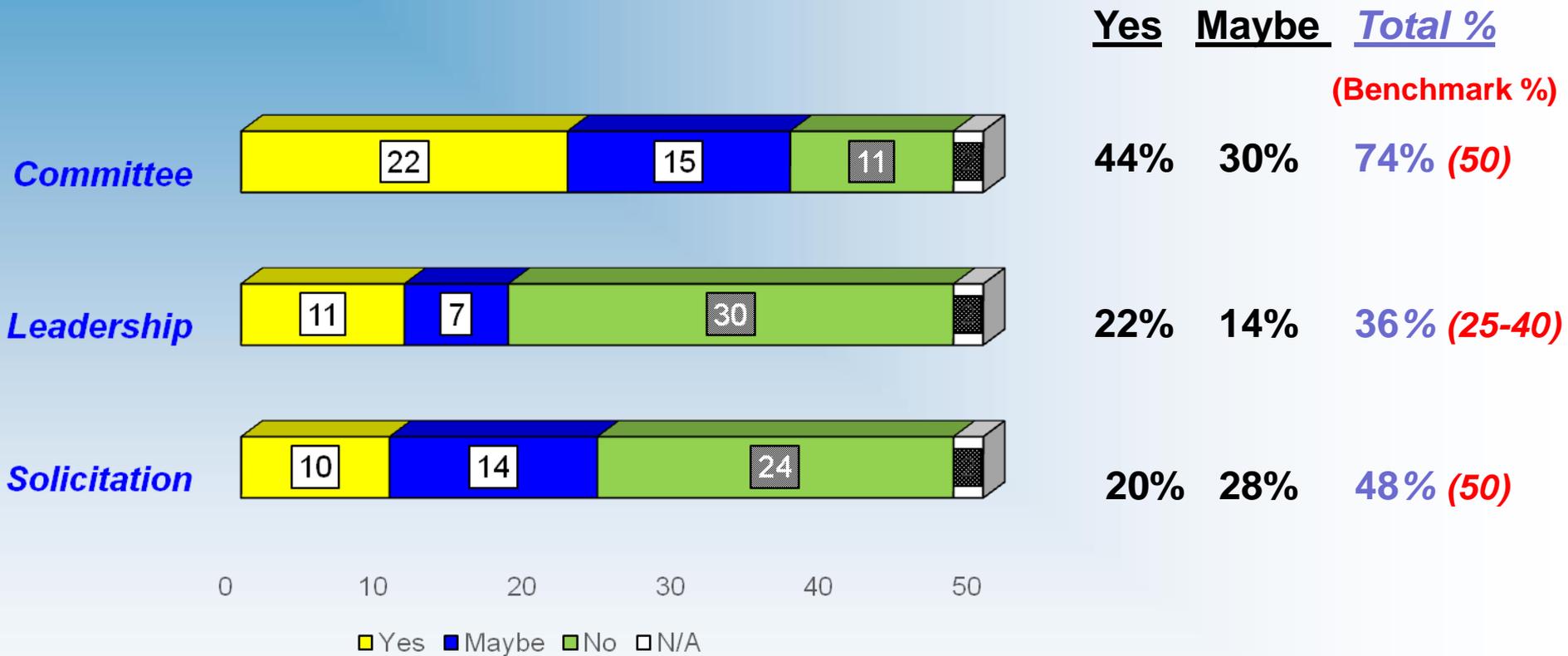
People do give - they are incredibly generous.

I believe we could easily raise \$5MM. The messaging must have the right tone. It cannot sound like the parish is in trouble.

The Five Steps To Success

- **Attend The Volunteers' Workshop**
- **Make Your Personal Commitment In Advance of Kick-Off**
 - **Solicit At Least One—Probably Five to Six Others**
 - **Personally Acknowledge Anyone Whose Gift You Solicit—Whether They Give or Not**
 - **Pray Daily For The Campaign's Success**

WOULD YOU VOLUNTEER FOR...



We travel a lot. Anything Fr. Mullin asked we would do, but not serve on a campaign committee.

Yes, I love this Parish, and this may be a good way for me to get more involved.

**Saint Elizabeth Parish
Upper Uwchlan Township, PA**

**Range of Gifts
\$5,000,000
(5-year pledge)**

| # of Gifts | Actual | \$ Amount <i>Major</i> | Actual | \$ Total |
|------------|--------|---------------------------|--------|---------------------|
| 2 | | 500,000 | | \$ 1,000,000 |
| 5 | | 100,000 | | \$ 500,000 |
| 7 | | 50,000 | | \$ 350,000 |
| 20 | | 25,000 | | \$ 500,000 |
| 34 | | | | \$ 2,350,000 |
| | | <i>Leadership</i> | | |
| 30 | | 15,000 | | \$ 450,000 |
| 55 | | 10,000 | | \$ 550,000 |
| 60 | | 7,500 | | \$ 450,000 |
| 75 | | 5,000 | | \$ 375,000 |
| 220 | | | | \$ 1,825,000 |
| | | <i>General</i> | | |
| 100 | | \$3,000 | | \$ 300,000 |
| 100 | | \$2,500 | | \$ 250,000 |
| 200 | | \$1,000 | | \$ 200,000 |
| 200 | | below \$1000 | | \$ 75,000 |
| 600 | | | | \$ 825,000 |
| 854 | | TOTALS | | \$ 5,000,000 |

**Saint Elizabeth Parish
Upper Uwchlan Township, PA**

Range of Gifts - HIGH

\$5,000,000

(5-year pledge)

| # of Gifts | Actual | \$ Amount <i>Major</i> | Actual | \$ Total |
|------------|-----------|---------------------------|-------------------|---------------------|
| 2 | | 500,000 | | \$ 1,000,000 |
| 5 | 3 | 100,000 | \$ 300,000 | \$ 500,000 |
| 7 | 3 | 50,000 | \$ 150,000 | \$ 350,000 |
| | 1 | 35,000 | \$ 35,000 | |
| 20 | 9 | 25,000 | \$ 225,000 | \$ 500,000 |
| | 4 | 20,000 | \$ 80,000 | |
| 34 | 20 | | \$ 790,000 | \$ 2,350,000 |
| | | <i>Leadership</i> | | |
| 30 | 6 | 15,000 | \$ 90,000 | \$ 450,000 |
| 55 | 7 | 10,000 | \$ 70,000 | \$ 550,000 |
| 60 | | 7,500 | | \$ 450,000 |
| 75 | 4 | 5,000 | \$ 20,000 | \$ 375,000 |
| 220 | 17 | | \$ 180,000 | \$ 1,825,000 |
| | | <i>General</i> | | |
| 100 | | \$3,000 | | \$ 300,000 |
| 100 | | \$2,500 | | \$ 250,000 |
| 200 | 1 | \$1,000 | \$ 1,000 | \$ 200,000 |
| 200 | | below \$1000 | | \$ 75,000 |
| 600 | | | | \$ 825,000 |
| 854 | 38 | TOTALS | \$ 971,000 | \$ 5,000,000 |

**Saint Elizabeth Parish
Upper Uwchlan Township, PA**

Range of Gifts - LOW

\$5,000,000

(5-year pledge)

| # of Gifts | Actual | \$ Amount <i>Major</i> | Actual | \$ Total |
|------------|-----------|---------------------------|-------------------|---------------------|
| 2 | | 500,000 | | \$ 1,000,000 |
| 5 | 1 | 100,000 | \$ 100,000 | \$ 500,000 |
| 7 | 4 | 50,000 | \$ 200,000 | \$ 350,000 |
| 20 | 3 | 25,000 | \$ 75,000 | \$ 500,000 |
| 34 | 8 | | \$ 375,000 | \$ 2,350,000 |
| | | <i>Leadership</i> | | |
| 30 | 13 | 15,000 | \$ 195,000 | \$ 450,000 |
| 55 | 5 | 10,000 | \$ 50,000 | \$ 550,000 |
| 60 | 2 | 7,500 | \$ 15,000 | \$ 450,000 |
| 75 | 5 | 5,000 | \$ 25,000 | \$ 375,000 |
| 220 | 25 | | \$ 285,000 | \$ 1,825,000 |
| | | <i>General</i> | | |
| 100 | 3 | \$3,000 | \$ 9,000 | \$ 300,000 |
| 100 | | \$2,500 | | \$ 250,000 |
| 200 | 1 | \$1,000 | \$ 1,000 | \$ 200,000 |
| 200 | 1 | below \$1000 | | \$ 75,000 |
| 600 | 5 | | \$ 10,000 | \$ 825,000 |
| 854 | 38 | TOTALS | \$ 670,000 | \$ 5,000,000 |

**RESPONSE TO ANTICIPATING THE
LEVEL OF A PLEDGE,
AT THE APPROPRIATE TIME**

| TOTAL LOW RANGE | TOTAL HIGH RANGE |
|--|---|
| \$670,000 | \$971,000 |
| <p>% of Goal: 13.4% Of 50 interviews, 38 (76%) indicated a pledge amount. 12 (24%) would /</p> | <p>% of Goal: 19.4% could not do so at that time.</p> |
| <p>Average: \$17,631.58 <i>Depending on how this rolls out, I may consider making a gift, but it is too early to know.</i></p> | <p>\$25,552.63</p> |

I think you should have all the Receptions at the school and Father Mullin must be the person to make the ask. People do what he asks of them.

**RESPONSE TO ANTICIPATING THE LEVEL
OF A PLEDGE,
AT THE APPROPRIATE TIME (cont.)**

| Major and Leadership Gifts Only – Low Range | Major and Leadership Gifts Only – High Range |
|---|--|
| \$660,000 | \$970,000 |
| % of Goal: 13.2% | % of Goal: 19.4% |

We like to see **50%** of those interviewed stating they would give a major or leadership level gift. There were **37 (74%)** who did so. This response is excellent!

We also like to see **40 - 50%** of the dollars tested (\$5 Million) from this same group. As you note above, even using the High Range, \$970,000 is **19.4%** ...not close enough to **50%** of the tested goal of \$5 Million to project it via this Study.

TIME TO FULFILL PLEDGE / MATCHING GIFTS

Would you prefer 5 years or some other period in which to complete your pledge?

| | | |
|------------|----|-----|
| 5 years | 31 | 62% |
| 3 years | 2 | 4% |
| Lump Sum | 5 | 10% |
| N/A or TBD | 12 | 24% |

Does your employer have a matching gifts program?

| | | |
|------------|----|-----|
| Yes | 6 | 12% |
| No | 41 | 82% |
| Don't Know | 3 | 6% |

***Check your employer's program –VANGUARD has
DOUBLED THE MATCH – 100% thru 2020.
Can you make your first gift in 2020?**



THE MANY WAYS OF GIVING

Appreciated securities / gifts in kind, etc.? For you personally? For the Campaign?

| | | | | | |
|-------|----|-----|-------|----|-----|
| Yes | 7 | 14% | Yes | 45 | 90% |
| No | 24 | 48% | No | 1 | 2% |
| Maybe | 12 | 24% | Maybe | 0 | 0% |
| N/A | 7 | 14% | N/A | 4 | 8% |



STEWARDSHIP

Do you annually evaluate your weekly giving with an eye towards increasing it?

| | | |
|-----------|----|-------|
| Yes | 23 | 48.9% |
| No | 9 | 19.1% |
| Sometimes | 15 | 31.9% |

As our tuition bills go down, we increase our giving.

We try to think about it each year when reviewing our bills; goals for the year.

Honestly, we pay electronically - It is so convenient, but I can't say I think about it specifically.



LCDC FINDINGS

St. Elizabeth is well positioned to conduct a Capital Campaign for the stated purpose in this Study.

- Sentiment toward the Parish, and these objectives is broadly positive. The vast majority of those interviewed either indicated a pledge, or in that absence, anticipated making a gift.
- Top Areas of Improvement are not unique to St. Elizabeth Parish; they are quite common among Catholic communities.
- Volunteer / leadership willingness was very strong.
- Father Mullin's vision for this project is very important and respected. His articulation of it, along with the support of a motivated Campaign team will be impactful, in encouraging parishioners to give.

LCDC FINDINGS

Based upon the results of this Study, LCDC finds that St. Elizabeth is positioned to conduct a capital campaign with a minimum goal of \$2.5MM.

- A goal of \$3MM may be attainable, with a strong Pacesetters' Phase pledge response.
- Establishing this goal is strategic – aspirational but realistic. Achieving a goal is empowering for a Parish; not meeting a goal, even when substantial funds are raised, can be demoralizing. Perceptions are lasting.
- All efforts of this Campaign will be directed not just towards raising these funds but strengthening relationships and growing leadership; building a stronger faith community.

We know that the pandemic has had many and varying impacts. We can forge ahead, always willing to adapt, and with respect towards the voice of this Parish and individuals' needs.

RECOMMENDATIONS

- 1.) LCDC Consultants presented the results of this Feasibility Study to Council Members / Parish Leadership.
- 2.) Present findings at an All-Parish Town Meeting – today (9.27.20)
All parishioners are invited to participate in the Campaign Team kickoff meeting: “The Road to our 25th”

October 13, 7pm in the Social Hall

No implied commitment; do join us; listen and consider what tasks interest and motivate you!



RECOMMENDATIONS

INITIAL CAPITAL CAMPAIGN STEPS:

- Co-Chairs, Honorary Co-Chairs to be named
- Explanation of Team Structure, Committee tasks. Initial meeting timeline set.
- Campaign Committees form: Communications, Special Events (Hospitality), Donor Phase teams. Work takes place outside Campaign Team biweekly meetings.
- Campaign Timeline will be developed to cover:
 - Quiet Phase (top 10-15 potential donors)
 - Pacesetter Phase (appx. 150 households – financial leaders)
 - Leadership Phase (250-300 households – regular givers)
 - General Phase (all other givers; non-contributing households)



CONTACTS

Come join us on Tuesday, Oct. 13 at 7PM!

For Questions, or to RSVP:

Father Mullin at the Parish Office, 610.321.1200

or via email: tmullin@stelizabethparish.org

or

LCDC Consultants:

Kathy Caliendo: kcaliendo@lcdc.us 484.431.4963

Lynn Cummings lcummings@lcdc.us 609.743.5663

