



March 15, 2011

We wish to extend our thanks to all for the cooperation, support and gracious hospitality extended to Holly Bellows and Maurice Seaton throughout the feasibility study process recently completed.

A special word of thanks goes out to Susan Birge, Walter Birge, The Rev. Tony Buquor, Buck Grace, Randy Hartnett, Anne Lynch, Greta Morgan, Sally Myers, Cinda Nimmer, Janine Penfield, Ernie Steward, Libby Wilson, and John Woodward for coordinating the personal interviews and the mailing of the questionnaires.

During the implementation process, we found friendly, concerned, and open communication regarding the proposed campaign and project plans. A total of 165 units participated in the survey; 26 interviews were conducted, 53 responded to the mail questionnaires and 86 responded to the online survey. This represents a total response rate of 42% among the members of the church community that were contacted.

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

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

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Section One:
Feasibility Study Methodology

I. Introduction

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

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

II. The Feasibility Study

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

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

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

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

Phase I

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

Phase II

A sampling of parish members was selected for personal interviews. A total of 26 interviews were ultimately conducted by Holly Bellows and Maurice Seaton of the Episcopal Church Foundation. A listing of the persons interviewed may be found in Section Two: Personal Interviews.

Phase III

A mail survey was sent to 150 households. Included in the mailing was a letter requesting participation in the survey, the questionnaire, the tentative case statement and a self-addressed return envelope.

An online survey was sent to 218 households. Included in survey was a letter requesting participation, the questionnaire, and the tentative case statement.

STATISTICAL NOTE:

- ◆ A total of 150 direct mail questionnaires were mailed to the parish community.
- ◆ Of those, 53 were returned: a mail response rate of 35%.
- ◆ A total of 218 questionnaires were e-mailed to the parish community.
- ◆ Of those, 86 were returned: an online response rate of 40%.
- ◆ Including the 26 who were interviewed, 394 units were exposed to the study. Of those, a total of 165 units or 42% participated.
- ◆ Based on experience, this response rate is an excellent representative involvement from the parish community, lending credibility to the study findings.
- ◆ Of the total that participated, the majority, 52%, attend worship services one or more times(s) per week.
- ◆ Regarding the financial-giving practices of those who responded, the majority, 83%, are regular contributors with a written annual pledge.

III. Elements of a Successful Campaign

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

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

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

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

Section Two:

Personal Interviews

Listing of Persons Interviewed

Tracy Barron
Tom & Barbara Beal
Jim Bender
Shirley Blancke
Susie Buttrick
Barbara Carvey
Al Ehrenfried
Wini Ferguson
Jay Forrester
James & Fiona Hornblower
Bob & Judy Krumme
Judy & Ken Marriner
Chuck Niessen
Janine & Bob Penfield
Lucy & Brian Rosborough
Meme & Wright Salisbury
Debby & Larry Scarff
Bill Smith
Joe Smith
Sally & Sandy Smith
Martha & John Stone
Irene Todd
Rick Wheeler
Win & Elliott Wilbur
Libby Wilson
Margaret Ziering

Results from 26 Personal Interviews

Note: Not all respondents answered all questions.

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

25 Yes 1 No

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

19 Aware 0 Not Aware 7 Aware of some of the needs

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

18 Yes 0 No 7 Yes, but with some concerns

Comments:

I am deeply impressed with the progress and spirit of this church and how it has grown over the past few years. The older generation needs to adjust to these changes. This dynamism needs to be maintained and we need better facilities to do that.

It might be too much money as I think the church might reduce in size over the next 25 to 50 years.

Reserves have been lacking to maintain the current building.

Do the people who come in the main entrance and not the back of the church support this? Many of the older generation are not as aware.

We have been putting on band-aids for too long. We need to do this and do it right. Whether we can afford it is a different question. Many large givers have passed on. Younger givers may not have the same financial ability. I am, however, very much in favor of it.

How many square feet is the new building? What is the cost per square foot?

We are not in a position to give as we gave to the last campaign. We give to real needs of people in need, not to a building. I am not sure we are using the undercroft at any time besides Sunday.

I very strongly question the additional needs, especially the granite veneer exterior.

This is overdue, especially the parish hall where you can hardly move during events.

It has been a long time since any major renovations have been done, so something needs to be done. The facilities are small, given the size of the church and a lot of young families have joined in recent years.

I was aware of the physical plant, but it seems the drainage and water problems are not addressed in these proposals.

We are very supportive of this. Sunday school has grown greatly and new facilities are needed. How does our space usage compare to other churches in town? We seem crowded in both the sanctuary and the parish hall. All of the neighboring churches have expanded in recent years.

We need to expand. I am impressed with the Sunday school. We are doing a good job.

We were aware of the building proposal, but not aware of the additional items.

It would be unwise to restore the old house. We are against its continuing use.

We question if this is the right time to do this, given the economy and the fact that there are a large number of elderly parishioners. Is it better to wait?

Can it be done for \$2 or \$3 million? We already spent so much on it. It is a lot of money, but I see the need.

I am concerned about the economic times.

I need to learn more about the specifics of the financial plan.

We should talk to First Parish about possible cost overruns since they used the same architect.

I would rather not have something fancy, just something nice. We want to be able to afford it.

Where was the input? Did we collect those in a list? People are confused about the way the committee has not had any dialogue. Where did the suggestions go?

If this whole plan does not make it, look at the undercroft. I believe it is pretty much untouched. Spend some money on making it better with temporary space that could give us some breathing room. Make it look nice, use it, and it will give us time and generate parish excitement for this project. Things have not been communicated well.

Did planners look hard at numeric trends and find that Trinity has truly outgrown its plant?

Early planning to make Trinity inviting stressed what is wrong with Trinity. This led to negative, complaining sessions, and the exhaustive listing of things that had to be fixed. But would these items, if fixed, really prompt people to join Trinity? How about emphasizing the good things about Trinity that keep us coming back for decades?

In planning to build a new parish hall of 2,200 square feet size and at great expense, was full consideration given to the 2,500 square foot social meeting space that has served us so well in the undercroft?

If large weddings and funerals could not fit in the present parish hall, why were they not held in the larger space in the undercroft?

If the problem is kitchen location, large events can always be served by an outside caterer or food can be prepared upstairs, put on electrically heated/cooled serving carts and wheeled, via elevator, into the undercroft.

It is harder and less interesting for an architect to renovate a space than to build anew. However, the challenge in these times is to be resourceful and to upgrade what we have.

It was decided that the present parish building, built in 1947, was too old to be upgraded. If such were true, that all buildings built before 1947 should be demolished, then two-thirds of the town of Concord would be leveled to the ground.

There is a mistaken impression that the Trinity parish is flourishing. My recollection is that the original pledge drive in Y2010 raised insufficient funds to operate the parish, so a second drive was instituted a month later. This too was inadequate, requiring the Director of Religious Education to be fired. This was the person who had much to do with growth in church school attendance on a modest part-time salary. Instead of paying for her services, we are now planning to spend millions of dollars to expand her classroom space!

Trinity's off-street parking has gotten progressively worse over the years, reflecting on the poor judgment of Trinity planners, past and present.

Parish planning should involve the entire parish, throughout the process, not just when you want parishioners' money.

My impression is that present planners have been detached. They have not been receptive to outside comments. I have submitted several comments that have never been acknowledged, let alone responded to.

Much diligent effort has gone into the present study, but I believe such has been misguided, short on innovation, and out of tune with the times. There is rampant hunger, homelessness and privation in the world. Wouldn't this be a good time to moderate our demands, live within our means, and consider doing more for others?

I do not plan to support the present plan. I recommend that the parish, under new planning leadership, take a fresh and resourceful look at its needs and take a different direction.

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

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

	PRIORITY				
	High	Medium	Low	Opposed	Lack Information
a. New Parish House Facility	<u>18</u>	<u>4</u>	<u>1</u>	<u>1</u>	<u>1</u>
<i>Additional Considerations:</i>					
b. Maintenance Reserve for Future Needs	<u>19</u>	<u>4</u>	<u>1</u>	<u>1</u>	<u>0</u>
c. Granite Veneer Exterior to closely match Chapel Exterior	<u>4</u>	<u>8</u>	<u>10</u>	<u>2</u>	<u>0</u>
d. Air Conditioning throughout New Building	<u>14</u>	<u>6</u>	<u>3</u>	<u>1</u>	<u>1</u>
e. Site and Exterior Upgrades (includes increased allowances for lighting and landscaping)	<u>7</u>	<u>10</u>	<u>5</u>	<u>1</u>	<u>2</u>
f. Upgrade to General Interior Finish (includes increased allowances for carpeting, casework and ceilings)	<u>5</u>	<u>11</u>	<u>5</u>	<u>1</u>	<u>2</u>

Comments:

The maintenance reserve is the highest priority and essential. (5)

Setting aside additional money for a reserve fund is hard if we are going to build this, but it is essential.

Maintenance reserve was not handled well in the past.

If granite veneer is costly, then it is less of a priority, but continuity of the look is, of course, desirable. (3)

Granite veneer is important, but should be added later if that is possible. (2)

What is the alternative to granite veneer?

The first view of the church for a newcomer is important, thus landscaping is important. New building furnishings should be new and simple, not luxurious.

My main interest is the church building, not this new building.

I think the current plan is over ambitious. \$5 million is too much and I don't think it can be raised. A lesser building should be proposed. What could be added for \$2.5 million? That is perhaps more realistic.

There is considerable growth, but the older generation doesn't use the building as much as the younger generation does. Scale back the plans to fit with what can be reused.

Accommodating new families is really important. The architect needs to make sure the building is warm and inviting. In this regard, interior warmth is more important than exterior issues. One of the problems is that the old church is not inviting and that needs to be addressed. It should not cost too much to warm up the space. We have been inviting and welcoming and young families are coming. When people come, the interior makes an impact.

It will be hard to match grouting on the chapel.

Lighting is very important and ours should be lit from 6:00 PM to 10:00 PM with inexpensive lighting.

Lighting is very important; it is very welcoming. (3)

Lighting needs to be done so neighbors are not disturbed and it is not intrusive.

Lighting may be an issue with neighbors, especially on River Street. This may mean extra landscaping to shelter neighbors.

You can get nice, cheap lights at Walmart.

Phase the exterior stuff in later.

Having the additional list bothered me as these items should have been included in the building piece, especially A/C. I don't see it as additional.

We should do A/C and heating together.

Do the A/C now or it will be more expensive later. All facilities should have climate and ambiance controls.

We can do our own landscaping. We have talented parishioners who would do it. (2)

Landscaping can be done over time. (3)

Landscaping should be done in part by parishioners. It should look good, but don't spend lots of money on it. I would not agree to spending a lot of money on landscaping. The River Street garden is an excellent example of what volunteers can do if people are willing.

Keep the historic character of the neighborhood. Can we soften the façade of the church with lighting and landscaping?

I do not understand what "interior finish" includes, but do it over time. (3)

What does interior finishes entail? I don't want acoustic tile on the new choir room.

No explanation or detail of interior finishes makes it hard to prioritize.

We should not go "luxury" on interior finishes. Our priorities should be outreach.

Interior upgrades are important so people will use the building. This would be my highest priority for add-ons.

The interior finish money should go to things in the sanctuary.

Interior and exterior upgrades can wait.

If you can't maintain what you have, don't build something new! Granite veneer is non-essential. If a new building is built, it should have A/C, the same for exterior and interior upgrades.

Parking is miserable, but we don't have a solution. Attendance has grown so much we don't understand how we could not provide added parking.

Parking is an issue.

Space is what is important. We can get by without A/C.

I need more information. An architect designs what they are told to design. How are we going to build this structure in a way that has flexibility to anticipate the future needs at Trinity? Does the building have the suitability to be adapted? I realize this is hard to do. If you create classrooms it is based on information. It helps determine the plan. Have we asked all the right questions to anticipate future needs? What is the vision of the church? Who do we want to be as a church and what are our space needs? We need to be clear about this. One question is – how do we get access to the kitchen, especially from the street and parking area? Also, how does someone with accessibility issues get into the building?

The need for a new organ is more important than granite veneer.

Adult spaces should be tastefully finished.

The main thing is the new parish hall allowing for 400.

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

Comments:

The undercroft is a great asset which is used mostly by the children; it should be continued and add even more uses.

Change the seating in both the church and the chapel to chairs. That would allow for more flexible space that could be better used.

Make sure the kitchen is close to, and accessible to, parking so that supplies can be brought in easily. Many of the people doing this are elderly and the present set up is not good.

Access to the kitchen and handicap access needs to be a graceful entrance. A lot of people use it and it is a tiny door and hard to get in.

The location of the coat room could be problematic.

In looking at the location of the restrooms, having all the lavatories in the middle is hard for people unfamiliar with the building or those coming to the church for the first time. This should be looked at.

Does the church know what the town would require for approval?

No heating coils on the roof or handicapped ramps! The same for the main entrance underground. Do this even if we don't build the building. It is a hardship for the elderly.

We need climate control in the chapel.

A new organ would be nice, but I understand why it is being left off now. The need for a new organ is great and has been a need for a very long time.

An insolvable long-term problem is parking.

Drainage planning is essential to avoid flooding.

Lighting is a must.

Lighting in the sanctuary is extremely important and should be included.

There is no access to the parish hall from Main Street.

Kids don't come for the playground and I don't believe we should run a nursery school.

The courtyards have no function and need to be well-planned out.

There seems to be no storage on the main floor and it is hard to bring chairs up from the basement.

We spend a lot of time in classrooms and the parish hall and the facilities are poor.

Whatever is done in landscaping must also be done for the old church. This is not detailed in the plans.

What will the overall heating bill be for the new facility? What is the current heating bill?

The sanctuary needs refreshing with new carpets and finished pews. Also, the lighting must improve.

Upgrade the sacristy to the main church.

Capacity in the big church is beginning to wear.

Look at the drainage and water management issues of the property and roofs. We have rebuilt the roof two or three times. I wonder if the architects consider this a priority.

Parking! (3)

We need a welcoming entrance.

We want to know what we are about. It has to be not only about worship, but about the other things Christ calls us for.

The building should be an income producing space. Maybe we could book conferences.

For years there has been a need for off-site parking. We are shoehorning a property in a residential neighborhood. You need to plan for parking and people before you build.

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

Barrett House

Congregational Church

Diocese campaign (3)

Emerson Hospital

Emerson Umbrella Center for the Arts

Fenn School (4)

First Parish

Local schools

Orchard House

Public library

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

 1 Excellent 18 Good 6 Fair 1 Poor

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

 19 Improving 6 Remaining the Same 1 Declining

9. Does a proposed solicitation period for pledges in the spring of 2011 seem appropriate to you?

 16 Yes 3 No 7 No strong feeling

The sooner the better. Spring is good. Let's get on with it.

Get on with it. People are in a good mood about this campaign.

No, people are anxious about the future.

I don't think waiting will help. Building costs are lower now. People will lose interest.

We need to do more thinking before we move ahead.

It should be early spring, before the school year ends and it becomes very busy for young families.

Spring is a better time than later. There is always demand on us for something. Spring is regeneration time.

There is momentum now.

Let's get going.

Follow through with the proposed timeline and do it.

Give the economy a little more time.

10. Do you think a goal of \$4,970,000 (as outlined in the proposed plans) can be raised in gifts and pledges?

 2 Yes 5 No 19 Don't Know

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

\$2 million - \$2.5 million

\$3 million (3)

Two-thirds of the amount.

It will be a challenge, but it is attainable.

I hope we can raise it.

The people who donated to the last campaign are deceased. We don't know how much the younger generation can give.

It seems like a lot of money. We just make the annual budget. The goal seems too high.

It is too ambitious unless there are a few who can give all or most of it.

\$5 million does not seem like a lot of money for these projects, but I am unsure if you can raise that amount in this church.

If older people are no longer with us, will the younger generation give? Maybe there are people who could underwrite the whole thing? Take this in phases if we can't raise it all now.

I don't know. It is much more of a challenge today than five years ago. Everyone is concerned and therefore more cautious with long-term commitments.

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

22 Yes 2 No 2 Not sure at this time

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

<u>0</u> \$500 or less	<u>1</u> \$500 to \$1,000
<u>0</u> \$1,000 to \$2,500	<u>1</u> \$2,500 to \$3,000
<u>7</u> \$3,000 to \$5,000	<u>2</u> \$5,000 to \$10,000
<u>4</u> \$10,000 to \$15,000	<u>2</u> \$15,000 to \$25,000
<u>0</u> \$25,000 to \$50,000	<u>1</u> \$50,000 to \$75,000
<u>0</u> \$75,000 to \$100,000	<u>2</u> \$100,000 to \$150,000
<u>1</u> \$150,000 to \$250,000	<u>0</u> \$250,000 to \$500,000
<u>0</u> \$500,000 to \$750,000	<u>0</u> \$750,000 to \$1,000,000
<u>1</u> \$1,000,000 and above	

13. If the proposed total goal of \$4,970,000 cannot be fully funded by a capital campaign, how would you feel if the parish were to assume prudent long-term debt to ensure completion of these proposed plans?

7 Acceptable 12 Undesirable, but acceptable 7 Unacceptable

We are talking about a growing congregation so it is acceptable. But, make sure you don't borrow too much. Repayment of \$25,000 per year is probably the max.

Leadership would need to agree unanimously on this.

Unacceptable; this is much more like a depression, not a recession. Debt is very unwise.

Debt makes me uncomfortable, but it is acceptable depending on how much.

It is risky to take on debt since it is hard for us to make the annual budget. Therefore, we would need debt to come from the annual budget. I can't see us being able to service debt payments, so it is unacceptable.

If it means only borrowing a little, then it is OK. If it is borrowing a lot, then no.

It depends on what annual giving can support in terms of repayments.

I don't have much experience with this, but would consider it as an option.

It is acceptable for benefits to the structure that are really important. If we take out a loan, we must tell people the positives of what will come from these changes such as the benefits to the community, as well as rental space that could bring in income.

It would depend on how much debt is prudent to take on. If it is over \$1 million, then I would not agree.

This is not a good idea; very reluctant about debt.

Debt is never acceptable. If you can't afford it, don't do it! Absolutely no!

Interest rates are really low. Look at matching contributions of various kinds.

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

 3 Make a gift to your parish through a bequest in your will.

 2 Create a charitable gift annuity (minimum gift of \$5,000).

Benefits of a charitable gift annuity could include:

- receive guaranteed income for life (i.e. current rates of approximately 5.3% annually at age 65, approximately 6.3% annually at age 75)
- receive an income tax deduction now for the gift portion
- receive some tax-free income from the investment for life
- possibly reduce applicable estate and inheritance taxes

- enjoy the satisfaction that at the death of the final beneficiary, the principal would go to that part of the Episcopal Church you so designate

0 Donate appreciated real property such as a house, vacation home, farm or business property.

2 Send me the *Ministry of Gift Planning* brochure which explains Planned Giving options.

0 Add me to the Episcopal Church Foundation e-newsletter.

14a. 9 Trinity Episcopal Church is already in my will or estate plans.

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

10 Yes 11 No 10 Not sure at this time

16. Among individuals you know, who would make ideal committee members for this proposed capital campaign?

Colby Anderson	
John Anderson	
Sandra Anderson	
Beverley Baxter	
Gordon Bell	
Jean Bell	
Walter Birge	7
Carolyn Coffin	2
Sally Cross	
Scott Doig	
Nancy Fitch	
Patricia Fleischauer	
Sandra Folk	2
Jay Forrester	
Ken Goss	
Buck Grace	2
June Grace	2
Grace Hartnett	
Randy Hartnett	2
Andrew Hawes	3
Brenda Hawes	2
Donald Hile	

Susan Hile	
Rod Hossfeld	2
Leo Jesudian	2
Jared Keyes	
Bob Krumme	
Judy Krumme	
John Lewis	
Claudia Liebesney	
Cheryl Mandler	
John Mandler	
Greta Morgan	3
Emily Moss	
Sally Myers	3
Tom Phillips	
April Prewitt	
Marge Rafuse	
Brian Rosborough	
Lucy Rosborough	
Deborah Stoessel	
Jim Stoessel	
John Stone	2
Martha Stone	3
Betsy Sutter	
Betsy Sweet	
Chris Todd	
Jenny Ubaldino	
Marc Ubaldino	
India Venkitachalan	
Anne Wheeler	
Libby Wilson	2
Anne Winslow	
Beverly Woodward	
John Woodward	
Betsy Yamron	

The people on the Ministry Committee (5)

We need more younger people in leadership, including youth.

Include more women.

Think about including wealthier people who can ask their peers.

New and younger people should be represented as it is their future.

Leadership depends on giving capacity.

Newcomers

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

Comments:

Tony Buqour and the other clergy are open and welcoming and good at keeping newcomers.

Our leadership is phenomenal. (7)

Father Tony is the best thing that could ever have happened to Trinity. He is remarkable. (9)

Our clergy are strong, positive forces that project stability and continuity.

We have growth and the number of children is gratifying. (2)

Whatever we do to support the children is a plus.

We have new members, including lots of younger families. (6)

We have a wonderful group of new young families who are involved and likely will be for a long time. (2)

There is growth. (4)

Everyone is excited about the youth and young families coming in.

The atmosphere is supportive, welcoming and energetic.

This is a very active parish and people get involved.

This is a very welcoming and dynamic place that cares for its people, both older and younger. It is a very giving church.

We are a friendly and outgoing group at Trinity and we welcome all visitors. It is nice to have younger families. We work well together.

We have committed people who are well connected. People care about one another.

People here are warm and committed.

We have a good music program. (3)

The choir is fantastic.

We offer many programs and community services.

Coffee hour is bursting at the seams.

The parish hall was built based on the old chapel and it is way too small. The needs are obvious!

The new building will make Trinity compete well with those who are church shopping.

Concord is an amazing town that draws people here.

People will need to value what the benefit will be of the campaign. We need to succeed in communicating this.

The ministries of Trinity are very powerful and a definite positive.

Many environmentally-friendly people will help with designated gifts.

Momentum is continuing and the congregation is very positive. 2010 was the first time revenues exceeded expenses. A balanced budget for 2011 is proposed. Unless the economy declines, we can maintain this. We have a strong basis for moving forward.

Trinity has evolved into a welcoming and spiritual community.

This is a positive campaign and is being done well. It offers a lot.

The parish has a good spirit.

We can't discount the power of prayer.

Concord is considered an affluent community.

Growth of the church school is great. (2)

There is significant accumulated wealth here.

We have tradition and promise.

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

Comments:

Other than one or two individuals, I don't think anyone will oppose this. Most people seem positive. (2)

Many older, wealthier members have died.

People don't have the money they had 10 years ago to give.

The economy! (4)

Can the money be found?

Fundraising is always a challenge.

Finding the major donors we need to meet the goal.

The goal is too ambitious.

Episcopalians are not that generous; they are tight with their money.

People will need to give substantially more than they give annually. That is a challenge.

Raising the money! (8)

I think you will have a problem finding people who believe in this and are willing to commit financial resources.

I don't know how much people can give. There are a lot of competing priorities.

Some people, like us, are still on the fence and need to be persuaded that a new building is needed.

I think the real questions are about the need. The parish was isolated. The communication before was more open and we rejected the first Belluschi design. There was very intense communication in the first campaign.

People need to be excited about this and stay that way. Good communication is essential to get people involved.

We have different constituencies who use the church, different generations and different users. People who think Sunday school and music are important may not want to give to anything else. Don't go down this road. We need accessibility, bathrooms, etc.

The plans are too big and too expensive.

Many people dislike disruption and this project will take about a year. (2)

I don't see any controversy in what is being presented, but the disruption and intrusion will be an unpleasant time period.

There may be a few people who don't want change.

Our neighbors may cause problems, one in particular.

Moving or destruction of the house will be controversial.

Check on the water table, as we are close to the river.

When will it be finished? Make sure there are no cost overruns. Be realistic and stick to what is agreed will be spent or you will lose credibility with people. Make sure quality construction is performed. Things need to work properly – no more leaks! People will understand if the plan makes sense and we stick to it.

River Street issue – it is in the historic district.

Parking will always be a problem. It is horrendous. It is a critical issue. (2)

How does the town view this, considering the parking issues?

The size of the lot; is there a long-term solution?

Do we want to put this much money into the physical plant?

I am worried about the size of the kitchen. It was reworked.

I see a problem with building. There has been no communication with our neighbors.

If we are going to do it, then do it well. Don't scrimp.

The town of Concord and the Historic Commission may cause problems.

We need to create connections among generations.

There is not enough optimism on people's part. Think positive!

19. What added ideas or suggestions do you have which might be helpful to the leadership in making this important decision?

Comments:

It is really important that we do this. The capacity is here, but I can understand that this is a goal the church has never confronted before. We can do it! For young people today, \$5 million may not sound like a lot. We have three pools of donors – (1) the heavy hitters who give annually, (2) those who are retired or close to retiring, and (3) the new generation of young people who want these facilities.

We give credit to the leadership for working so hard to identify needs and having the courage to share them. It is impressive and we support them. We can do this.

Lighting for the church needs to be addressed NOW.

Lighting in the church is terrible and must be addressed.

There should be memorial/appreciation gift options. There is a book in the narthex recording names of all who gave for the big church.

Start over again as we did in 1959. We restarted, looked at the plan, and then we were successful.

We should look at what we have and how it can be improved, not a new \$5 million building. In these times being frugal and making do is how we should live. We had trouble meeting our operating budget, two appeals, and let go of our religious education staff. Now we are talking about a \$5 million building!

I very much hope we can do this.

I would hate to lose the good feeling that currently exists at the church. Avoid division in this campaign.

Parking will be an ongoing issue but we have gotten by so far and we will in the future.

Parking issues must be investigated.

No borrowing!

Choose a contractor who provides quality, on budget, and on time. Check reliable references on all three of these things.

The project should be scaled back. Yes, we need a parish hall desperately but this is way too big.

The beauty of the church is very important. The new building should not block light to the big church.

We want Trinity to succeed and grow, but we also need to keep this all in perspective.

We need more volunteers.

Speak to as many people as possible and make sure people's voices are heard. It should not be a decision made just by the vestry or rector.

This must be a good story. People need to know all the details and have the information presented in more than one way. People don't take in information unless it is repeated many times and in many ways. It must be relevant. One-on-one connection is most important and you must ask them personally to get involved.

The campaign must be relevant in the lives of the parishioners.

It would be nice to get families who have left the church for various reasons to come back. Can we get them back?

We are looking for a family-style, friendly parish. We need to appeal to all with a warm building, good programs, and welcoming people.

I was sorry to see that the organ was not included.

Lighting in the main church desperately needs to be improved. It would be nice not to have to wait for the next phase.

Choir placement needs to be addressed.

To get the lead gift, we need to consider naming opportunities for the parish hall or other parts of the building. This must be given consideration, especially for long-term families who have been in the community for centuries.

I would not like to see duplication of things previously done, such as the elevator. There is no sense in redoing things already done.

Will the new boilers be wrapped? Take improvements done in recent years into account and don't redo them at extra cost.

Make sure sanctuary issues are addressed with the same enthusiasm as the new building. The sanctuary must be more welcoming. The lighting is bad, the floors are cold, the pews are falling apart and the acoustics are bad for music. These are equally important as the new building. It is not as costly to do some of these smaller things.

How will things work during construction? How will Trinity run? This will be very disruptive.

The amount of money does not justify what is being proposed. I don't see an increase in the facilities as being worth \$6 million.

The last campaign was very successful and it was in part due to excellent communication.

The renovations need to be highly effective in space utilization.

When using the basement, make absolutely certain the engineering is done so that no flooding occurs.

Maintenance fund needs to be a high priority.

Go slowly. I am worried about the financial situation along with that of the country. Looking at the spring of 2011 is pushing it. We have to be mindful of our stewardship. In light of this, keeping up annual giving will be a challenge. On the other hand, I don't want to lose young people or see the church go downhill.

Having done a lot of fundraising, I am a believer in endowments, having something in reserve. Make sure you can afford the facility once it is built. Make sure it is practical and useful and paid for. Make sure a maintenance reserve fund is in the initial goal.

Pray to the Lord; good, strong, vocal prayer.

We should look at St. Paul's Church and learn some lessons about proper interaction with town authorities. It is clear being on the right side of town authorities is what is mission from the project. We need a supportive rather than competitive association. We need to plot the right strategy.

The plan now seems to be all or nothing. Small scale steps seem to be poorly connected. If we can not get the full amount, there is no plan for small steps. People could get defeated.

We feel a lot of money has been spent. The whole project has taken so long. I know that First Parish had a lot of problems with these architects. I am concerned that the architects created a plan that is way more than our parish can afford.

I oppose the playground and nursery school. We don't have parking pickup or drop-off; it would be a nightmare.

The layout and plans need more attention and need to be thought out more. The brochure says there are 144 tables, but where is the storage for them? Carrying tables to the undercroft is a bad situation. Can there be dialogue from others on the functionality of this plan?

The nursery school is now a long walk to the sanctuary and there is only one entrance.

I don't like the layout of the kitchen or archives in the basement which floods. You can't easily access the kitchen with this plan to unload a car.

This building is going to belong to the diocese and there are people who already think we give too much. We don't like to see money wasted.

Get a new architect.

When you walk in the church you know people know what the ministry of the church is.

Vestry needs to make the case as to why it is important to do this now and not wait. This investment will produce income opportunities.

Have a positive outlook so it reflects on the people you are asking. Don't be a moaner and groaner.

Section Three:

Direct Mail / Online Responses

Results from 139 Direct Mail / Online Responses

Note: Not all respondents answered all questions.

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

120 Yes 15 No

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

87 Aware 6 Not Aware 40 Aware of some of the needs

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

83 Yes 9 No 39 Yes, but with some concerns

Comments:

It is a great deal of money to raise, but we should try.

As a family we are fine with the way the church is today and don't see the same needs as expressed in the enclosed capital campaign. However, we are not as aware of many of these needs as others who have been with the church for decades and who have to cope with everyday issues such as eco-feasibility, upgrades, etc. We do not see a need for huge improvements as outlined, but maybe a more scaled down version to make the parish hall space bigger and to let in more light through the blocked windows into the existing church. We appreciate all the hard work going in to the research of this from many.

You have an overly fat budget which does not reflect good moral value for the future so we will not support you financially.

The cost seems like a lot, given the economic climate! I grew up at Trinity and I am not sure that such a large change is necessary. Perhaps it can be scaled back some? I do like the design and feel of the plan, especially opening up the chapel windows to light again.

With the predictions of a struggling economy for years to come, I wonder about the capital campaign costs which could result in very limited contributions.

The need for more space is evident, but I don't know if I am in the position to assist financially.

I am very concerned about what seems to be a lack of parking. The proposal allows for an increase of 400 individuals standing or 144 individuals seated in the new space. It is unclear to me where these people will park. In addition, with the population aging there will be an increased need for handicap parking. I don't see where this proposal addresses these concerns.

The total proposed goal is \$4.97 million but then there is a list of another million which includes additional consideration. I am concerned about being able to maintain the increase in operating costs of such a facility.

The project looks beautiful, but seems a bit ambitious.

I wonder if we can raise this amount in the current economy. I do think things may get worse (not better) but also we will probably face inflation later and the cost will go up.

I agree with the needs, but, and maybe I'm naive, it seems to me like a huge project and the \$5 million figure just seems staggering. I worry about changing demographics; will the community increase in size, or will we end up with a great big facility and no one to fill it? On the other hand, people tend to finally become active in church as they get older and have more time, and that would mean all us Concord baby-boomers ought to be on schedule to get more involved in the church.

I'm a seasonal parishioner and making a financial commitment would be difficult, although I would certainly make a contribution. I'm not in church for enough of the year to be sure where I would like to see changes made. I would rely on the opinions of the people who are.

I'm afraid I will not be able to give enough to make this possible and I want it to be possible.

Due to my age (elderly) I will not be able to contribute as much as I should like to. I did participate in the capital drive for the church a good number of years ago. One concern I have is the difficulty in finding a parking space on Sundays, especially in the winter.

In a tough economy, it will be difficult to make the commitment.

We certainly need larger and updated space to accommodate the needs of the parish. Have we considered using the space in the undercroft and putting a kitchen there?

I see some problems with the proposed model; I also hear others expressing the same concerns about placement of the kitchen, handicap accessibility and other things.

I would be interested in seeing a short and long-term curve of the demographics (i.e. the population growth to support this huge increase in space).

The parish has many needs right now and not all of them are being met. I would hope any capital campaign would allow for small contributions, not just large ones.

My concern is if this large a sum is achievable. Is there any thought given to a reduced scope in case the funds do not become available?

I think the condition of our facilities is now at risk because of what appears to me as a constant struggle for funds for upkeep and funds for clergy and staff. Beyond that, I think our facilities are inadequate for serving the children, young people, and younger families we see joining our congregation through the blessed efforts of lay members and clergy. I think Trinity has to be revitalized physically as it is being revitalized by way of new members and, consequently, new spirit. I think it is time to do this. I think putting it off would not be a positive alternative in any respect.

I would hope that green technology would be used, like solar panels, etc.

I'm not sure if the economic climate will restrict giving.

Some of the items included are, in my opinion, over the top. A/C for the whole building is a bit much, considering that the church is not used very much during the two hottest months of the year, and church attendance is lowest then. \$195,000 for landscaping is also a bit much.

I know this is not "in bounds" to this effort, but I would like to see the main church addressed as quickly as possible. There are so many wonderful things about our parish; the main church is by far the greatest detractor. It is a dark, uninspiring space. I despise it (I guess this really validates that you pick a parish based on the people and not the physical space). A wonderful example for how minimal funds could be transformed is St. Paul's in Brookline. I cannot stress how strongly I feel here. I would be much more likely to donate to this effort than to the parish hall.

If we are not able to raise the entire amount, I hope we will do what we can afford.

The maintenance of the facility is considered an add-on, and should be part of the fundamental campaign. This is an old problem, and as a result, facilities decline because of lack of funding.

The church seems to me to be in pretty good shape as compared with others we've attended. We contributed significantly in other church capital campaigns elsewhere. The economy and college tuitions have hit us very hard. While the church is high on our list of priorities, we are not in a position to meaningfully support another capital campaign.

I don't see the need to pay extra for an outdoor playground for the church school. Children are in church school for a very short period of time and ought to be in class. If Trinity had a nursery school I would feel differently and I do realize this expenditure is only a tiny fraction of the total needed.

It is poor timing.

The economy is not great.

I was aware, but the total size was a surprise.

In this recovering economic environment nationwide, construction costs have significantly decreased and individuals are feeling cautiously better about the future.

SSJE, the Episcopal monastery in Cambridge, MA, is just completing a \$10 million renovation of its facility and has most money in hand. Consultants from SSJE and Trinity-Copley Squares \$53 million campaign in the early 2000's are available for counsel.

I am concerned about the feasibility of raising enough money.

What about parking?

The growth of the congregation is a powerful tribute to both the needs of the congregation and the success of the church leadership and its programming.

We wish to voice a significant concern. The more "glamorous" goals of a capital campaign may drain needed funding from the humdrum and less exciting goals of annual giving. The most recent annual pledge drives have been long and arduous slogs lasting from October through the end of January. Recent end of fiscal year closes have also proven to be suspenseful cliffhangers. The addition of a capital campaign (addresses to the same potential donors) may negatively impact annual giving and make it more difficult to fund the annual operating budget at current levels. Note: At least three revenue lines in the 2011 budget are structurally shaky – plate gifts, special gifts, and Trinity Fayre proceeds, and this lack of budgetary stability will be exacerbated if the launch of capital campaign giving lures donations away from annual giving.

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

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

	PRIORITY				
	High	Medium	Low	Opposed	Lack Information
a. New Parish House Facility	<u>91</u>	<u>27</u>	<u>6</u>	<u>4</u>	<u>1</u>
<i>Additional Considerations:</i>					
b. Maintenance Reserve for Future Needs	<u>64</u>	<u>53</u>	<u>7</u>	<u>2</u>	<u>4</u>
c. Granite Veneer Exterior to closely match Chapel Exterior	<u>21</u>	<u>43</u>	<u>47</u>	<u>12</u>	<u>6</u>
d. Air Conditioning throughout New Building	<u>44</u>	<u>45</u>	<u>36</u>	<u>5</u>	<u>2</u>
e. Site and Exterior Upgrades (includes increased allowances for lighting and landscaping)	<u>26</u>	<u>64</u>	<u>32</u>	<u>5</u>	<u>4</u>
f. Upgrade to General Interior Finish (includes increased allowances for carpeting, casework and ceilings)	<u>26</u>	<u>62</u>	<u>31</u>	<u>4</u>	<u>5</u>

Comments:

We don't see how the granite veneer can be done.

I care so much about the "feeling" of our dear Concord church. That is, aesthetically. We love the old chapel; it is a gem. We have disliked the new church aesthetically so much, for years. This sounds very rude, but the bleak feeling of the hard pews makes me think of a railroad station waiting room. The window makes me think of the Cirgo sign in Boston. All that the new ministry has done to warm up that stony space with felt banners, with beautiful music, with the reverent liturgy, above all with the spiritual warmth, kindness, dignity, honesty and love of the clergy and the congregation as well, has been a MIRACLE! Hooray for you all!

Heat the chapel better during the winter.

We rely heavily on the hard work and informed decisions of the excellent committee in whom we have a good deal of trust.

Why aren't site and exterior upgrades included in basic costs? The same with upgrades to general interior finish.

We need a new kitchen.

Trinity obviously needs the space and it is wonderful that the parish is growing. Knowing that churches frequently defer maintenance, I strongly endorse planning to circumvent that neglect.

If the art continues to be displayed, we need gallery lighting for the art space.

I want it to look pleasant, but the building is more important than "finishings" primarily.

We would soon regret skimping on any of these items.

Is the cost of what we have now already paid for written off? How long, for how many years was the current build-out supposed to last? Have we exceeded that time?

Parking should be a major concern. (2)

Improved exterior is very important; currently we're kind of invisible.

Maintenance reserve is an absolute necessity! Repairs are always needed.

Environmental sustainability is the paramount priority. Use the earth's resources wisely, being caring stewards of God's creation.

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

Comments:

Improve the parking on the street, especially during the winter.

You could refinish the pews and kneelers.

The sanctuary needs to be reconfigured at the altar, along with the steeple, and the floors need redone.

I assume it is all handicap accessible?

I see additional restrooms and I guess there are two near the kitchen, so does that make four total?

A new organ (but I know it is not possible).

Be sure to include increased heat in the chapel.

Yes, lighting in the main sanctuary, HVAC in the chapel, address the ailing organ with repair or new acquisition, and the splintering pews.

Update existing spaces rather than new building.

The organ for the main church needs addressed. (4)

We need easier/better handicap accessibility.

Lighting and sound in the main church needs to be addressed.

Parking! (7)

Access to building in inclement weather is a problem.

I saw mention of a music library but not of a general library. I hope I merely missed this. A good and pleasant library is very important!

Main church renovations, as proposed in the master plan, are needed.

We need direct access to the kitchen from the parking area.

Gallery space and lighting is needed.

As a handicapped person, I see real problems getting into and around the area.

Exterior protection of the chapel's stained glass windows should be addressed.

Use of the facilities by many people from outside Trinity Church should be looked at.

I understand our organ needs work. When we put Trinity in our wills, it was to replace our organ. That was ten or more years ago, when the need to replace it was declared. A lot of theology, spirituality, community, and joy happen by way of our singing church. The need here is concurrent with our other church facilities.

In my view, the proposed plans are very comprehensive and complete. The parish has studied its needs and the proposed solution in great detail. I do not know of additional needs that are not covered by the proposed plans.

A remote parking lot with shuttle service might be considered.

Worship space should also be air conditioned.

We are very disappointed that the problems in the worship space are not being dealt with, especially the lighting, acoustics, and the inflexibility of the spaces.

Organ replacement (or major upgrade) is excluded from the current project. Continued stop-gap repairs to the current organ may result in significant unbudgeted expenses. This would increase the likelihood of future year-end deficits if future annual budgets do not allocate sufficient funds for organ upkeep.

The conceptual drawing in the brochure shows that on-site parking is reduced to a mere six spaces. This will limit accessibility for those parishioners with mobility issues who have relied upon the availability of nearby parking spaces in the current two parking lots located at the back of the main sanctuary and in front of the church offices. For able-bodied parishioners, reducing current off street parking will put further pressure on the limited available parking spaces on Elm Street, Main Street and River Street and force cars to park further down Elm Street towards Route 2. There are obvious safety issues involved when parishioners of all ages end up walking in the street during the winter season due to unsafe sidewalks. Elm Street road traffic, in particular, moves at relatively high speeds as drivers head towards Route 2.

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

Bike Path

Concord Academy

The Diocese (2)

Emerson Umbrella (3)

Fenn School

First Parish Church

Fowler Library

Other churches

Land Conservation

The high school (8)

Nashoba Brooks School

The Library

Taxes in Concord are sure to rise with the building of CCHS and cuts in state funding to municipalities could impact the project.

Concord always seems to have one or two major campaigns running.

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

 0 Excellent 71 Good 55 Fair 6 Poor

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

 57 Improving 66 Remaining the Same 7 Declining

9. Does a proposed solicitation period for pledges in the spring of 2011 seem appropriate to you?

 63 Yes 16 No 54 No strong feeling

I would not make such a large fund drive until the economy improves.

We need more time. The fall of 2011 seems better.

Waiting until the spring of 2012 would give the economy more time to recover and would provide convincing evidence that 2010 pledge levels (to fund the 2011 budget) can be successfully sustained in the fall 2011 annual appeal (to fund the 2012 budget). It seems over-optimistic to launch a major capital campaign in the spring of 2011 after laying off a church school director a little over a year ago and barely obtaining the pledge income to restore the same position for 2011 and that only after a very protracted annual appeal. The lengthiness of the fall 2010 annual appeal suggest that annual giving is not yet robust and that we are not yet “out of the woods” economically speaking.

10. Do you think a goal of \$4,970,000 (as outlined in the proposed plans) can be raised in gifts and pledges?

 26 Yes 14 No 93 Don't Know

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

\$1 million

\$2 million

\$3 million

Half the amount.

I believe that the final cost of the project will exceed \$5 million and I am not sure that Trinity can raise that sum.

The financial outlook for the next few years is less than promising and we wonder if the stated goal could be achieved.

It is possible, but I am not confident that it will be reached.

We should be able to raise the \$5 million, given the significant expansion of the parish in the last several years, particularly of those with children. However, getting these new (and old) parishioners to believe that they have a responsibility for and stake in the future of the parish is another matter.

The gifts will need to be high. How long is the pledge for?

The goal seems to me to have been carefully thought through. I think the country's finances are improving. I am aware, however, of neighbors and members of our church community who have lost their jobs. I also know that our church community partially funded a new church school director, with prodding. So, I think we must.

The Building Maintenance Committee must feel the goal is attainable.

Has the stock market made members feel better about their net worth?

It will be a big stretch, but I am optimistic that it can be raised.

The response to this feasibility study questionnaire will provide a “straw poll” answer to the question whether the goal can be raised. We are currently skeptical that this sum can be raised based upon the evidence of the last few annual giving campaigns. However, it is possible that capital giving will be much more appealing than annual giving.

A major readiness issue – Does the Campaign Committee already have a substantial (\$1.5 to \$2.5 million) nucleus fund of advance pledges from parishioners who are financially able to contribute at a major level? If yes, these advance commitments may have already redirected dollars from annual giving to capital giving. If a nucleus fund does not exist, the campaign launch should be delayed until major “up-front” pledge commitments have been obtained and can be announced as part of rollout.

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

104 Yes 8 No 25 Not sure at this time

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

<u>21</u> \$500 or less	<u>12</u> \$500 to \$1,000
<u>17</u> \$1,000 to \$2,500	<u>6</u> \$2,500 to \$3,000
<u>9</u> \$3,000 to \$5,000	<u>10</u> \$5,000 to \$10,000
<u>8</u> \$10,000 to \$15,000	<u>8</u> \$15,000 to \$25,000
<u>3</u> \$25,000 to \$50,000	<u>2</u> \$50,000 to \$75,000
<u>0</u> \$75,000 to \$100,000	<u>0</u> \$100,000 to \$150,000
<u>0</u> \$150,000 to \$250,000	<u>1</u> \$250,000 to \$500,000
<u>0</u> \$500,000 to \$750,000	<u>0</u> \$750,000 to \$1,000,000
<u>0</u> \$1,000,000 and above	

13. If the proposed total goal of \$4,970,000 cannot be fully funded by a capital campaign, how would you feel if the parish were to assume prudent long-term debt to ensure completion of these proposed plans?

37 Acceptable 69 Undesirable, but acceptable 21 Unacceptable

I am not sure. Would it be mortgage/equity loans or bonds, or what?

Short-term only!

Based on a break-even performance, Trinity does not have cash flow from a significant debt.

Debt service would add another major expense line to the annual budget. It would expose Trinity to a major liability which would be risky due to uncertainties that continue to persist in the overall economy.

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

- 8 Make a gift to your parish through a bequest in your will.
- 1 Create a charitable gift annuity (minimum gift of \$5,000).
Benefits of a charitable gift annuity could include:
- receive guaranteed income for life (i.e. current rates of approximately 5.3% annually at age 65, approximately 6.3% annually at age 75)
 - receive an income tax deduction now for the gift portion
 - receive some tax-free income from the investment for life
 - possibly reduce applicable estate and inheritance taxes
 - enjoy the satisfaction that at the death of the final beneficiary, the principal would go to that part of the Episcopal Church you so designate
- 1 Donate appreciated real property such as a house, vacation home, farm or business property.
- 5 Send me the *Ministry of Gift Planning* brochure which explains Planned Giving options.
- 2 Add me to the Episcopal Church Foundation e-newsletter.

14a. 19 Trinity Episcopal Church is already in my will or estate plans.

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

 19 Yes 47 No 59 Not sure at this time

16. Among individuals you know, who would make ideal committee members for this proposed capital campaign?

Robert Barney	
Beverley Baxter	
Katherine Berger	
Walter Birge	4
Bill Burton	
Barbara Carvey	
Carolyn Coffin	2
George Dallas	2

Jim Demeritt	
Al Ehrenfried	
Patricia Fleischauer	
Buck Grace	2
June Grace	
Janet Hanschel	
Andrew Hawes	3
Betsy Higgins	
Rod Hossfeld	2
Nancy Huggins	
Jared Keyes	
Bob Krumme	2
Cubby Lauderdale	3
George Lauderdale	
John Lewis	2
Jay Luby	3
Catherine Mann	
Greta Morgan	3
Sally Myers	3
Jennifer Newbold	
Chuck Niessen	
Darrell Payson	
Bob Penfield	
Janine Penfield	2
Tom Phillips	
April Prewitt	
Brian Rosborough	3
Lucy Rosborough	3
Carol Sandel	2
Debbie Scarff	
Bill Smith	
Sandy Smith	
Stephanie Smith	
Mary Staniar	
Wade Staniar	
Ernie Steward	
Deborah Stoessel	2
Jim Stoessel	
John Stone	2
Martha Stone	4
Sue Tunnicliffe	
Henry Vailant	
Betty Vialle	
Margaret Wailes	
Libby Wilson	2

Anne Winslow 4
 Jim Wood 3

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

Comments:

We are a growing parish. (18)

There are many young families. (13)

There is a diversity of ages represented in this parish.

We have an excellent Sunday school. (2)

The Rev. Tony Buquor! (3)

We have great clergy leadership. (5)

Our clergy and staff are great. (3)

We have excellent staff leadership and momentum.

We have a lot of community activities.

In spite of the obvious need of the parish to expand, I hope the economic turmoil of the national debt is fully explored.

There is a palpable sense of vitality and renewal with the arrival of many new and younger families, along with tremendous loyalty of the old guard.

Trinity is a forward-looking place and I believe the older people are willing to help the church accommodate the needs of the younger, newer members.

There are select wealthy people in the parish who can easily fund this if it is sold properly.

To my thinking, the parish seems happier now than I can ever remember it being and the spiritual health seems to be solidly wonderful.

I think members have very strong ties to the parish and I think the desire to support Tony and Nick is significant.

The commitment of parishioners and longevity of many members is our positive. (3)

There are many families and young adults invested currently at Trinity who will see this capital campaign give back to them and the community in the future. Trinity is in a great town, great location, and offers its space to community non-profits and support groups like AA, etc.

The vitality of the parish community.

Factors in favor of the campaign are: 1) the clear and pressing need for the project; 2) the ever growing size of the membership, therefore the greater number of potential donors; 3) the huge opportunity the project gives us to get more efficient heating, water, lighting, 'green' systems/materials into our buildings and thereby have less of an impact on the planet and save money both short and long term; and 4) Tony's ability to reach our hearts when he speaks about the need for this project and for us all to participate.

Nick Morris-Kliment and our lay leadership are positives.

We have strong faith. (3)

This is a hopeful and caring community.

There is a need for more safe, healthy, usable space.

There is a sound financial foundation and energy surrounding this campaign.

There is recognition of the need and enthusiasm for moving forward even in difficult times. (2)

Our positive is the strength, commitment, and involvement of parishioners in the church.

This is a relatively affluent community. (2)

Tony is very well-liked. The church school program is attracting new families. The music program is very good for a parish that doesn't hire professionals.

The parish is a strong community of faithful and enthusiastic people. We have supported reasonable building programs in the past and we will again. The important thing is to keep us informed. This survey is a very good beginning - supplementary to the mock-up of the proposed building.

We have a growing church school and an influx of younger families, alongside committed long-time members.

It is a healthy, happy parish; it is a great environment.

I see growth especially with our children for church school and other activities during the week. There are also needs for adults programs. The choir really needs better "dry!" facilities and I'm sure other groups are feeling the pinch.

We have a skilled rector and many, many talented and motivated parishioners. Trinity has the momentum of growth in its favor, and the leadership to harness it.

The commitment to Trinity's future and to the children of the parish is awesome.

The need is great and clear. (4)

We have an excellent Sunday school for kids, Tony and Nick are great leaders, and this is a loyal congregation.

There is renewed energy and engagement here.

The parish is very strong and the liturgies and programs are very well run. The parish is very attractive and its liturgies and programs are very appealing.

Tony's leadership and his ability to speak to people's hearts about the need for everyone to participate in this.

We desperately need to make changes.

The vibrancy of the parish, with energy from new people, along with a sense that we are in a good place, ready to do something, and that we are strong and growing.

The parish will thrive with this new facility.

There are a lot of wealthy parishioners, and this is a highly educated parish.

This is a positive, vibrant community that truly cares about this project.

We have a robust parish life and a good number of parishioners with the means to support the campaign.

There is a need for more space.

We have good annual giving.

We have excellent programs and services.

We have increased youth and programs.

Increased church activities imply there are more parishioners today who could be prompted to contribute.

Many people are involved in other activities that are part of the church community.

We have many friendships here.

This is a caring community.

The Caring Connection had been particularly helpful.

Improved parking!

Trinity believes in the worth of preparing for the future and takes pride in responding to the challenges of growth. I am sure the parish will be enthusiastic at the opportunity here.

There is devotion to this church.

The fact that the church school has skyrocketed in the past four years means that we are bringing new people, particularly young families, for whom a facilities upgrade would be a logical step to capture/retain new congregants and possibly garner more parishioners.

This will give us the ability to grow the congregation and better serve the needs of the community.

Trinity is a central part of the surrounding community and this will only increase that.

The energy and devotion of parishioners is a positive.

Another attractive, large space would be available for rental use by other groups in town, providing us some income.

There is a great desire among the parishioners to do this.

A 76% growth in Sunday school (from 30 to 300 registered children) demonstrates significant parish vitality, as does 240 attendance at two services on an average Sunday.

The parish has a good “buzz” about it.

The growth of the church school and its leadership are positives.

We have many young families that have become active in worship and in programs.

We have a wonderful source of talented, creative and caring parishioners who have made Trinity their church home.

This has been a thoughtful planning process.

We have talented priests, a dedicated vestry, an active parish, and a splendid choir and music program.

The Campaign Committee is enthusiastic and hard working.

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

Comments:

Not reaching the goal in a timely manner. (2)

Financial/lack of funds. (5)

Donor fatigue! (2)

It is a mighty big project. (2)

The economy! (14)

Raising the money! (11)

Too much debt!

These kinds of projects always go over budget. (2)

There seems to be a relatively young parish in place and I don't know how many would be committed to major giving.

Neighbors could cause problems, there is not enough parking and people don't want this to go forward until parking is resolved, and older parishioners might not want change.

For many of us getting older, the 2008 crash was frightening. I look at the economy and see only higher taxes and health care costs and a continuing poor job market ahead. It's a scary time to think of taking on debt (i.e., the church taking on debt to fund this project). I am sorry to sound pessimistic. I know for myself that I need to watch my expenses more carefully. I know how very hard folks in the church have worked to come up with a thoughtful plan, but is there any way it can be done a little less grandly and thus less expensively?

We have never raised this much money before.

Folks in this community are struggling with their total income.

How comfortable are members financially?

Money going into this project instead of into ministry is a problem.

The organ is an ongoing concern and may get inserted into this demand for money. The communication for true needs should be sold across the parish...this can't be an option, but a real need.

Keeping the campaign focused will be difficult, but a key to its success. Trinity 2000 failed because it was too scattershot and broadly targeted. This ended up in everyone feeling aggrieved, even those whose pet projects were "done" (at least in part). So, in spite of my disappointment that the project is not tackling the worship space issues, I can support the focus on the new parish hall construction.

Considering all the needs and working out a compromise that is acceptable by most and then getting pledges to cover the cost could be a problem.

None, if there are only optimistic realists on the committee.

How committed to this project are the new members? The goal is equal to about nine years of the current pledge level. Unless there are less than 10 members who are willing and able to meet one-half of the total, I don't think the goal is possible.

The River Street House.

It will be hard to do it without a couple of very generous guardian angels to pledge up-front BEFORE we go ahead much more!

The parish responds generously when there is a clear, widely accepted need, and there is a well-understood and accepted solution to that need. This campaign has neither. The steering committee did not take the time to let people wrestle, as a group, with the real needs. The solution came from that committee and the architects, not the entire parish. The process of discerning what the real needs are, and how to meet them, can be an extremely positive experience for a parish. The process that actually has been followed has deprived Trinity of that.

It will be hard to keep other fundraising projects going.

Unanimity being thwarted by the implacable resistance of a few, single issue parishioners is a problem.

I don't see the urgency of the need.

Convincing some parishioners that this ambitious step is necessary!

What are we going to do with the River Street house? The expanse looks great in the pictures but it is, in reality, going to be placed on a small amount of land.

Moving the River Street house is both a parish problem and a historic district issue.

Giving history in the parish is non-existent. This is the big unknown. Getting pledges that fund ongoing operating expenses is already a chore. How will we possibly swing \$4+ million smackers?

The economic climate, cost overruns (which happened last time I think), no improvements to the main sanctuary which will make some people not want to give to the campaign (“not doing the things I care about”), older members of the parish wanting things to stay the same, and those who believe that the church should avoid debt.

Convincing people to see the long-term benefit to the parish in the face of shorter-term economic challenges, the challenge of convincing people not to be penny-wise and pound-foolish in the face of a powerful frugal Yankee-ethos, and convincing people that God may, in fact, be happy for us to have a beautiful, inviting, hospitable, spacious facility and that it's ok to spend money on it.

You will need to convince people that our ministry to the world in Christ's name may actually be strengthened by attending to this aspect of internal community life.

Affordability and town approvals could be problems.

The main, obvious problem is convincing parishioners to donate enough money for the project. I think people will certainly be willing to donate, but given the state of the economy, even financially comfortable people are feeling very squeezed.

It's a lot of money! There may be many people who are unable to contribute as much as they would like. I sincerely hope there won't be any ongoing disagreements about the plans.

A lot of the monies seem to be old money that is held closely.

Is the cost estimate realistic, given that there's no final design yet? I'm concerned that the proposed space might not be large enough for the future, given how fast Trinity is growing. Should there be an upstairs second floor above the main level?

It is a recovering economy, so I am not sure the timing is right. I worry we would not meet the goal amount and I worry we would go over budget.

Historic District Committee approval for the plans, immediate neighborhood support/protest, the status of the River Street House, hazardous waste removal for the oil tank under the River Street parking lot, and appropriate decisions regarding the selection of contractors/subs (common to any major building project) could be problems.

Although the parish has been growing in recent years, our concern is that newer congregants are not significantly "invested" in the church yet. The difficulty the church has had in meeting its annual pledges recently (resulting in being without a church school director for a year and sacrificing many other projects around the facility) is of concern.

The continued economic mess which is impacting many of us with rising prices and income that stays pretty constant. Obviously the town is going to raise something and it will be taxes (whatever they call it).

Getting commitment of funds in this economy.

I fear putting the church into deep debt.

I would not do this project until the economy improves.

Continuing operation during construction could be a problem.

Will this impact annual giving/stewardship? (2)

Neighbor input is important. Will we have problems with the Historic District Committee?

Parking! How do we reconcile an increase in capacity with no increase for parking? Also, the aging population needs more handicap parking.

This is a proposal taken too far by a small group at the church. Average weekly attendance is only fair and there is plenty of room. There is too much emphasis on the needs of Trinity rather than actual charitable needs.

There may be hidden/unexpected costs.

When you repair one room, it just makes the others look bad, so you end up painting them as well. This project could balloon.

This question can only be answered after demographic data for the parish has been studied and compared with data from other U.S. parishes which have recently launched or completed capital campaigns in the current problematic economic climate.

Do the young, newcomer families (whose children have increased church enrollment) have sufficient disposable income to contribute to both a capital campaign and annual giving?

What percentage of the parish population are retirees on limited fixed incomes or soon-to-retire baby boomers? This segment of the parish may have difficulty maintaining current annual giving AND contributing to a capital campaign. For some, it will be a zero sum situation which may result in lower annual giving because dollars have been reallocated from annual pledges to capital gifts. In addition, some recent retirees and soon-to-retire baby boomers may well be reassessing whether they can even afford to remain in the greater Concord area after transitioning to a reduced retirement income. Regardless of the level of participation of this age cohort in the proposed capital campaign, their future annual pledge dollars may be reduced due to smaller post-retirement incomes and will need to be gradually replaced by annual pledges from newcomers to the parish.

Suffice it to say, the intersection of demographic issues with a wide spectrum of income levels is quite complex and highly variable from household to household within the parish population.

19. What added ideas or suggestions do you have which might be helpful to the leadership in making this important decision?

Comments:

We don't want to hold Trinity back, but we don't see a strong need for such a massive campaign. In this day and age, we feel people's contributions can be put to more charitable uses or for a simpler/greener renovation to the existing space.

Forget the whole thing and take care of what really needs to be done to keep the church in good working condition.

We need frequent communication.

We might need help and cooperation from other institutions.

Consider the possibility of two-stage development over a five to eight year period.

The fundraising we did for Trinity's cookbook was most successful when we reached out to the greater Concord community. Possibly there are ways to engage groups or units beyond the parish who might have an interest in supporting us. Likewise, I wonder if other churches dealing with this might have ideas or support to share.

I have been at Trinity for 30 years. There is no need for more space and the current economic climate makes this proposal quite frivolous. I would be in favor of an interior facelift (paint, rugs, furniture) but that is all.

A targeted campaign with a specific purpose that speaks to a great need could be successful. The biggest help to success seems to be parishioners who are well-off being willing to make significant leadership gifts, and older parishioners (who are also well-off) being committed to planned giving, especially of charitable gift annuities. In addition, the use of a long-term bond is a wonderful arrangement that is working well for at least two institutions we are personally involved with and should definitely be explored as an option to ensure the successful completion of the campaign.

The needs are clear, the plan thoughtfully pursued, and the people involved to date are without question dedicated and trustworthy. All these good things aside, it is still very difficult to mount a successful campaign without a significant amount accumulated in a quiet phase. The fact that Trinity has been around for over 125 years, leaving its mark in the hearts of generations of Concordians (and others) should be a source of strength in terms of attracting potential donors.

The economic climate is still so uncertain, however, that assuming a long-term debt should definitely be considered, but only if it funds half or less than half of the project. Finally, one can wrestle this way and that for an indefinite period, waiting for the time/conditions/personnel, etc. to be "right". The true measure of any successful campaign we have been involved with seems to be the willingness of key leaders to take incredible risks -- true "leaps of faith" -- with passion and a dogged persistence. The Headmaster of our children's school said very simply at the kick-off gala for the campaign, "Failure is not an option," and with God's grace, it will not be in our case either!

Thank you for allowing all parishioners to have input. May God guide you all in the work ahead.

Make the pledge period as long as possible because many of us can only give so much a year and the more years we have, the more you get.

It might be helpful to emphasize that the proposed project equals about five-years of the annual operating budget AND that the operating budget will be positively affected by savings in energy and repair bills over time.

We should build up the endowment before we start a new building. We should not assume debt. If we don't have the money, don't spend it.

Can we get help from the diocese?

I'm just a little uncomfortable about this huge outlay of money in the context of Jesus' teachings about material things.

Courage!

I will simply pray.

If there are not a handful of huge donors pre-identified through a quiet phase then I would not go forward.

Look for grant money, especially to meet codes.

The plan is a good one and the parish should move forward. But, there really has to be much more marketing. The whole parish really has to "pull in the traces" together to make this happen. Right now, despite the many efforts of the current team, having the plans, the scale model and so forth, the whole thing still seems sort of a stealth exercise to the majority of the parish. You must engage at least some of the "Sunday church is important to me and my family, but the rest of the week I'm too busy and I don't think about it" group.

We, as current parishioners, are responsible for the vitality of our church. We need to make sure our facilities don't hold us back.

If it begins to look like not enough money can be raised to pay for the project up front, a long-term debt does not (on its face) seem unwise. I don't know how much thought has been given to this option, so perhaps a full examination of it has already happened. If so, sharing that information (the pros and cons of long-term debt) with the parishioners would be helpful if the point is reached at which it becomes clear up-front money can't be raised.

The Arts Council, active for 20-plus years with monthly shows during the academic year and an all-parishioner's show during the summer, is part of the church ministry. To continue this ministry, we need favorable space and lighting.

The most successful campaign I was ever involved in raised three times the annual pledge rate. We were successful in getting the membership to do that and at the end of the three years most of the members maintained that level for their annual pledge. Is there a lesser project, like \$3 million possible?

Go outside the parish for support, such as foundations, etc., considering the outreach Trinity provides. Or solicit rich relatives of parishioners, such as grandparents who live in Florida.

Is it impossible to do some of the basic infrastructure up front and not do all of the finishing right away? How much would this really save short-term, and what would be the cost penalty for stretching all this out?

Enlist the brains of as many of these younger parishioners as possible! We need new blood!

Keep on doing what you are doing; you are doing just fine.

Ensure the vestry and all leaders "in the know" are speaking from the same script.

Get the mothers of the Sunday school deeply involved.

Let your light so shine among people.

My views may not represent those of the congregation but having lived through two prior capital campaigns and the purposes they served, I just don't view the project as essential right now. I particularly can't relate to the timing given the state of the economy.

PBS has a program where people go through their site to buy items and PBS gets a financial reward. Could Trinity do something similar?

It might be interesting to compare the money raised to build the present church in the 1960's in 2012 dollars. Was the membership base smaller or larger than now? I would also like to see the demographics then and now if known.

Consider the life of the church as a whole, especially considering ministry and spiritual needs.

It is not as though we are doing this to attract people, the people are already here! The problems outside will have to be addressed. We are building because we have grown. Trinity has made me a better person and I want that message to be spread.

The increased plant size is likely to increase annual operating expenses like HVAC, utility costs, maintenance, property and liability insurance, etc. What impact will the completion of this proposed capital plan have upon the current building budget expense lines in the annual operating budget?

The addition of new facilities will also probably increase the size of the parish population by attracting newcomers – “if you build it, they will come”. Will additional clergy or other staff members be needed in the future? A larger parish would, of course, be a welcome result of a successful capital project, but may also increase the personnel portion of the annual budget in future years. It would certainly increase budget lines for various supplies and services to support programs for a larger population.

How will the anticipated increased in various annual expenditure (which would be triggered by building a new parish house) be offset? Do the campaign planners confidently expect the parish size to increase due to the attraction of expanded and upgraded facilities? For example, how many new pledging units would be needed? What about parking constraints as an upper limit on future growth? What if parish size remains static? Will the new facilities be affordable if the parish size remains flat?

Thinking about the long-term annual budgetary consequences of building a new parish house facility brings us back to the troubling issue of less than robust short-term annual giving and what the effect will be on annual pledges during the next three fiscal years if a capital campaign is launched in the spring of 2011. How to balance the goals and priorities of two different simultaneous appeals during a time of ongoing economic uncertainty will provide a major leadership challenge for the clergy and vestry, the Campaign Committee, and the Stewardship Committee.

Section Four:

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

Results from 26 Personal Interviews and 139 Direct Mail / Online Responses **Total of 165 Responses**

Note: Not all respondents answered all questions.

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

 145 Yes 16 No

Ninety percent were aware that Trinity Episcopal Church is considering a capital campaign. This is a positive indication that the church leadership has prepared the ground for a major capital campaign.

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

 106 Aware 6 Not Aware 47 Aware of some of the needs

Sixty-seven percent of the respondents were aware of the capital needs of Trinity Episcopal Church. Another 30% were aware of some of the needs. Only 3% were not aware of the needs. This is an indication that the leadership has done a fine job of communication.

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

 101 Yes 9 No 46 Yes, but with some concerns

More than half, 65%, are in favor of the campaign, with another 30% in favor with some concerns. Another 5% are opposed to the campaign. This is a sign that the church community is willing to support a campaign.

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

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

	PRIORITY				
	High	Medium	Low	Opposed	Lack Information
a. New Parish House Facility	<u>109</u>	<u>31</u>	<u>7</u>	<u>5</u>	<u>2</u>
<i>Additional Considerations:</i>					
b. Maintenance Reserve for Future Needs	<u>83</u>	<u>57</u>	<u>8</u>	<u>3</u>	<u>4</u>
c. Granite Veneer Exterior to closely match Chapel Exterior	<u>25</u>	<u>51</u>	<u>57</u>	<u>14</u>	<u>6</u>
d. Air Conditioning throughout New Building	<u>58</u>	<u>51</u>	<u>39</u>	<u>6</u>	<u>3</u>
e. Site and Exterior Upgrades (includes increased allowances for lighting and landscaping)	<u>33</u>	<u>74</u>	<u>37</u>	<u>6</u>	<u>6</u>
f. Upgrade to General Interior Finish (includes increased allowances for carpeting, casework and ceilings)	<u>31</u>	<u>73</u>	<u>36</u>	<u>5</u>	<u>7</u>

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

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

The most popular receives the highest number of points.

a. New Parish House Facility

327 High Priority 62 Medium Priority 7 Low Priority

0 Lack Information -5 Opposed to Project

Total Points: **391**

b. Maintenance Reserve for Future Needs

249 High Priority 114 Medium Priority 8 Low Priority

0 Lack Information -3 Opposed to Project

Total Points: **368**

c. Granite Veneer Exterior to closely match Chapel Exterior

75 High Priority 102 Medium Priority 57 Low Priority

0 Lack Information -14 Opposed to Project

Total Points: **220**

d. Air Conditioning throughout New Building

174 High Priority 102 Medium Priority 39 Low Priority

0 Lack Information -6 Opposed to Project

Total Points: **309**

e. Site and Exterior Upgrades (includes increased allowances for lighting and landscaping)

99 High Priority 148 Medium Priority 37 Low Priority

0 Lack Information -6 Opposed to Project

Total Points: **278**

f. Upgrade to General Interior Finish (includes increased allowances for carpeting, casework and ceilings)

93 High Priority 146 Medium Priority 36 Low Priority

0 Lack Information -5 Opposed to Project

Total Points: **270**

RANKING BY POINTS:

New Parish House Facility	391
Maintenance Reserve for Future Needs	368
Air Conditioning throughout New Building	309
Site and Exterior Upgrades	278
Upgrade to General Interior Finish	270
Granite Veneer Exterior to closely match Chapel Exterior	220

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

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

A number of additional needs, most related to the main church building, were offered and should be read. Improved lighting in the main church was mentioned most often.

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

A few area campaigns were mentioned, but these should not affect the success of Trinity's campaign.

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

 1 Excellent 89 Good 61 Fair 7 Poor

Fifty-six percent of the respondents to this question believe the present economic climate is good, and 39% consider it fair. Four percent believe it to be poor, and one respondent rated it as excellent.

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

 76 Improving 72 Remaining the Same 8 Declining

Indications are that the local economy is improving, with 49% rating it as such. Another 46% believe it is remaining the same, and 5% believe it is declining. These responses express cautious economic optimism. When people feel the economy is good, they are more apt to make gifts.

9. Does a proposed solicitation period for pledges in the spring of 2011 seem appropriate to you?

79 Yes 19 No 61 No strong feeling

Fifty percent are in favor of the proposed timing. Another 38% expressed no strong feeling one way or another. Twelve percent were opposed to the campaign timing. This is an endorsement that a campaign could proceed as scheduled.

10. Do you think a goal of \$4,970,000 (as outlined in the proposed plans) can be raised in gifts and pledges?

28 Yes 19 No 112 Don't Know

Only 18% believe the goal can be attained, while the majority, 70%, have no opinion if it can be reached. Another 12% do not believe the goal can be attained. Normally, we like to see at least a majority believing the goal is feasible. Generally when less than half are confident about the projected goal, the proposed goal is usually too ambitious.

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

126 Yes 10 No 27 Not sure at this time

Seventy-seven percent would be willing at this early date to contribute to the campaign, while another 17% expressed that they are not sure at this time. Another 6% indicated a negative response. This is a positive response, and an indication that the campaign can proceed.

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

<u> 21 </u> \$500 or less	<u> 13 </u> \$500 to \$1,000
<u> 17 </u> \$1,000 to \$2,500	<u> 7 </u> \$2,500 to \$3,000
<u> 16 </u> \$3,000 to \$5,000	<u> 12 </u> \$5,000 to \$10,000
<u> 12 </u> \$10,000 to \$15,000	<u> 10 </u> \$15,000 to \$25,000
<u> 3 </u> \$25,000 to \$50,000	<u> 3 </u> \$50,000 to \$75,000
<u> 0 </u> \$75,000 to \$100,000	<u> 2 </u> \$100,000 to \$150,000
<u> 1 </u> \$150,000 to \$250,000	<u> 1 </u> \$250,000 to \$500,000
<u> 0 </u> \$500,000 to \$750,000	<u> 0 </u> \$750,000 to \$1,000,000
<u> 1 </u> \$1,000,000 and above	

**Typical Gifts Essential to the Success
of a \$4,970,000 Capital Campaign**

Size of Gift	# Needed	Gifts Indicated in Study*
\$1,000,000	1	1
\$750,000	1	0
\$500,000	1	1
\$250,000	2	1
\$150,000	2	2
\$100,000	3	0
\$75,000	5	3
\$50,000	6	3
\$25,000	8	10
\$15,000	10	12
\$10,000	15	12
\$5,000	20	16
\$3,000	25	7
\$2,500	30	17
\$1,000	45	13
\$500 and below	Many	21

*Using the high range estimate

Respondents projected donations ranging from a low of approximately \$2,272,000 to a high of \$3,092,000. (While not indicated in the chart above, not all gift amounts were given within a range as presented. Some were given as singular amounts, e.g., \$5,000, instead of \$3,000 to \$5,000. The high and low estimates have been adjusted accordingly.) These early estimates fall short of supporting \$4,970,000 as a primary goal.

13. If the proposed total goal of \$4,970,000 cannot be fully funded by a capital campaign, how would you feel if the parish were to assume prudent long-term debt to ensure completion of these proposed plans?

44 Acceptable 81 Undesirable, but acceptable 28 Unacceptable

Twenty-nine percent responded that it is acceptable to assume long-term debt; another 53% said it is undesirable, but acceptable. The remaining 18% responded that long-term debt is unacceptable.

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

11 Make a gift to your parish through a bequest in your will.

3 Create a charitable gift annuity (minimum gift of \$5,000).

Benefits of a charitable gift annuity could include:

- receive guaranteed income for life (i.e. current rates of approximately 5.3% annually at age 65, approximately 6.3% annually at age 75)
- receive an income tax deduction now for the gift portion
- receive some tax-free income from the investment for life
- possibly reduce applicable estate and inheritance taxes
- enjoy the satisfaction that at the death of the final beneficiary, the principal would go to that part of the Episcopal Church you so designate

1 Donate appreciated real property such as a house, vacation home, farm or business property.

7 Send me the *Ministry of Gift Planning* brochure which explains Planned Giving options.

2 Add me to the Episcopal Church Foundation e-newsletter.

14a. 28 Trinity Episcopal Church is already in my will or estate plans.

Twenty-eight individuals have already included the church in their estate plans. This is an excellent response. Several others have indicated they would welcome information. They will receive information confidentially from the Episcopal Church Foundation.

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

29 Yes 58 No 69 Not sure at this time

Nineteen percent would be willing at this early date to volunteer. Another 44% are not sure at this time and may be persuaded to participate as the campaign plans are formulated. This is a relatively good response at this stage in the process. It appears likely that an adequate number of workers would be attracted to the campaign.

16. Among individuals you know, who would make ideal committee members for this proposed capital campaign?

Colby Anderson	
John Anderson	
Sandra Anderson	
Robert Barney	
Beverley Baxter	2
Gordon Bell	
Jean Bell	
Katherine Berger	
Walter Birge	11
Bill Burton	
Barbara Carvey	
Carolyn Coffin	4
Sally Cross	
George Dallas	2
Jim Demeritt	
Scott Doig	
Al Ehrenfried	
Nancy Fitch	
Patricia Fleischauer	2
Sandra Folk	2
Jay Forrester	
Ken Goss	
Buck Grace	4
June Grace	3
Janet Hanschel	
Grace Hartnett	

Randy Hartnett	2
Andrew Hawes	6
Brenda Hawes	2
Betsy Higgins	
Donald Hile	
Susan Hile	
Rod Hossfeld	4
Nancy Huggins	
Leo Jesudian	2
Jared Keyes	2
Bob Krumme	3
Judy Krumme	
Cubby Lauderdale	3
George Lauderdale	
John Lewis	3
Claudia Liebesney	
Jay Luby	3
Cheryl Mandler	
John Mandler	
Catherine Mann	
Greta Morgan	6
Emily Moss	
Sally Myers	6
Jennifer Newbold	
Chuck Niessen	
Darrell Payson	
Bob Penfield	
Janine Penfield	2
Tom Phillips	2
April Prewitt	2
Marge Rafuse	
Brian Rosborough	4
Lucy Rosborough	4
Carol Sandel	2
Debbie Scarff	
Bill Smith	
Sandy Smith	
Stephanie Smith	
Mary Staniar	
Wade Stainiar	
Ernie Steward	
Deborah Stoessel	3
Jim Stoessel	2
John Stone	4
Martha Stone	7

Betsy Sutter
 Betsy Sweet
 Chris Todd
 Sue Tunnicliffe
 Jenny Ubaldino
 Marc Ubaldino
 Henry Vailant
 India Venkitachalan
 Betty Vialle
 Margaret Wailes
 Anne Wheeler
 Libby Wilson 4
 Anne Winslow 5
 Jim Wood 3
 Beverly Woodward
 John Woodward
 Betsy Yamron

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

Comments were many and varied. Some highlights include:

- Clergy leadership
- Growth / young families
- Friendly / welcoming atmosphere
- Commitment

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

Comments were many and varied. Some highlights include:

- The economy
- Raising the money
- Disruption during construction
- Parking issues

19. What added ideas or suggestions do you have which might be helpful to the leadership in making this important decision?

Comments were varied and thoughtful and should be read in their entirety.

Section Five:

Conclusions and Recommendations

Conclusions

Awareness of Need

A majority of respondents (90%) were aware that Trinity Episcopal Church is considering a possible campaign, and 96% were also aware of some or all of the proposed plans. Of course, not all the items received the same degree of support. Present awareness of need is a positive; however, each project should be studied and prioritized with consideration given to the degree of support and the resources available.

Interest in and Support for a Drive

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

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

Concerns

1. Approximately 18% of respondents feel the goal is reachable. Twelve percent feel it is too high. The remaining 70% had no opinion on whether this goal can be achieved. This is an indication that the proposed goal may be too high.
2. While an encouraging number of major gifts were identified, too few were reported at this early date to allow a goal of \$4.97 million to be fully embraced.

Influential Leadership

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

Gift Potential

Experience tells us we can take the average between the low estimate (\$2,272,000) and the high estimate (\$3,092,000) of the pre-campaign projections revealed in the Study and multiply by a factor of 1.5 when certain percentages and comments (such as revealed in this study) are attained. Thus the average, \$2,682,000, when multiplied by this factor (1.5) reveals a suggested goal of \$4,000,000. This recommendation is made factoring in the reality that additional gifts, not yet identified, will be forthcoming; hence the multiple of 1.5.

Planned Giving

A number of people requested planned giving information, and 28 indicated the church was already in their estate plans. This is very encouraging and suggests that such future gifts could be used to help build endowment or retire indebtedness.

Campaign Timing

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

Recommendations

Recommendation #1

The information revealed in this Study suggests that a capital campaign for a Primary Goal of \$4,000,000 is realistic and appropriate. This presupposes that an assertive campaign involving the entire constituency would be launched, and that the type of methodology used by the Episcopal Church Foundation would be followed.

Recognizing that immediate needs are greater than what is revealed in the Study, leadership may wish to consider \$4,000,000 as the “primary” goal and establish a larger “challenge” goal, which would encourage the congregation to stretch to longer pledges—five years rather than three years, for example.

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

Recommendation #2

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

Recommendation #3

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

Recommendation #4

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

Recommendation #5

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

Months 1-2	Determine campaign calendar and budget. Announce goal. Begin materials development (pledge cards, brochures, letterhead, etc.). Recruit and train campaign leadership and support committee chairs. Evaluate Advance Gift prospects.
Months 2-3	Continue to train leadership. Complete materials development. Begin Advance Gift solicitation. Contact planned giving prospects, if appropriate.
Months 3-4	Prepare for and launch the Congregational Gift division. Hold kick-off event. Begin personal solicitations and monitor solicitation efforts.
Months 4-5	Finalize all calls. Set up pledge collection and acknowledgment systems. Hold Celebration Event to acknowledge conclusion of the campaign and recognize the leadership and volunteers.

Recommendation #6

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

A Final Word

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

Thank you, and best wishes.

Section Six:

Appendix