

Trinity Episcopal Church

Feasibility study

EXECUTIVE SUMMARY

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Executive summary

For quite some time members of Trinity Excelsior have been discerning the possibility of capital improvements to address the need for air conditioning. With the pandemic, proper air ventilation and filtration became both an emergent and pressing need. In addition, as the parish was looking to expand its programmatic budget, the leadership saw the opportunity for increased cash flow if the remaining mortgage was paid. Finally, deferred maintenance on the stained glass windows resulted in an emerging need for these to be fixed as soon as possible.

While there had been informal conversation that there was financial capacity within the congregation, leadership determined it was time to proceed with a Feasibility Study to determine the level of support for a proposed campaign. Prudently, the leadership sought to have statistical results before undergoing a fundraising initiative. Trinity, Excelsior contracted with Vandersall Collective to complete a quantitative study. Rev. Mieke Vandersall and Erin Weber-Johnson were the primary consultants to provide services to determine the:

- level of communication of the proposed plans in the parish;
- level of support for moving forward with a capital campaign;
- level of engagement by the congregation with the projects and their perception of priority;
- realistic and feasible goals should a campaign move forward.

While preparing for the case statement, several additional projects were articulated by the leadership. It was recommended by Mieke and Erin, prior to Feasibility Study, that the Vestry determine a plan for addressing these projects and communicating this plan broadly to the parish. The Vestry took this recommendation under advisement.

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RESPONSE RATE

During the entirety of the Feasibility Study process, the parish's leadership demonstrated friendly, engaged, and open communication regarding the proposed campaign and project plans. A total of 64 households participated in the survey; 12 interviews were conducted, and 52 responded to mail questionnaires and the online survey.

All responses were cross-checked with both the church directory and 2021 annual giving records to ensure there were no duplicate entries either from an individual or a household.

This represents a high total response rate of 56.6% among the members of the church community that were contacted, which far exceeds the industry standard for range of validity. This assures us that we have heard from most of those who would consider making a gift and validates that Feasibility Study report's recommendations.

RESULTS

There are a number of indicators for proceeding with a capital campaign, following the completion of the study's recommendations. The Feasibility Study indicates a significant awareness of the need for a campaign and the capital projects proposed as well as an early willingness to give. Additionally there is a good amount of affirmation and support for the campaign itself, once concerns have been addressed.

The goal listed for the Feasibility Study was \$331,548. Vandersall Collective recommends an adjusted primary goal of \$214,752 based on gifts self-identified by participants and variables identified within the study.

There were four related concerns raised in the Feasibility Study that will need to be addressed by the parish's leadership prior to moving into the Solicitation Phase:

- Concern about other projects that require attention, especially the roof;
- Development of volunteers willing to participate;

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- A polarized response to paying off the mortgage; and
- Concern about the timing of the campaign following the annual giving campaign where Trinity Excelsior asked and received a 20% increase in pledges.

Given the support for a capital campaign, Vandersall Collective would love to recommend proceeding immediately, but we believe additional work is needed before proceeding. We recommend the following steps:

- Create a deferred maintenance plan with a transparent process for completing projects, especially the roof;
- Revise the projects to prioritize air conditioning and the repair of the stained glass windows with additional funding utilized for a maintenance fund;
- Create and implement a communications plan to both share and invite further feedback on the prioritized projects, the deferred maintenance plan timeline, and capital campaign expectations for the congregation;
- Organize a time of celebration and gratitude of annual giving inviters and volunteers before undergoing a campaign;
- Celebrate the completion of the annual goal and assure no immediate increases in the annual campaign in the next two years.