

VISITATION PARISH

Campaign Preparation Process Executive Summary



Steering Committee Findings and Recommendations to the Parish Council

Steering Committee Members

Pastors

Fr. Joseph Siegel

Fr. Chris Floss

Co-Chairs

Catherine DeBernardis

David Stevenson

Members

Betty Carr

Dario Del Fiacco

Don Hoffman

Debbie Johnson

Mike Ohm

Jackie Osterhaut

Joe Voss

Respectfully Submitted By:
LatzBruni Partners, LLC

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Executive Summary

Under the leadership of the Pastoral Council and Administration Commission, Visitation Parish hired LatzBruni Partners (LBP) in September of 2005 to facilitate a process that assessed Visitation Parish's readiness to engage in a capital campaign. Parish leadership initially wanted to test market a plan that increased space for both the church and school. Towards that end, a formal campaign preparation phase began September 7, 2005.

The campaign preparation process was designed to engage a sizeable number of parishioners to secure their perspective and insight into the needs of the parish for the future. Under the leadership of Fr. Siegel, a Campaign Prep Steering Committee was assembled in September 2005 made up of a cross section of parishioners. This group led the Campaign Preparation Process which focused on three key deliverables: a Case Statement Process and Report, Prospect Evaluation leading to a preliminary campaign goal, and Recommendations to the Pastoral Council for moving ahead with a potential initiative.

The purpose of this Executive Summary is to report the findings of this process in determining the foundation for a potential capital campaign for Visitation Parish. The findings included represent the reactions, insights and recommendations of over 500 parish members involved, through individual meetings, group planning sessions, and a survey instrument.

These recommendations have been put forth by LatzBruni Partners on behalf of the input from this large group of parishioners. For your reference, the entire Final Report on the Campaign Preparation Process can be found on the parish website at www.visitationparish.com.

Key Findings

- Overall, parishioners have very positive feelings about the parish and are devoted members. Quite clearly, most parishioners are supportive and admire both Fr. Siegel and Fr. Chris Floss. Both are respected and appreciated. Their presence at the school and on Sundays is seen as refreshing and welcomed.
- Visitation is seen by many parishioners as traditional, authentic and very spiritual. These characteristics are deeply valued by many.
- There is a strong devotion to the school across all ages, and many are proud of the generations that have attended the school.
- The Adoration Chapel was noted as a particularly significant strength.
- In addition, the members are regarded as warm, kind, and generous people. In general, parishioners are proud to be members of the parish and want to ensure that Visitation's future is going to be solid, proactive, reasonable, and inviting.

Recognizing the strengths listed above as being solid foundation for which members know and love the parish, additional key findings during this study include the following:

- Parishioners most involved with programs and ministries expressed repeated concern over the divide felt in the parish, best described as the "three islands". A disconnect felt between the school,

the church, and the parish operations was often expressed as the largest concern to address throughout both programmatic and capital change or growth.

- The less one was involved in parish programs and ministries, the less one felt and shared this disconnect.
- There was concern regarding the preliminary plan to address space issues at the church and school. Specifically, concern stemmed from a feeling that the plan did not include a master strategy for the entire campus as well as being decided upon by a small group of parish leaders. Many did not want to support a plan without considering the big picture for the entire Visitation campus.
- If possible, parishioners would prefer to maximize existing space but do understand some buildings very well may have outlived its usefulness, specifically, Madonna Hall.
- Parishioners involved in leadership positions have shared frustration over the lack of knowledge and confusion regarding the current state of all the buildings on the campus and their life expectancy. Specifically, many parishioners are unclear as to the future and full utilization of the convent. This ambiguity has created a sense of uneasiness when talking about building new facilities (i.e. "we are talking about building new and we have a great deal of unused space").
- In general, communications were seen as an issue, from new members not knowing about program options to veteran parishioners feeling uninformed. This lack of communication was especially voiced in regards to the finances of the parish and how some church decisions are made. A feeling of division was communicated because of this as well as some sense of distrust/division between some staff and volunteers.
- The parish has a rich history of leadership from former Pastors and is used to having long-term leadership. While challenges lie in Fr. Siegel still being quite new, his presence has been commended, yet the parish would benefit by his reaching out to more parishioners.

Based on these findings, LatzBruni Partners would not recommend Visitation Parish engage in a capital campaign. Despite this preparation phase being an inclusive process, there is not enough detail as to exactly what the project is for members to invest significant contributions. More work needs to be done to engage parishioners in understanding the true need, communicating an overall master plan for the campus and create a sense of ownership among parishioners. Currently, members *want* to support a project, but *only when* they understand the need and are presented with an overall master plan.

Capital Bold Steps Identified

Any master plan solidified by Visitation Parish should address the following goals and bold steps identified through the campaign preparation process. They include¹:

- **Ensure spiritual growth by providing meaningful ministries and high quality programs to parishioners of all ages, enabling them to feel welcome and providing opportunities to become active and involved members of Visitation Parish.**

¹ These goals are written in no particular order. All goals were discussed in detail and are weighted equally for the purposes of this document.

- **Enhancement and expansion of the parish facilities to include a gathering area and meeting space to meet the growing needs of ministries and programs.**
- **Ensure the infrastructure of the parish campus addresses the physical needs of all members, especially the senior and disabled parishioners. Parking, safety and accessibility were often noted as key issues.**
- **Continue to modernize and enhance the educational facilities to meet the needs of all Visitation students. This includes providing more space for the Day School, Religious Education, and Youth Ministry programs to improve efficiency and enable program growth.**
- **Separate the current parish operations from the living space for the Pastors and enhance the office efficiency in shifting this space.**

Program Bold Steps Identified

In addition to bold steps to address capital issues, parishioners were asked to brainstorm bold steps needed to address program related issues. These refer to any *activity* related to parish leadership, programs, ministries, liturgies, and administration that may or may not involve a significant, one-time capital investment. The areas most stressed were:

- **Recognize a divide between the school and Religious Education programs and brainstorm strategies to bring synergy and a connection between these two programs.**
- **Create and invest more in outreach and community service opportunities.**
- **Improve parish communications, especially related to the financial reporting and fiscal state of the parish and its accounts. Specifically, the status and use of the endowment fund was mentioned frequently by lay leaders of the parish.**
- **Enhance the process for welcoming and engaging new members.**
- **Make better use of the website across all areas including the church, school, and specific programs.**
- **Grow the selection and quality of programs and increase participation.**

Willingness to Support

Many parishioners have shared through one-on-one interviews and group sessions that their support will be very high, when they understand exactly what they are being asked to support. They want to see good communication and transparency throughout the process as well. Additionally, many want to see some accountability of how the money raised is spent and a clear outline of what is to be done and in what order (phasing a master plan is preferred). Some of these concerns stem from questions regarding the Vision 2000 initiative. It is important to note, overall, parishioners feel good about the projects completed through Vision 2000. Questions and concerns offered were related to the allocation of funds raised through the initiative as well as the recognition and acknowledgement process.

When asked, "Is the Parish ready for another campaign?" The answer to this question is mixed. Most feel it is contingent on how well the parish can answer the question, "what do we currently have that we can use, what has outlived its life span and what do we truly need to advance Visitation?" Parishioners need to "see the campaign justified" and if so, then, yes, they are ready. Again, there is a direct correlation with those most involved with Visitation as being the ones most likely to recognize the need and have a greater propensity to support an initiative at this time.

Prospect Evaluation Process

An important component of the Case Statement Process included addressing the question, "How much can Visitation Parish raise?" To effectively address this question, church leaders, volunteers, staff and LatzBruni Partners representatives looked closely at the perceived capacity (ability) and propensity (likelihood) of the Visitation Parish constituency to enter into a multi-million dollar capital initiative.

The result of this process was the determination that Visitation Parish **could receive in financial contributions approximately 4.0 to 5.0 million dollars in financial contributions over the course of five years²**. However it is critical to note, as previously stated, that only through an inclusive process in which parishioners understand the need and are presented with an overall master plan could this financial goal be attained.

RECOMMENDATIONS

Although LatzBruni Partners believes that Visitation Parish is in a position to raise approximately \$4.0-\$5.0 million over the next five years, **it is critical that the parish focus on further preparations prior to kicking off a campaign**. This strategic effort to better position the campaign is imperative to accomplish the monetary goal of raising \$4.0 - \$5.0 million.

Recommendation #1: (Timeline: within the next 6-8 weeks)

Share the results of the Preparation Phase immediately by aggressively marketing the findings. This includes reconvening or directly communicating with all parishioners that participated in the preparation phase to share the findings and not lose momentum.

Whether through an individual conversation or more efficiently, by utilizing a group setting and/or "thank you" event, aggressively invite and share the results with all the households that participated in the interviews, group planning sessions, or written surveys. This would allow Fr. Siegel and Fr. Chris to thank those involved with the process and continue the cultivation and education process. The following steps are recommended:

- A) Present Executive Summary to the Administration Commission and School Board (in one shared meeting).

² It is important to note that the current disconnect felt from some Parishioners with the current needs of the Parish was considered during deliberations. These totals reflect an investment of a few months prior to kicking off the campaign to educate and cultivate these donors.

B) Plan an event in which everyone that participated may attend including everyone that was part of an interview, group planning session or filled out a survey. A unique invitation should be mailed out to these specific families. The agenda would include thanking everyone for their participation, share the findings and ask for feedback and questions.

C) Insert a short message in the Bulletin:

- o Thanking everyone that participated, along with the names of everyone that participated
- o The message to watch your mailbox for a printed copy of the findings
- o A message addressing the future steps of this effort

D) Pastors and/or leadership deliver a succinct presentation of the results of the study to Parish Groups during already planned events (look for captive audience opportunities for a 15 minute presentation, the findings should not be the destination but an add-on to a program). Groups may include:

- o CCW
- o Choir
- o RE
- o School
- o Father's Club
- o Other groups?

E) Communicate the Executive Summary findings to entire parish utilizing a Sunday to deliver messages from the pulpit and during Mass, as well as mail the printed summary with cover letter from Father Siegel:

- a. During Mass communicate the purpose of effort, share the decision of next steps, provide a timeline, thank everyone for their participation, interest and support as well as solicit ideas and questions. These messages could be delivered just before or right after the all parish mailing of the Executive Summary.
- b. Graphic designer to create on 4 fold special printed piece
- c. Letter printed on letterhead enclosed separate from printed piece
- d. References full report on the website – post on website

Recommendation #2:

(Timeline: ongoing until the campaign begins)

Before a campaign should commence, aggressively cultivate those identified during the preparation process to grow interest and especially to engage those not involved to date. This would be best done by Fr. Siegel personally reaching out to such families. This step would build relationships, cultivate donors, and help address the distance between the administration and the parishioners that many have expressed.

Recommendation #3
(Timeline: Post 6-8 week communication phase
and ongoing until the campaign begins)

Through the use of “pastor briefings” and other interactive strategies, it is recommended that Visitation Parish continue to cultivate potential leadership for a funding effort as well as begin developing the outline for marketing materials.

Recommendation #4
(Timeline: immediately)

The Parish should complete a comprehensive review of every building on the campus and share those assessment findings with the parish.

Recommendation #5
(Timeline: immediately)

The Building Task Force should move forward in developing a master plan. If possible, Visitation should consider adding a few of the existing Steering Committee members to the Building Task Force for continuity and continued cultivation.

IN CONCLUSION

Parishioners have expressed a strong desire for Fr. Siegel to take a strong leadership role in this campaign. Members have communicated that his guidance and direction are among the most important factor in believing that the priorities are sought after and worthy of investments. Members want to see him continue to reach out to the parish, they want to hear what is being planned, and they want to work collaboratively to come up with a vision for the parish they deeply love. For this effort to be successful, Fr. Siegel must be behind such an effort 100% and is willing to communicate his passion and belief in the program.

It is recommended that the Building Task Force outlines the building plans for the future and clearly communicate those plans to the entire Parish when implementing the strategies named above. LatzBruni Partners estimates the earliest Visitation Parish would be ready to maximize the potential goal of \$4.0 - \$5.0 million while not losing momentum would be late summer/fall of 2006.

It is our hope that these findings and recommendations will provide a clear direction for the Pastoral Council as it leads Visitation Parish into the future. LatzBruni Partners looks forward to continuing to collaborate with Visitation over the next few months in preparation of a capital campaign.