

ST. ANDREW PARISH

FEASIBILITY STUDY

Final Report

APRIL 26, 2022

CCS
FUNDRAISING

75
YEARS

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THANK YOU & ACKNOWLEDGEMENTS

CCS is pleased to present this Feasibility Study Final Report to St. Andrew Parish and its leadership. This report captures the aggregated findings of 25 personal interviews with 33 individuals and 100 e-survey responses. We would like to express our sincere appreciation and gratitude for all those involved in the study. CCS is honored to be on this journey with you, and we wish to acknowledge the following leaders:

- REV. SERGIO ROMO, PASTOR
- JULIE RICHARDS, FUNDRAISING & DEVELOPMENT
- ALLEN ACKERMANN, PRINCIPAL
- SARAH CASAVECHIA, VICE PRINCIPAL

As a team, your leadership helped to establish the vision for this potential campaign and encouraged participation throughout the community to provide thoughtful and candid feedback. A resounding theme heard throughout the study was the families' unwavering commitment to St. Andrew School. As such, we thank you for your contribution to this effort and for your passion to see the school continue to thrive.

Sincerely,
The CCS Team

Doug London, Executive Vice President
Andrea L. Essling, Senior Vice President
Elizabeth Long Edwards, Director

THANK YOU & ACKNOWLEDGEMENTS

In total, eighty-two individuals (40 couples) were invited to participate in a personal interview. As of April 19, 2022, 25 strategic conversations with 33 individuals were completed, surpassing our initial goal of conducting 10-15 strategic interviews. We would like to express our sincere appreciation and gratitude for all who participated in an interview for providing us candid and robust feedback on the projects, timing, and scope of the proposed plan.

INTERVIEW PARTICIPANTS

1. ALLEN ACKERMANN
2. ARJUNA ARIATHURAI
3. JENNIFER & SHAWN BABIARZ
4. DAN BANSLEY
5. SCOTT BURNS
6. SARAH CASAVECHIA
7. MELISSA & JOHN CHALUS
8. LYNNE CHRISTOPHER
9. JACLYN & PAUL EGGER
10. ASHLEY GAUNTLETT
11. SARA GEOGHEGAN
12. NATALIE & DANIEL IANNESSA
13. MARIA KENNEDY
14. MARGARET LAWLER
15. JIM LLOYD
16. STEPHANIE LYONS & JOHN LYONS
17. MISSI MANNION
18. STEPHANIE & STEPHEN MEWBORN
19. MAGGIE & PATRICK MURPHY
20. ADRIENNE & DANIEL ORR
21. JANEL PALM
22. LAURIE SILVA-REGAN
23. LIZ VINCENT
24. PATRICIA OFFER & PHIL ZEPEDA

STUDY PURPOSE & METHODOLOGY

In March 2022, CCS launched a campaign planning study in partnership with St. Andrew Parish to address the following:

1. Potential of fully realizing the previous capital campaign, *To Teach Who Christ Is*, in alignment with the Archdiocese of Chicago.
2. Evaluation of an achievable increased campaign goal.
3. Exploration of additional opportunities to fund the school.

The campaign planning study tested \$2.9M, \$4.8M, and \$6.8M capital campaigns with the following case elements:

- Honor the trust and role that the parents of our students have given us to educate and spiritually steward their children.
- Move the learning space for the ECC out of its temporary location to a space within the main campus.
- Encourage engagement across grade levels with programming that benefits from having students in a single location.
- Increase safety and reduce the distance that ECC students need to travel for use of main campus amenities.
- Allow learning to thrive in spaces that are constructed and designed with that purpose in mind.
- Offer the space to maintain and grow our current enrollment at Saint Andrew School.

1

1 STUDY PREPARATION

Data collection, study materials development, interview candidate identification and invitation

2

2 ORGANIZATIONAL SCAN

Analyzed the last five years of offertory, school, and campaign giving history to understand strengths, challenges, and opportunities for growth

3

3 STRATEGIC INTERVIEWS

Conducted 25 strategic interviews with School staff, parishioners, and school parents

4

4 ELECTRONIC SURVEY

Sent e-survey link to 1247 individuals and received 100 responses and 70 gift indications

5

5 DATA ANALYSIS & REPORTING

Data analysis, report on findings, and recommendations

EXECUTIVE SUMMARY

This following report reflects the results of 25 interviews as well as responses from 100 e-surveys. Below is an aggregation of the core findings.

CASE

- 34% of interviewees and 27% of e-survey respondents had a “Mixed” response to the campaign plans
- Infrastructure repairs and outdoor space were identified as the school’s highest needs
- Most cited request was for further clarity and detail on projects and context for what happened with the previous campaign

LEADERSHIP

- 18% of interviewees indicated that they would serve in either a leadership capacity or on a campaign committee
- 9% of e-survey respondents would consider participating in a leadership role and 14% would consider serving on a committee
- Interviewees stressed the need for Fr. Romo to have a heightened presence at the school and to communicate the vision and enthusiasm for a campaign in partnership with school leadership

PROSPECTS

- 57% of interviewees stated they would give a gift to the campaign
- 43% of e-survey respondents indicated they would give a gift
- 5 interviewees self-indicated gifts during the interview process totaling \$146,000
- Self-indicated gifts during the e-survey (70) indicated a total of \$441,000+

PLAN

- Only 36% of interviewees and 32% of e-survey respondents felt that a goal of \$2.9 million was realistic
- 61% of interviewees and 52% of e-survey respondents indicated that now is the right time for St. Andrew parish to move forward with a campaign



Section 2:

STUDY INTERVIEW RESULTS

INTERVIEW DEMOGRAPHICS & PERCEPTIONS

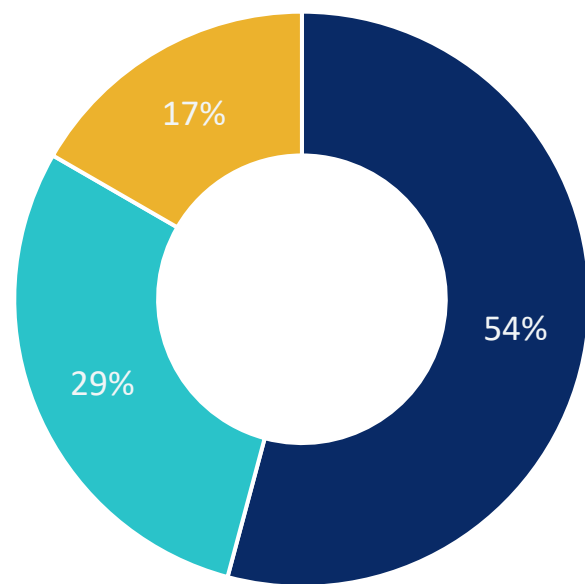
In total, 25 strategic interviews with 33 individuals were conducted. Their core demographics and perceptions of St. Andrew are listed below.

- Fifty-four percent (54%) of all interviewees have been affiliated with the church for over 11 years.
- Forty-three percent (43%) of interviewees identified as school parents and thirty-two percent (32%) identified as parishioners. An additional twenty percent (20%) identified as a volunteer (school board, finance committee, previous campaign, or facilities and construction committee). Five percent (5%) identified as parish or school staff. *Individuals may belong in multiple categories.*

NUMBER OF YEARS AFFILIATED WITH ST. ANDREW



PERCEPTIONS OF THE PARISH/SCHOOL



Recent CCS studies show an average of 61% "Very Positive" and 29% "Positive" responses to this question.

- Very Positive
- Positive
- Mixed

INVOLVEMENT AT THE CHURCH

SCHOOL PARENT



PARISHIONER



VOLUNTEER



PARISH OR SCHOOL STAFF

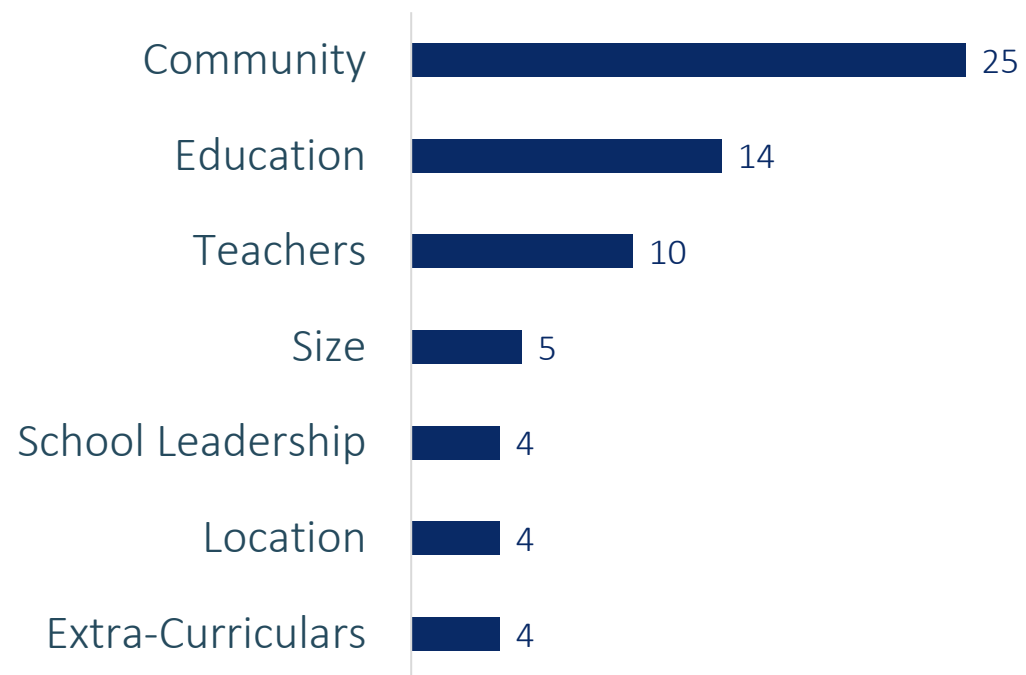


"We love the St. Andrew School community."

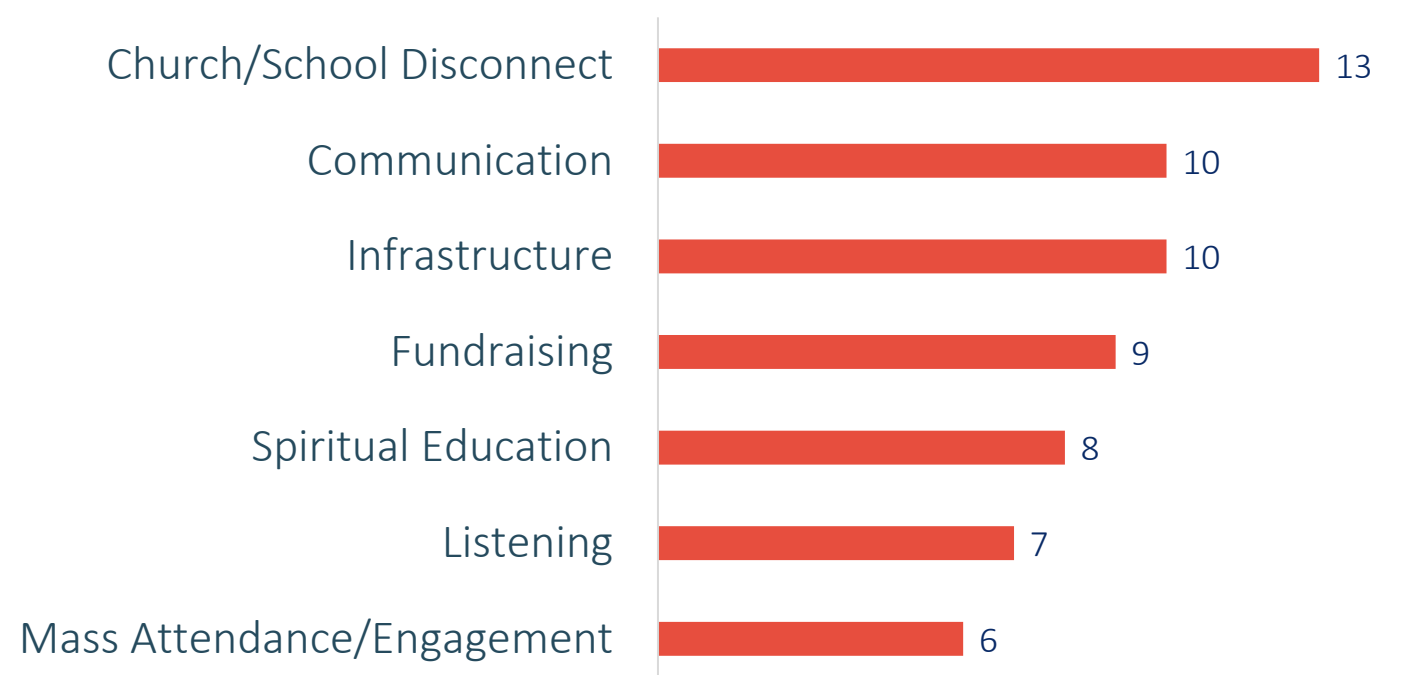
STRENGTHS & AREAS FOR GROWTH

Eighty-three (83%) of interviewees have expressed a “Very Positive” or “Positive” perception of the parish and school. This positive response is encouraging for a potential major fundraising effort. Overall, interviewees emphasized more of the school’s strengths and challenges than the church, but both represent helpful feedback to guide future fundraising and messaging. The graphs below indicate the number of mentions each strength and area of growth was mentioned.

STRENGTHS



CHALLENGES & OPPORTUNITIES TO CONSIDER



- *“The school community binds us to the city.”*
- *“Our daughter is excited about learning.”*
- *“Our kids are becoming good humans.”*
- *“The teachers are amazing.”*
- *“Small class size allows for individualized learning.”*



- *“There is a physical and mental disconnect between the school and the church.”*
- *“There’s no continuity or transparency in messaging.”*
- *“The school facilities are deteriorated.”*
- *“There are too many asks.”*
- *“The spiritual connection is lacking.”*

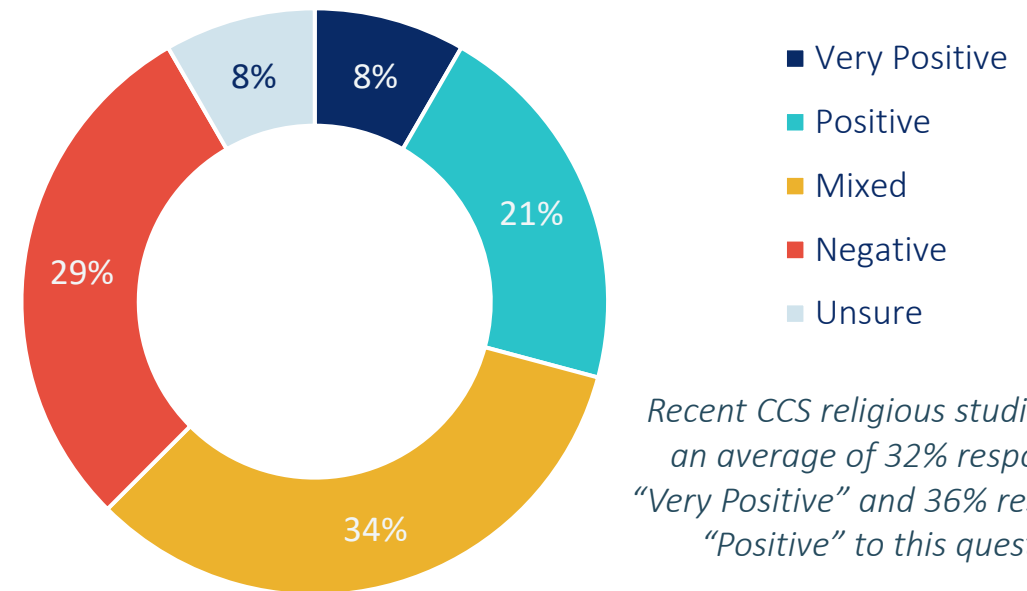
CAMPAIGN PRIORITIES

For interviewees, 37% had some familiarity with the proposed campaign plans while 33% had little to no familiarity. The remaining 29% were very familiar with the plans. By and large, respondents have a mixed or negative view of the case elements with 34% having a “Mixed” and 29% having a “Negative” view of the proposed plan. Interviewees who had a mixed or negative reaction noted the following concerns: different school needs, transparency, communication, and goal size.



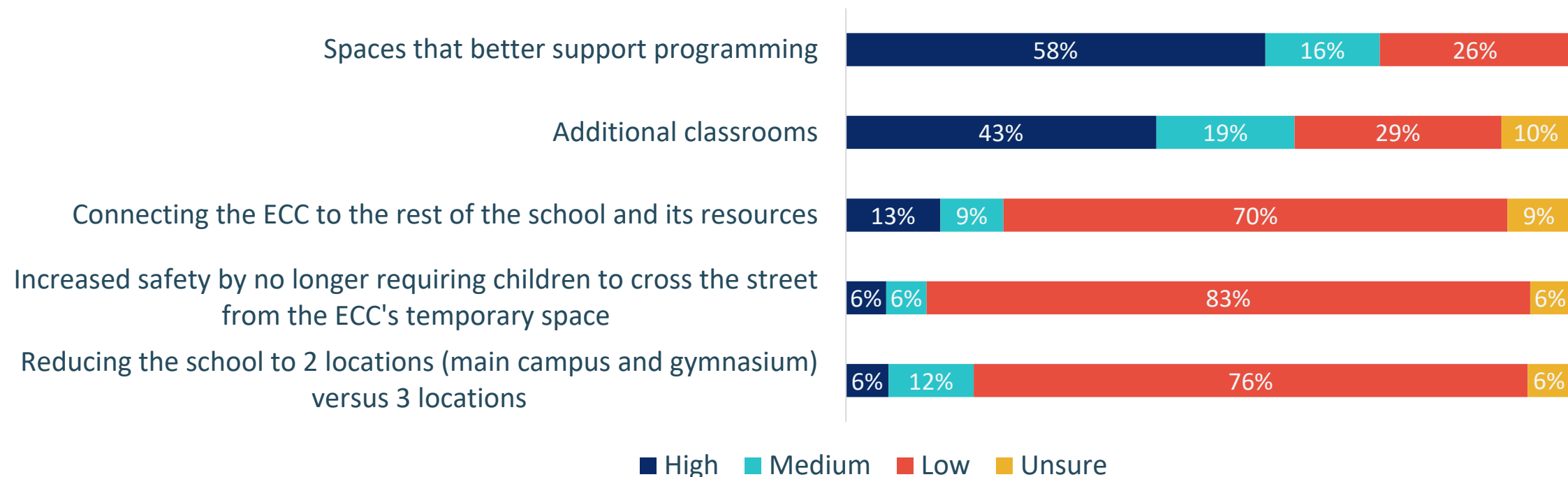
“What is the best financial and emotional decision for everybody?”

WHAT IS YOUR OVERALL REACTION TO THESE PLANS?



Recent CCS religious studies show an average of 32% responding “Very Positive” and 36% responding “Positive” to this question.

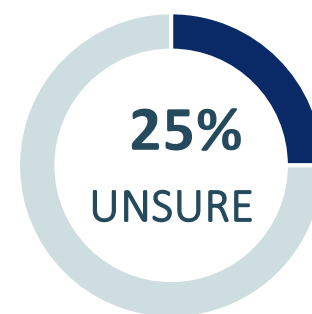
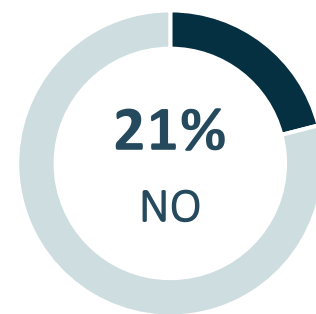
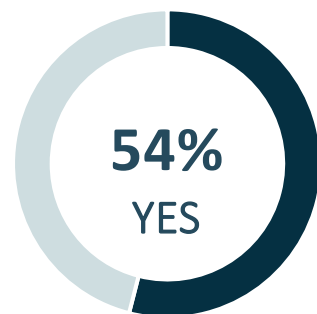
When asked to prioritize campaign projects, **all (100%)** of interviewees identified infrastructure updates to the main school building and creating green space as higher priority needs than those tested in the background statement. Among projects outlined in the background statement, this is how interviewees responded:



REACTION TO TIMING & GOAL SIZE

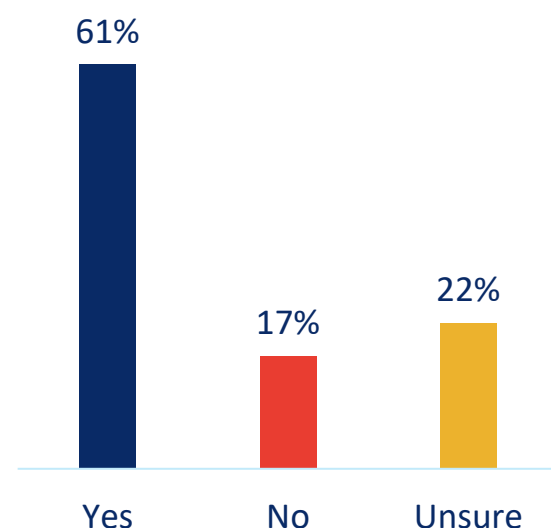
- There is uncertainty around the financial goal among interviewees, with 36% (9 interviewees) responding “Yes” when asked if \$2.9M is a realistic goal, 12% (3 interviewees) responding “Yes” when asked if \$4.8M is a realistic goal, and 4% (one interviewee) responding “Yes” when asked if \$6.8M is a realistic goal. These responses fall below the CCS benchmark of 39%. For those who offered further comment, many noted these goals would be more appropriate for a campaign with different priorities and have concerns about the success of a campaign as currently planned. When asked to recommend an alternative goal for the current plan, responses ranged from \$500K - \$4M. While noteworthy, this is one of a series of factors that inform the final recommendations.
- Significantly, 61% of participants confirmed that St. Andrew should move forward with a campaign at this time and 22% responded “Unsure” regarding timing. Many who indicated “Yes” added that the campaign priorities should be different, though. When compared against CCS’s benchmark of 75%, we can see that many within St. Andrew community are hopeful about the current environment and prospect of change.

IN YOUR OPINION, ARE \$2.9M, \$4.8M, OR \$6.8M REALISTIC GOALS?



This data includes those who indicated the goal would be reasonable for a campaign with different priorities.

IS NOW THE RIGHT TIME FOR A ST. ANDREW CAMPAIGN?



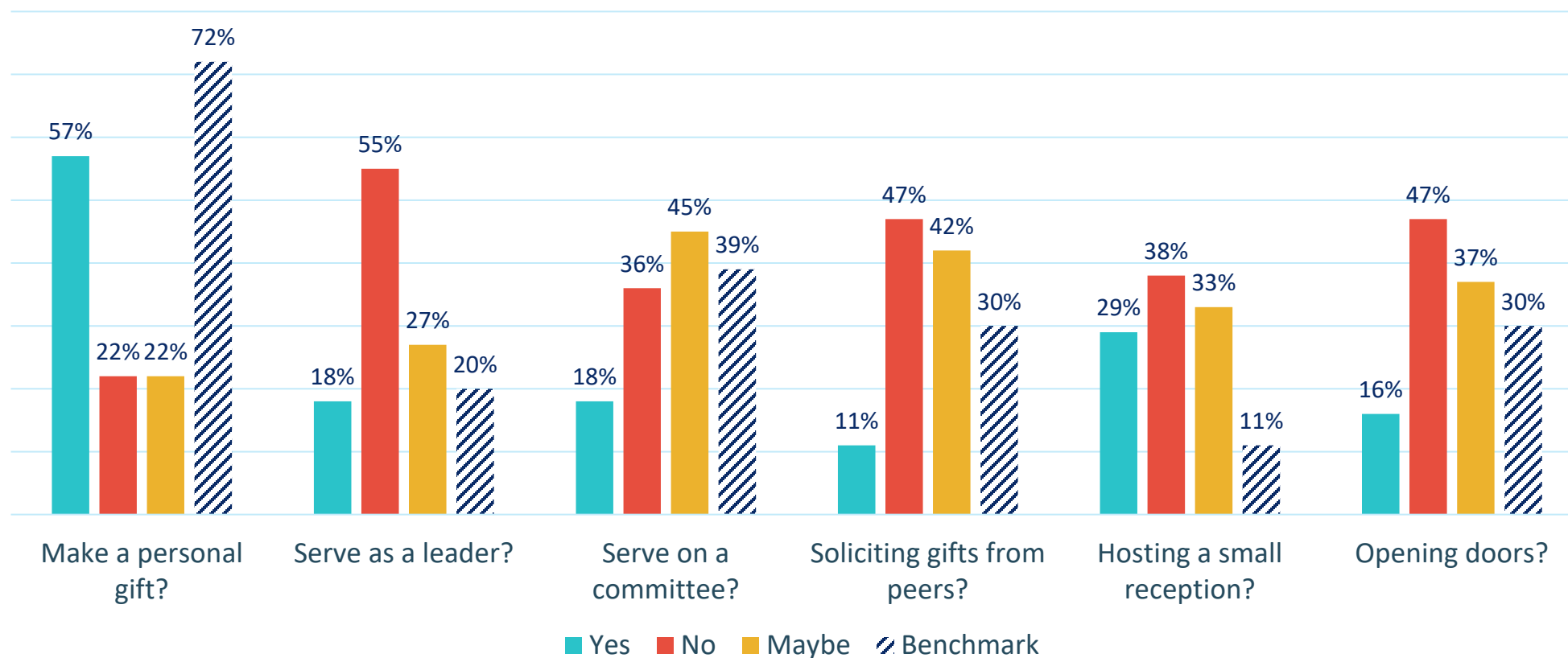
“I’m concerned about the goal of this campaign because the last one wasn’t achieved.”

“If the plan prioritized green space, infrastructure updates, and a STEM lab, it would excite and rejuvenate parents.”

LEADERSHIP POTENTIAL

- Seventy-nine (79%) of interviewees responded “Yes” or “Maybe” to considering a gift to a St. Andrew campaign. Aligning this willingness with a compelling message, clarity on the proposed plan, and thoughtful engagement will allow St. Andrew to unlock additional giving potential.
- Eighteen percent (18%) of individuals asked indicated they would be willing to consider serving in a volunteer leadership role, and 18% shared they would consider serving on a committee. This level of involvement is critical to the success of a campaign.
- Individuals who responded “Maybe” or “No” to participating in the campaign most often noted they do not feel able to invest the time required, their children are graduating, or they have feelings of distrust from the previous campaign.
- Overall, individuals interviewed are willing to engage with a campaign but will require reassessing campaign goals, clarity and details of the plan, and transparent communication.

CAMPAIGN INVOLVEMENT



“If it’s something I believe in, yes, absolutely I’ll help however I can.”

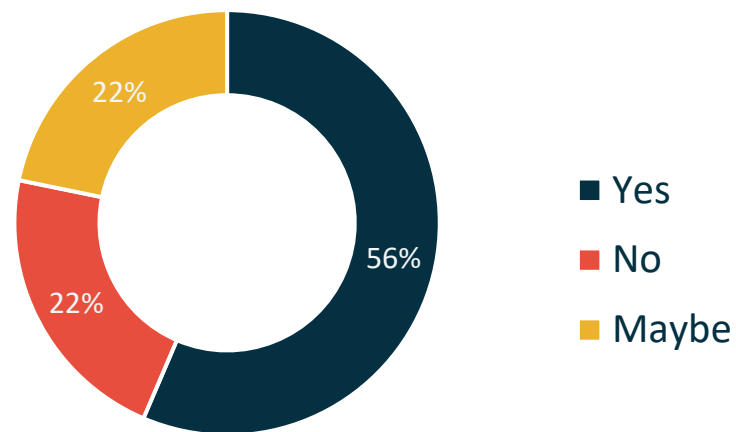
“Happy to help, just need to know the time commitment.”

Benchmark data indicates interviewees from recent religious studies who responded “Yes” to that role

GIFT INDICATIONS

- Fifty-seven percent (57%) of participants responded “Yes” when asked if they would consider making a gift to the campaign. For the individuals who responded “Maybe,” there is a desire to see the case further refined and clarified.
- Five interviewees provided a gift indication when asked, ranging from \$3,000 - \$100,000 in initial giving potential.
- When asked, 100% of interviewees noted matching gifts will be important to maximize the success of a St. Andrew campaign.

WOULD YOU GIVE A GIFT TO THE CAMPAIGN?

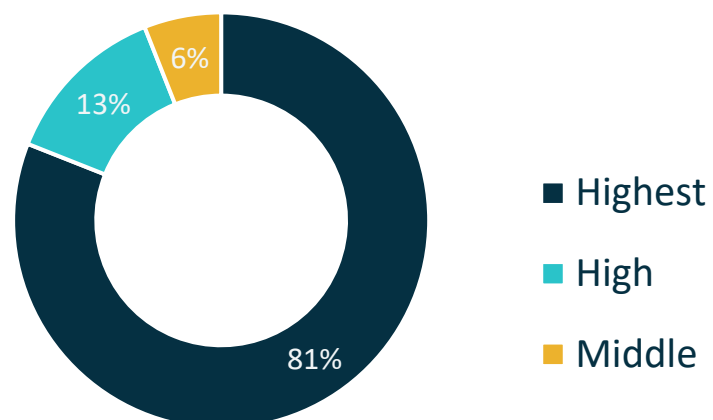


Recent CCS religious studies show an average of 72% responding “Yes” to giving a gift.

Number of Indications: **5**
 Gift Range: **\$3,000 - \$100,000**

Gift Level Indication	Count
\$100,000+	1
\$50,000+	0
\$25,000+	1
\$12,000+	1
\$6,000+	1
\$3,000+	1
TOTAL: 5	

WHERE DOES ST. ANDREW RANK ON YOUR LIST OF PHILANTHROPIC PRIORITIES



“I’ll participate no matter what. It will feel better and I’ll stretch more if I believed that there was a real shift.”



Section 3:

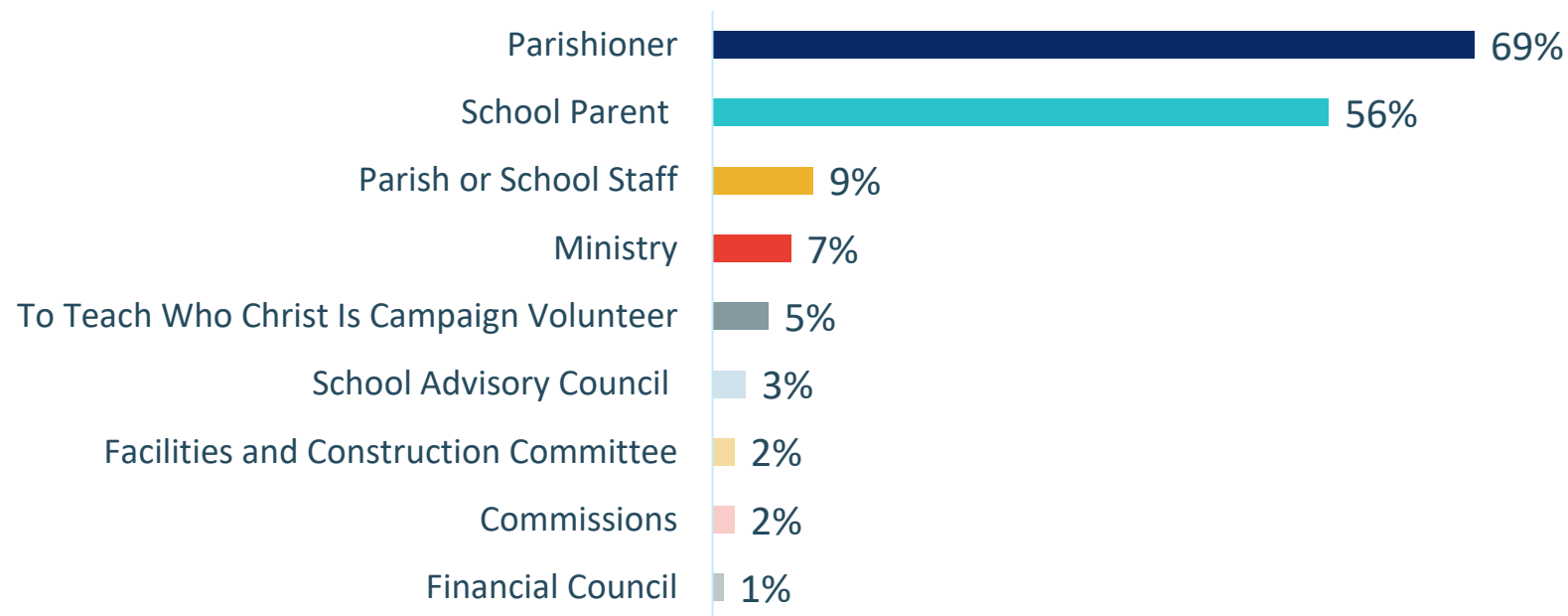
ELECTRONIC SURVEY RESULTS

E-SURVEY DEMOGRAPHICS & PERCEPTIONS

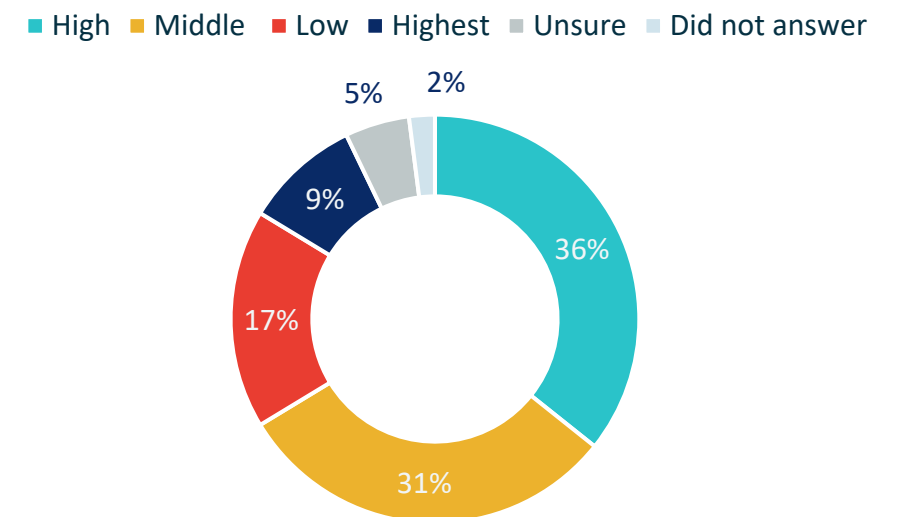
The 10-question electronic survey (e-survey) allowed the parish’s broader constituency base to share their perceptions of the organization, disclose reactions to the proposed plans, and indicate their willingness to participate in a campaign. Although important, e-survey results are meant to serve as a compliment to the strategic interviews and can be helpful in reinforcing key interview findings.

- The e-survey was emailed to 1,247 individuals and 100 surveys were completed between April 12-20, 2022, which equated to an eight percent (8%) response rate. A response rate of 7-10% is considered “good.”
- Seventy-two percent (72%) of e-survey participants have a “Very Positive” or “Positive” perception of St. Andrew.
- Sixty-seven percent (67%) of e-survey participants indicated that St. Andrew is “Highest” or “High” on their list of philanthropic priorities.

RELATIONSHIP TO ST. ANDREW



WHERE DOES ST. ANDREW RANK ON YOUR LIST OF PHILANTHROPIC PRIORITIES?



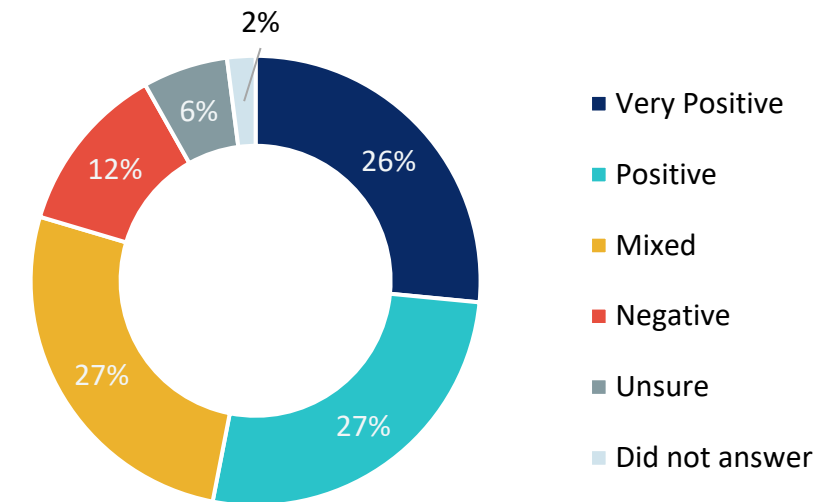
72%

of survey participated said they had a “Very Positive” or “Positive perception of St. Andrew.

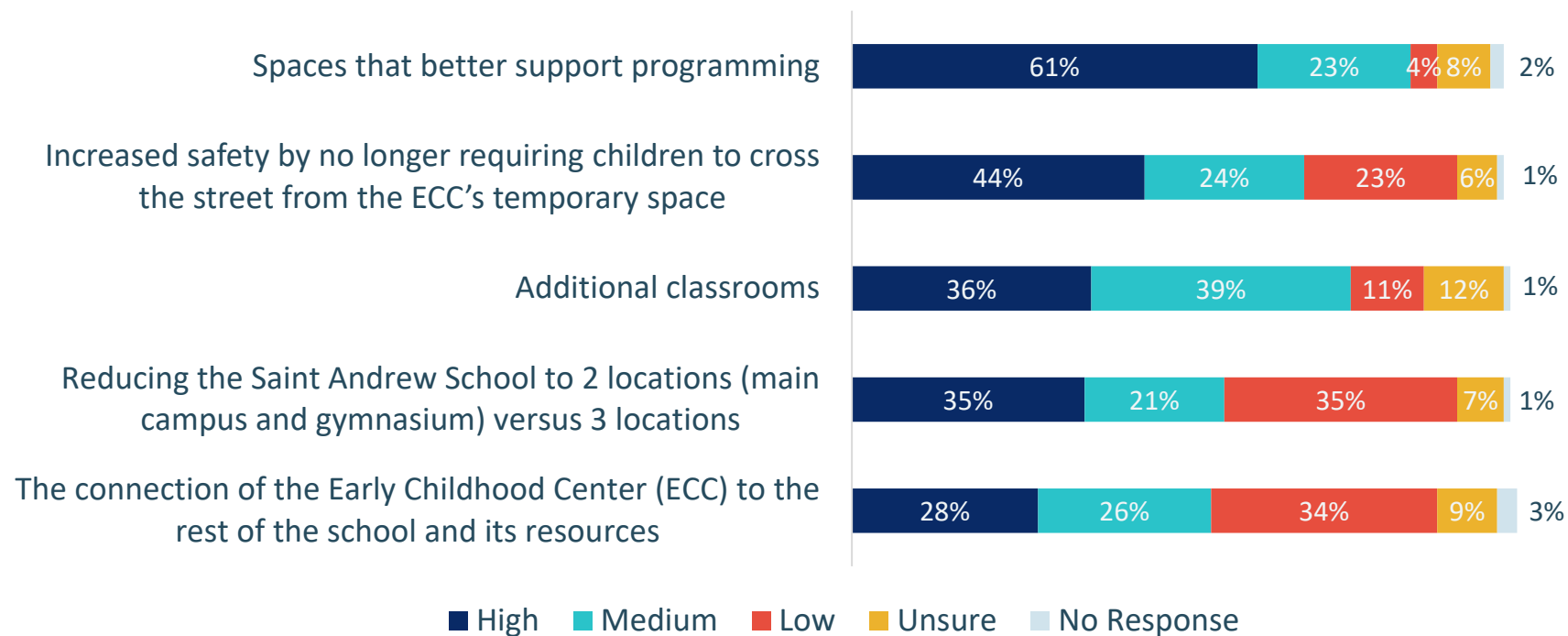
CAMPAIGN PRIORITIES & TIMELINE

Across all responses, 54% of all survey participants had a “Very Positive” or “Positive” reaction to the proposed campaign plan. Of the remaining participants, 27% had a “Mixed” reaction and 12% had a “Negative” reaction (6% “Unsure” and 2% no response). When asked to rank the case elements, spaces that better support programming stood out as highest priority with 44% of respondents ranking it as “High.” Reducing the campus to two locations and connecting the ECC to the rest of campus were identified as the lowest priority, with 35% and 34% ranking them as “Low,” respectively.

WHAT IS YOUR OVERALL REACTION TO THESE PLANS?



When asked which projects they would consider a “high” priority, e-survey participants responded:

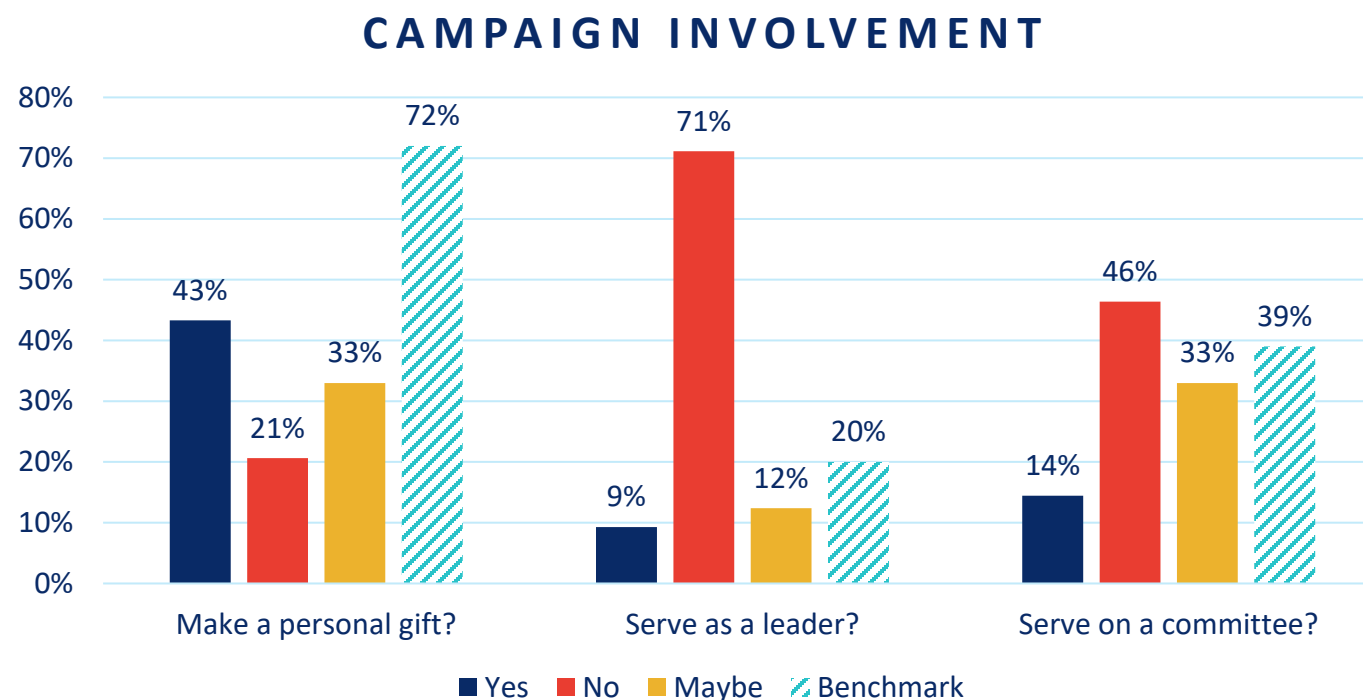


CAMPAIGN GOAL & TIMING

32% of respondents believe \$2.9 million is a realistic goal and 32% responded that they were “Unsure.” 20% believe that \$4.8 million is realistic and 6% believe \$6.8 million is realistic. When asked if this was the right time to move forward with a campaign, 52% said “Yes,” 21% said “No,” and 25% said “Unsure.”

CAMPAIGN INVOLVEMENT & INDICATIONS

- When asked about their own involvement, 9% indicated they would be willing to serve in a leadership capacity, 14% would be willing to serve on a committee, and 43% indicated they would give a gift to the campaign.
- Of the 100 respondents, 70 gave a gift indication (70%). Total gift indications from the electronic survey totaled \$441,000+.



Gift Level Indication	Count
\$100,000+	1
\$50,000+	3
\$25,000+	2
\$12,000+	3
\$6,000+	10
\$3,000+	15
Less than \$3,000	36
Total	70

Those who selected "Other" were not included in the e-survey total.

45%

of families said St. Andrew was their "high" or "highest" philanthropic priority. This is below the CCS benchmark of 85%.



Section 4:

RECOMMENDATIONS

RECOMMENDATION SUMMARY

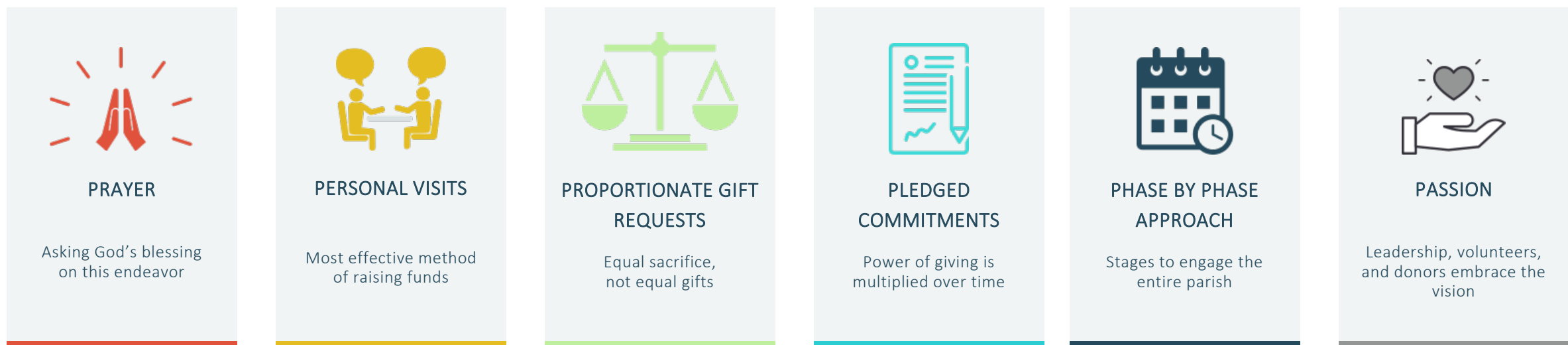
Based on the study findings and a careful review of the data, CCS recommends St. Andrew transition immediately into a continued planning and preparation stage over the next *3-6 months before setting a campaign goal*. Following the preparation stage, the campaign will proceed in a step-wise manner, with a “quiet” phase when gifts are requested from the most generous families. Once the top 20% of givers in the St. Andrew community, across the school and the church, have been met with, and a decision has been received, the public phase commences. Infused in each step of the process, the campaign will utilize the principles of Christian stewardship.

Campaign Recommendations:

1. Hold visioning sessions with school and church leadership
2. Conduct a needs assessment to identify campaign priorities
3. Develop a new compelling case for support
4. Test the case through a series of briefing meetings
5. Re-engage donors through high-level stewardship
6. Begin cultivating relationships with new families
7. Develop an appropriate and comprehensive campaign budget
8. Develop and implement a strong communication plan
9. Develop a phased plan for launching a campaign in 2023

Six Principles of a CCS Campaign

We believe six factors form the basis for a successful campaign.



1 VISIONING SESSIONS

With school and church leadership

Defining a clear vision for the campaign and the future of St. Andrew School and communicating this are fundamental to campaign success and organizational change. Throughout the study (interviews and e-survey), it was evident that perceived needs and those identified in the preliminary case for support are misaligned. The misalignment has caused hesitancy among key stakeholders to support the campaign as currently planned. Interviewees and e-survey respondents identified lack of clarity for the vision of St. Andrew School and how that supports the vision for the parish overall as a concern. To ensure Church and School leadership present a united front to the St. Andrew community, CCS recommends engaging in a series of visioning sessions that occur during May and June 2022 (see page 31 for a more detailed timeline of activities).

Ideally, visioning sessions are facilitated by a non-biased third party, such as CCS, to support the activities and discussion from an objective perspective. Participants are encouraged to be open to change and perspectives different than their own. Visioning sessions occur in a workshop setting. There are three components to a successful visioning workshop:



INDIVIDUAL VISIONS

- 15 minutes
- Facilitator prompts participants to envision St. Andrew 10-20 years in the future
- Individuals outline their hopes for St. Andrew
- Each participant shares their vision with the group
- Outcome: individual expression of vision for the future



COLLECTIVE VISION

- 30 minutes
- Participants are invited to draw from individual visions and design a collective model
- Facilitator prompts participants to identify all key characteristics that differentiate St. Andrew from other schools/parishes now and in the future
- Outcome: written group description of the vision for St. Andrew



REFINE

- 20 minutes
- Summarize the written description into a positive, specific, and brief statement
- Outcome: a singular vision for St. Andrew

Note: Multiple workshops may be necessary



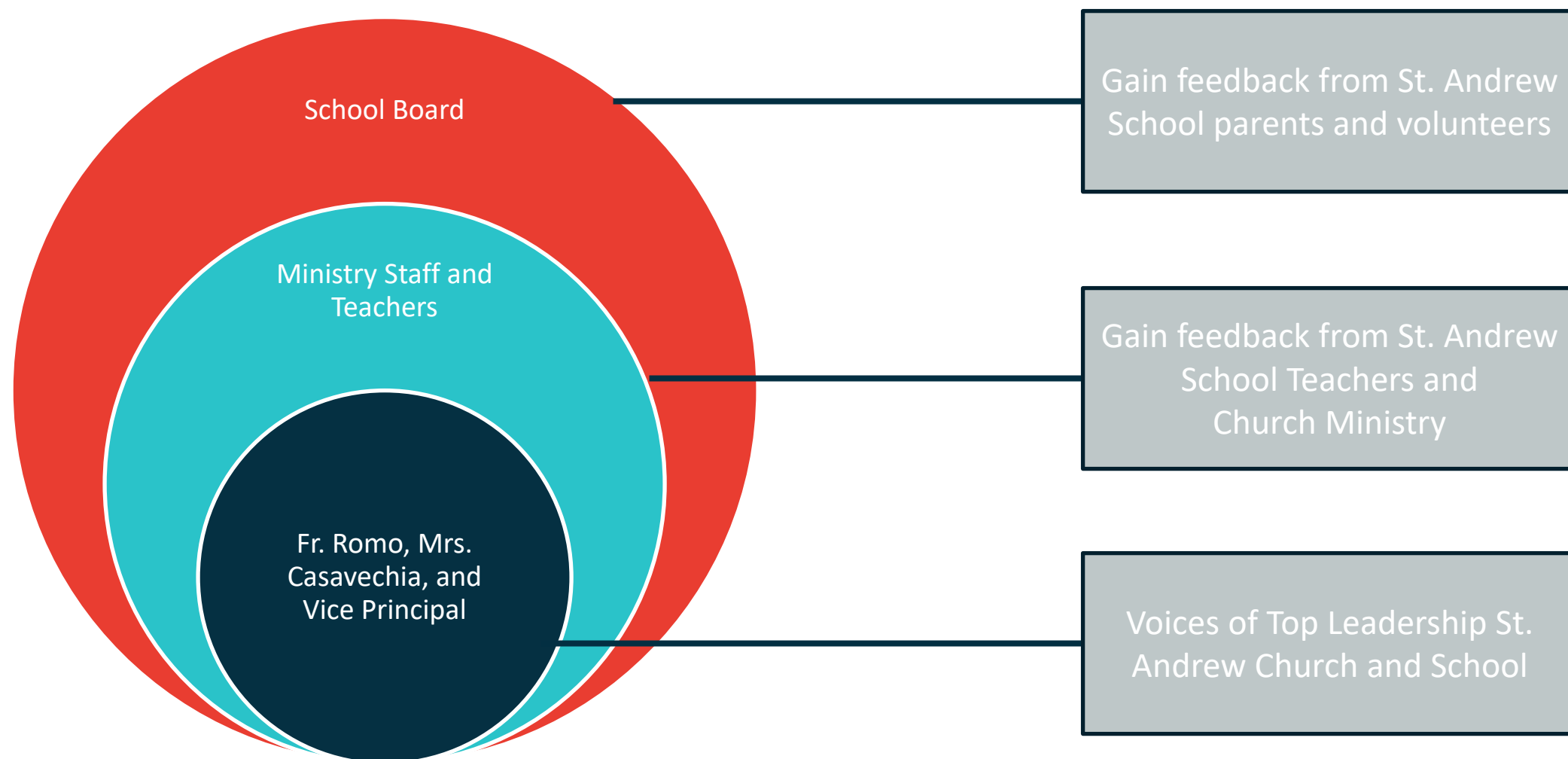
“Priorities are mixed – there aren’t common goals.”

1

VISIONING SESSIONS

With school and church leadership

A proposed structure for the visioning process is outlined below, starting with key Church and School leadership. As the vision becomes more refined, testing the vision with key stakeholders will help achieve buy-in to the future of St. Andrew Parish and a capital campaign. Furthermore, it will enable individuals at every level of the St. Andrew community to succinctly articulate and understand the goals of the campaign and the parish overall, building community and reducing misinformation.

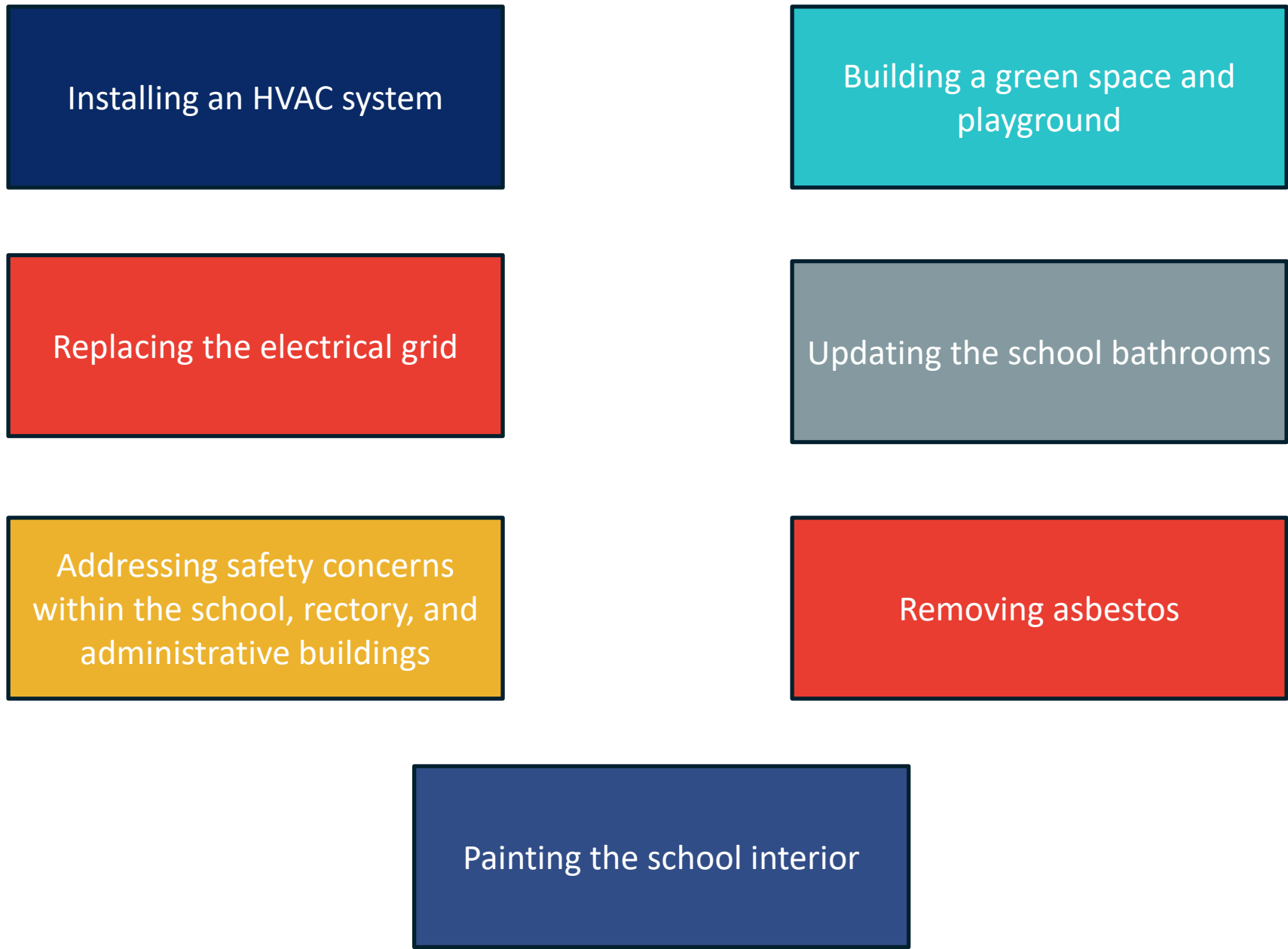


2

CONDUCT A NEEDS ASSESSMENT

To identify campaign priorities

Defining a clear vision for the campaign and the future of St. Andrew School will be further supported by conducting a needs assessment in concert with the visioning sessions discussed on pages 20-21. This feasibility study uncovered several needs within the existing school and parish campus that parents and staff alike hope to see addressed prior to constructing a new building. While this study offers a starting point for a needs assessment, further evaluation is necessary to understand the scope of these issues and should be conducted by an un-biased third party, such as CCS. The needs most often mentioned during the feasibility study are listed below:



3

DEVELOP A COMPELLING CASE FOR SUPPORT

Incorporating visioning and needs assessment findings

Defining a clear vision for the campaign and the future of St. Andrew School and communicating this are fundamental to campaign success. Detailed plans for the campaign should be refined and approved by St. Andrew leadership using the information presented in this report along with visioning sessions and a needs assessment.

A. Increase Transparency & Specificity

Throughout the strategic interviews several frequently asked questions emerged. These questions, in addition to overarching themes that need to be addressed in future messaging, are listed below.



HISTORY & VISION

- What happened in the previous campaign (time, goal size, amount realized, use of funds)?
- Is there a guarantee that funds raised will go to the school?
- What is the vision for the future of St. Andrew School and Church and how does this campaign support that?



RATIONALE & IMPACT

- How were the projects determined?
- Who is making the decisions?
- Were the school leadership and school board included in the creation of the case?
- If the previous campaign was not achieved, why would this one be successful?



PROJECTS

- Early Childhood Center
 - Detail why these projects are important, why they are necessary at this time.
 - Clarification and detail on project costs and design.
 - The school's needs have changed. Why doesn't this plan reflect that?
- Green Space
 - Why was this project mentioned only once in the case?
 - Where will it go and is this in addition to the planned playground in front of the administration building?
- Infrastructure
 - Updates to the main building are required with an addition to bring the campus up to code. Why is there no mention of this? What infrastructure updates would occur with an addition, and where?
 - Why aren't we focusing on the significant infrastructure needs in the current building first?

3

DEVELOP A COMPELLING CASE FOR SUPPORT

Incorporating visioning and needs assessment findings

B. Refine the Case Elements

Based on the interviews and surveys, respondents strongly support a capital campaign, but with different priorities than those tested in the current case. The priorities identified (to be confirmed through visioning and a needs assessment) fall into the following categories. Within each of these categories, further clarification and details will need to be provided in the refined case, allowing the community to understand the intended plan, anticipated impact, and their return on investment.



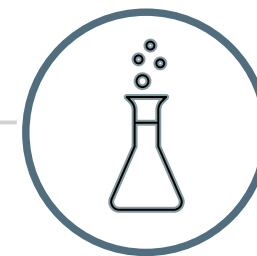
INFRASTRUCTURE

- Install an HVAC system
- Replace the electrical grid
- Replace windows
- Update bathrooms
- Paint the school



OUTDOOR SPACE

- Playground for younger kids
- Green space for older kids
- Equipment such as basketball hoops



SPECIAL CLASSROOMS

- Build a STEM Lab using existing space
- Restructure existing space to create breakout rooms
- Renovate existing space to create a music room with good acoustics



“COVID showed us how important ventilation is.”



“My son keeps asking me when we’re getting a playground.”



“A STEM lab would make St. Andrew more competitive.”

3

DEVELOP A COMPELLING CASE FOR SUPPORT

Incorporating visioning and needs assessment findings

C. Utilize Diverse Methods of Communication

Clearly explaining the purpose of this potential campaign is crucial to gaining support from individuals and families reinforcing the strong sense of community that already exists within the St. Andrew community. Furthermore, communications should express the vision for the future of the parish as a whole and how this campaign supports that vision. To do so, it will be important to employ a diverse communication strategy to best engage all families, across all generations in the St. Andrew community (*see page 30 for more detail*). Examples of how to strategically and regularly engage families can include:

- Videos (Video from experts on each case component, update from the study, etc.)
- Quarterly campaign updates
- Town Halls
- Pulpit Announcements
- Targeted Email Blasts
- Social Media Posts
- Newsletter

D. Begin General Education About the Campaign to the Community

Thirty-three percent (33%) of interviewees had little to no familiarity surrounding the proposed campaign plan. CCS recommends in the preparatory months of the campaign (following visioning and a needs assessment) providing educational opportunities to inform the parish about the vision of the campaign, the result of the previous campaign, estimated projects, and the anticipated timeline of new campaign (*see page 30 for more detail*).

E. Clearly Contextualize the Current Situation

Most interviewees and many e-survey respondents questioned what went wrong with the previous campaign, citing lack of communication and transparency as the core issue. To regain trust and build the foundation for a successful campaign, CCS recommends clearly addressing the issues surrounding the previous campaign. The St. Andrew community wants to know: 1) Why the campaign was under-budgeted and why the cost to complete has more than doubled; 2) How much is in the bank from the previous campaign that is dedicated to the school projects; and 3) Why the school projects have been delayed. The community desires regular updates on the campaign from leadership, even if an update includes a campaign setback. Increased transparency, communication, and action will lead to greater trust and success in future fundraising endeavors (*see page 30 for more detail*).



“Be transparent about the last campaign.”

4 CONDUCT BRIEFING MEETINGS

With all study participants and other key constituents

At the helm of any campaign, the core leaders set the tone, vision, and momentum for the effort. For a St. Andrew campaign, church and school leadership must be united in the vision and plans. Following visioning sessions and a needs assessment, Fr. Romo and Mrs. Casavechia (as the incoming principal) should jointly conduct briefing meetings with every interviewee and other key constituents.

Purpose:

Briefing meetings are intended to update all study participants on the status of the campaign plans and thank them again for their participation and feedback. This is an opportune time to test the refined case (based on visioning and needs assessment) and garner further feedback on the proposed campaign plans. Additionally, briefings will help define the ultimate campaign goal. These meetings also serve as a stewardship tool for existing donors. Communicating clearly and regularly with all donors, especially key individuals in the community, will help build trust and belief in the project. Personal meetings such as these are the most effective method of raising funds and achieving buy-in because it enables the campaign team to explain the case details in a comfortable environment and families are invited to participate in a very personal way (see page 27 for more detail).

Who:

In addition to updating study participants, briefing meetings are valuable to discover and cultivate new donors. Specifically, there are many new, young families in the St. Andrew School eager to help however they can. Providing them with an opportunity to hear from church and school leadership about the vision for the campaign and the future of the parish (and offer their own feedback) will motivate their investment of time and financial resources in the campaign (see page 28 for more detail).



“We want to see progress.”



“The Annex coming down was a great first step.”



“There are parents just waiting to be asked.”

5

ENGAGE IN HIGH-LEVEL STEWARDSHIP

To re-engage existing donors

Due to the current environment, this is a critical time to steward existing relationships, particularly among donors to the previous campaign. When asked about leadership for this campaign, the majority of participants noted frustration and distrust stemming from the previous campaign. To best prepare for the next campaign, Fr. Romo and other key leaders should implement a disciplined donor engagement process for parish members and school families that include the following stages: discover, cultivate, brief, ask, and steward.

DISCOVER	CULTIVATE	BRIEF	ASK	STEWARD
<p>Learn more about each family and their affiliations, involvement, and tie to the parish. Ways to do this can include:</p> <ul style="list-style-type: none"> ▪ Reviewing the roster or directory ▪ Introducing yourself after mass or at a school function 	<p>Take hold of opportunities to engage families on a deeper level. This could include:</p> <ul style="list-style-type: none"> ▪ Conducting phone calls ▪ Review of architect renderings ▪ Inviting families to special programs or meetings 	<p>Educate the families about the campaign, determine their interest and investment level. This could look like:</p> <ul style="list-style-type: none"> ▪ One-on-one meetings ▪ Tours of St. Andrew school ▪ Introduction to campaign chairs 	<p>In an in-person meeting ask for their support at a specific giving level. This would look like:</p> <ul style="list-style-type: none"> ▪ One-on-one meeting with solicitor (Fr. Romo, Mrs. Casavechia, Campaign chair, Committee member, etc.) 	<p>Actively re-engage the family, thank them for their gift, and/or continue building the relationship. This could look like:</p> <ul style="list-style-type: none"> ▪ Impact reports ▪ Update on status of previous campaign ▪ Tour of property additions/repairs ▪ Thank-you letters

Stewardship by Donor Group

When considering how to engage different donors it will be important to utilize engagement strategies targeted for each donor group. For St. Andrew Parish, this means three groups: 1) parents who participated in the previous campaign, 2) parents who did not, and 3) parishioners only (not school parents). For the first group, it will be important to provide context for the status of the previous campaign: why it was not fully realized and what the raised funds were used for. Additionally, it will be important for the church and school leadership to explain, together, why most raised funds go to the church (one tuition, for example) to benefit the entire parish. Additionally, parents will expect a guarantee that funds will be used as intended. For group 2, it will be important to simply offer them a seat at the table by volunteering, giving a gift, or helping make decisions regarding the campaign. The parishioners only group will need to understand the broader vision for St. Andrew Parish and how a capital campaign for the school supports that vision. For all donors, complete transparency about the previous campaign, the proposed campaign plans, and beyond by way of frequent updates is critical.

6 DISCOVER & CULTIVATE DONORS

Focusing on new and young families

Similar to stewardship, cultivation of new and young families at the school is key for a successful St. Andrew campaign. As on the previous page, implementing a disciplined donor engagement process for parish members and school families that include the following stages: discover, cultivate, brief, ask, and steward, is necessary.

DISCOVER	CULTIVATE	BRIEF	ASK	STEWARD
<p>Learn more about each family and their affiliations, involvement, and tie to the parish. Ways to do this can include:</p> <ul style="list-style-type: none"> ▪ Reviewing the roster or directory ▪ Introducing yourself after mass or at a school function 	<p>Take hold of opportunities to engage families on a deeper level. This could include:</p> <ul style="list-style-type: none"> ▪ Conducting phone calls ▪ Review of architect renderings ▪ Inviting families to special programs or meetings 	<p>Educate the families about the campaign, determine their interest and investment level. This could look like:</p> <ul style="list-style-type: none"> ▪ One-on-one meetings ▪ Tours of St. Andrew school ▪ Introduction to campaign chairs 	<p>In an in-person meeting ask for their support at a specific giving level. This would look like:</p> <ul style="list-style-type: none"> ▪ One-on-one meeting with solicitor (Fr. Romo, Mrs. Casavechia, Campaign chair, Committee member, etc.) 	<p>Actively re-engage the family, thank them for their gift, and/or continue building the relationship. This could look like:</p> <ul style="list-style-type: none"> ▪ Impact reports ▪ Update on status of previous campaign ▪ Tour of property additions/repairs ▪ Thank-you letters

Many interviewees noted that there is an abundance of young and/or new parents to St. Andrew School who are eager for volunteer and fundraising opportunities. Very few of these individuals were included in study interviews, so St. Andrew leadership must take measures to discover these families and understand where their interests lie. This can begin with simple introductions at school pick-up or drop-off, after mass, or at a school event. Once discovery is made, cultivation efforts may begin by inviting families to a town hall about the campaign, for example.

7

DEVELOP AN APPROPRIATE BUDGET

That addresses the full cost of the project

Although volunteer-driven, a successful campaign will require an investment. Campaigns that struggle to reach financial goals typically have limited investment of necessary resources, ultimately impacting the campaign timeline. A clear budget should be outlined to allow for efficient and effective campaign execution. Overall, campaign budgets are typically 10-15% of the campaign goal. The common wisdom in terms of capital campaigns is that it costs between 10-15 cents to raise one dollar. CCS-led religious campaigns are often on the lower end of this range. Below is an example budget representing 10% of a \$2.9M campaign.

Throughout the study, questions regarding the previous campaign budget were asked frequently. Potential donors indicated that before an ask – or even considering a gift – they will request to review the budget to ensure that it is airtight and representative of the full cost of the campaign. Further, constituents expressed a desire to see one complete plan, rather than three. This plan would outline each aspect of the project with a high-level of detail, including associated costs and architectural renderings.

Budget Area	Items	% of Budget	Preliminary Estimate
Personnel	<ul style="list-style-type: none"> Fundraising counsel and/or staff dedicating time to the campaign 	75%	\$217,500
Campaign Office & Support	<ul style="list-style-type: none"> Administrative support Office equipment Supplies Research Database support 	5%	\$14,500
Marketing & Communications	<ul style="list-style-type: none"> Collateral materials Case for support Audio-visuals Newsletter(s) Printed materials Digital and social media strategy 	10%	\$29,000
Travel & Meeting Expenses	<ul style="list-style-type: none"> Meetings Transportation Special events Cultivation activities 	10%	\$29,000
TOTAL			\$290,000

8

DEVELOP A STRONG COMMUNICATION PLAN

To deploy immediately

Given the strong desire for more frequent and comprehensive communications among interviewees and e-survey respondents alike, CCS recommends developing a robust communication plan to implement immediately and indefinitely. Frequent and transparent communication support a foundation of trust and leave fewer questions unanswered. Furthermore, it garners stronger buy-in to activities within the parish – both at the church and the school – especially given the overall lack of knowledge surrounding the current campaign plans and the outcome of the previous campaign. Below is a recommended starting point for a communication plan:

Month	Communication	Content	Audience
May	<ul style="list-style-type: none"> Thank you letter – interview Thank you eblast – e-survey Monthly bulletin insert 	<ul style="list-style-type: none"> Message of thanks for participating in the campaign Final Report Executive Summary 	<ul style="list-style-type: none"> Interviewees (letter) Full email list (e-survey respondents) Parishioners
June	<ul style="list-style-type: none"> Transparent update eblast Monthly bulletin insert 	<ul style="list-style-type: none"> Funds raised during the previous campaign (amount and designation) Reason(s) the campaign was not fully realized Status of current effort (needs assessment and visioning process is underway, for example) 	<ul style="list-style-type: none"> School Board School parents School & Church staff Parishioners
July	<ul style="list-style-type: none"> Transparent update eblast Monthly bulletin insert 	<ul style="list-style-type: none"> Outcome of visioning and needs assessment Alignment of pending campaign to visioning and needs assessment outcomes 	<ul style="list-style-type: none"> School Board School parents School & Church staff Parishioners
August	<ul style="list-style-type: none"> Invitation to briefing meeting Monthly bulletin insert 	<ul style="list-style-type: none"> Personal update on the campaign and case refinement with Fr. Romo and Mrs. Casavechia 	<ul style="list-style-type: none"> Interviewees Top donors Key stakeholders Parishioners

Monthly bullet inserts should complement the other communications for each month. Beyond August 2022, CCS recommends quarterly updates on the status of the campaign planning period and throughout the duration of the campaign. These communications should be woven into the existing St. Andrew communication plan.

9

DEVELOP A PHASED CAMPAIGN PLAN

To launch in 2023

CCS recommends that St. Andrew Parish enter a campaign runway period lasting 6-12 months, during which further preparation and planning outlined in these recommendations are completed. Following the campaign runway, if the necessary steps are taken, CCS recommends moving into a capital campaign with an emphasis on early leadership gifts to set the pace for campaign success and build momentum. The early pace of the campaign will dictate the length of the overall effort.

KEY ACTIVITY	MONTH OF											
	MAY	JUNE	JULY	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APRIL
Hold visioning sessions with Church and School leadership												
Conduct a needs assessment for the school												
Refine the case for support												
Finalize the case for support												
Develop and implement a robust donor engagement plan												
Church leadership present and visible at school functions												
Recruit campaign leadership												
Thank all of the study participants and include the Executive Summary of the final report												
Hold briefing meetings with all study participants												
Discover new families												
Cultivate new families												
Steward existing donors												
Communicate the outcome of the previous campaign, transparently												
Identify top prospects to prioritize												
Secure campaign gifts from campaign chair, steering committee members, and key donors												
Develop a strong communication plan												
Implement the communication plan												
Develop a comprehensive campaign budget												
Establish benchmarks, tracking, and reporting practices												
Develop a campaign timetable												
Prepare campaign policies and naming opportunities												
Prepare donor engagement materials												
Establish a regular campaign meeting schedule for staff, committee, and leadership												
Launch campaigning with 2023 "Wearin' the Green" paddle raise												





Section 5:

NEXT STEPS

IMPORTANT NEXT STEPS TO CONSIDER

1

DISCERN WHAT IS BEST FOR ST. ANDREW

- Review the proposed campaign plans and recommendations
- Formally endorse the recommendations

2

COMMUNICATION PLAN

- Thank all study participants and share the executive summary
- Develop and implement a comprehensive communication plan

3

VISIONING SESSIONS

- Incorporate opportunities to educate the congregation about the vision and intended impact of the campaign (announcements, videos, emails)

4

NEEDS ASSESSMENT

- Finalize campaign plan and timetable
- Craft a compelling case for support
- Identify and recruit campaign leadership



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Section 6:

APPENDIX





LEADERSHIP STRUCTURE

For a St. Andrew campaign

CCS's experience shows that campaigns are most successful when the pastor and leadership bodies have a core group of volunteers, commonly referred to as the Campaign Executive Committee (CEC), with whom to work. This volunteer body will help to serve as an extension of the leadership team in inviting support and building community within the campaign. It is recommended that the CEC be a cross representation of the parish (church and school) by gender, race, and age as well as a combination of established and new leadership to diversify the groups represented on the committee. During the planning stages, Campaign Chair(s) and the CEC should be invited to volunteer by the Fr. Romo and Mrs. Casavechia. A suggested framework for general volunteer leadership throughout the campaign is as follows:

Committee Name	# Needed	When Needed	Responsibilities
Father, Principal, & Campaign Chair(s)	1-2	Entire campaign	<ul style="list-style-type: none">▪ Provide overall leadership for the campaign▪ Set an example through a personal commitment to the campaign▪ Identify and recruit the CEC▪ Attend all appropriate meetings relative to the campaign▪ Announce campaign developments to the congregation▪ Make Leadership and Major Gift requests▪ Pray for the campaign
Campaign Executive Committee	4-6	Entire campaign, with focus on activity during early months	<ul style="list-style-type: none">▪ Set an example through personal commitment▪ Review and endorse the case for support and campaign plan▪ Communicate the need for the campaign to the congregation▪ Lead specific phases of the campaign▪ Support all lead gift efforts including briefing material creation, meetings, and debriefs▪ Aid in the visits and solicitation efforts of all Leadership Gift Phase families▪ Visit with and solicit gifts from other church families, particularly in Major Gifts phase▪ Pray for the campaign
Room Parent Committee	20	Entire campaign	<ul style="list-style-type: none">▪ Set an example for other school parents▪ Answer questions from other parents about the campaign▪ Advocate for the campaign priorities and correct misinformation▪ Remain up-to-date on status of campaign▪ Pray for the campaign



LEADERSHIP STRUCTURE

For a St. Andrew campaign

Church & School Leadership

When asked about his role within the campaign, interviewees reflected how Fr. Romo will need to serve as a visionary leader, a voice and advocate for support, the lead in helping to shape the culture and mission of the campaign, and a visible presence within the school and at school functions. Fr. Romo and Mrs. Casavechia must be united on the vision and plans to garner broad support among the St. Andrew community. Central to the success of this campaign, it will be important for Fr. Romo and Mrs. Casavechia to take part in all cultivation meetings and key solicitations. These will be completed in partnership with CCS counsel and other volunteers as applicable. In addition, Fr. Romo's and Mrs. Casavechia's respective roles will include:

- Praying for the success of the campaign
- Dedicating time to the campaign
- Taking part in key cultivation meetings
- Participating in key solicitations
- Being the voice of the campaign
- Remaining informed on latest campaign progress and parish finances
- Participating in all significant planning meetings
- Keeping the focus on the important purpose of the campaign

Campaign Coordinator

In partnership parish and campaign leadership and CCS staff, the campaign coordinator will help to streamline communications between teams, help in material preparation, and help to coordinate initiatives throughout the campaign. In addition, this role may include:

- Praying for the success of the campaign
- Dedicating time to the campaign
- Managing campaign calendar
- Preparing emails and newsletters
- Working with CEC on producing bulletin inserts and pulpit announcements
- Overseeing communication with other fellow staff

Extended Leadership Team (Staff, Ministry Team, School Board)

In concert with Fr. Romo and Mrs. Casavechia, the Campaign Coordinator, the school board and remaining staff at the church and school will help in pushing the mission and vision of the campaign forward. Aid from this core group of staff will be requested for the following: covering the campaign in prayer, being additional voices and advocates for the campaign, providing information on FAQs about the campaign, and helping with pledge input and processing. As an extension of their current roles, all governing bodies will help to approve all campaign policies, plans, and solicitation materials. In addition, these groups will help to further advocate for the campaign and the stewardship of all campaign donors.