

# Assessment Study

## *St. Peter's Episcopal Church*

### *Freehold, New Jersey*



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***Assessment Study for St. Peter's Church  
Freehold, New Jersey  
May, 2016***

Prepared by Jeffrey Knauer, EVP, Kirby-Smith Associates

**I. Introduction**

St. Peter's Church has been considering the possibility of a solution to its aging Parish House for a number of years. More than eight years ago, a Feasibility Study was conducted to explore the possibility of constructing a new Parish Hall and dismantling the current Parish House. This Feasibility Study was conducted to investigate forward movement but did not make surveys available to the entire parish. The Parish House was in need of major repairs and it was suggested that funds may be better spent on new space as opposed to investing in an aging building that only promised more repairs in the future. Action was not taken at that time as costs for the new space that was proposed was far in excess of what the parish felt they could afford.

A Capital Visioning Team began serving in January of 2016 to propose options of how concerns about the same aging Parish House may be addressed at this time. The options were determined and submitted to the full parish for consideration. These options included major renovations to the current Parish House or construction of a more modest new Parish Hall.

Parish members were invited to participate in an Assessment Study in which they would supply feedback and opinions following a prepared questionnaire designed for that purpose. They were also invited to participate in personal interviews to explain and discuss their views. Conducting the interviews was Jeffrey Knauer, EVP with Kirby-Smith Associates, the church consulting firm retained to conduct the Assessment.

In preparation for the Assessment, every parish household received a series of letters describing the proposed options for consideration, details involving pros and cons of the options, and details explaining the Assessment process. Town Hall gatherings were held before or after services on April 23 and 24 to provide more details to parish members. Questionnaires and instructions were distributed and members were asked to schedule interviews with Mr. Knauer if at all possible. Those interviews were held on May 5, 10, 11, 14, and 15.

It was decided that a minimum participation goal of 50% of all regularly contributing households to St. Peter's would be the target to validate study results. As 110 households either make a financial pledge to the budget or contribute on a regular basis apart from

pledging, the participation goal was set at 55 households. Actual participation totals included 74 households, 53 of which participated in interviews and 21 that submitted written responses. This total of participants included a total of 99 individuals, 73 of whom were interviewed and 26 who submitted written responses. This level of participation represents 67% of the contributing families of St. Peter’s. This strong level of participation strengthens the Assessment results as being very representative of the overall parish views.

All those who made time to be involved in the Assessment are to be thanked for their time. The Capital Visioning Team is also to be thanked for the many hours spent in preparing the options, the study, and all associated communications.

**II. Data and Analysis**

Each question that was posed on the questionnaire employed by the study will be treated separately. Results will be shown for the group who was interviewed, those who submitted only written responses, and the overall totals. Brief comments will be offered while a more in-depth analysis of results will be offered later in the report.

**Please note: not all participants responded to every question. Non-respondent totals will be noted but percentages will be based on only those who answered.**

**QUESTION 1: LENGTH OF TIME ATTENDING THE CHURCH**

	Interviews		Written		Overall	
5 Years or Less	7	10%	7	27%	14	14%
6 – 10 Years	6	8%	2	8%	8	8%
11 – 19 Years	14	9%	2	8%	16	16%
20 Years or More	45	63%	15	58%	60	61%
No Response	1				1	

This first question was asked in order to establish demographics for study participants. The question asked how many years the participant has been attending St. Peter’s Church. Like many churches, St. Peter’s has a pattern of membership more heavily slanted toward those who have been attending for many years, in some cases a life-long tenure. This factor often indicates a congregation with a strong presence of senior citizens. This is true in the case of St. Peter’s.

However, not all those attending for many years fit into the category of seniors. A significant number of members are in their middle aged years and younger. Some members shared that several generations of their families have attended St. Peter’s.

About 60% of participants have been attending for 20 years or more. About 8% have been attending from 11–19 years. Combining the other two categories, about 22% have been attending for 10 years or less. This suggests that, while a majority of members have been at St. Peter’s for many years, there is a newer constituency present. While growing a congregation is usually a topic of concern, it should be noted that St. Peter’s has gained a number of new members in recent years.

**QUESTION 2: LEVEL OF INVOLVEMENT IN THE CHURCH**

	Interviews		Written		Overall	
Very Involved	25	34%	1	4%	26	26%
Involved	27	37%	9	35%	36	36%
Somewhat Involved	16	22%	4	15%	20	20%
Not Very Involved	5	7%	12	46%	17	17%

This question was asked in order to measure how involved members envision themselves to be in the church. The value in asking this question has to do with the fact that, in many cases, those who are more involved tend to take more interest in projects and may contribute more to the positive outcomes of those projects.

Study results show that 82% of participants consider themselves to be involved at some level at St. Peter’s. About 26% consider themselves to be very involved, 36% involved, and 20% somewhat involved. Many of those who consider themselves to be not very involved selected that category due to limited physical mobility. Many spoke of how they had been very involved in years past.

The significance of these results is that one national measure has average church involvement levels at 60% compared to 82% at St. Peter’s. Comparatively speaking, St. Peter’s has an above average level of involvement compared to the national average. This may suggest a high level of interest, satisfaction with church ministries, and a strong sense of Christian responsibility among members. This can be proven by the many volunteers involved in outreach programs to the community based at St. Peter’s.

**QUESTION 3: HOW WELL ST. PETER’S IS SERVING ITS MEMBERS**

	Interviews		Written		Overall	
Very Well	35	48%	8	32%	43	44%
Well Enough	32	44%	13	52%	45	46%
Neutral/No Opinion	5	7%	4	16%	9	9%
Not Very Well	1	1%	0	0%	1	1%
Not Very Well at All	0	0%	0	0%	0	0%
No Response			1		1	

This question was asked for the purpose of soliciting an overall opinion of the church apart from the capital projects. The reason for this question was to gain a sense of community among participants as their overall views of the church can have an effect on the forward movement of proposed projects.

Of the 99 participants, 98 responded to the question with a positive view held by 90%. About 44% feel the church is serving its members very well while 46% feel the church is doing well enough. About 9% are neutral and 1% is not satisfied with how members are being taken care of at the parish. This is a very positive response. More than a few members attributed their responses to the arrival of Father Dirk in the position of Rector. Though he is relatively new to the parish, the impact of his pastoral care and calming style of leadership has been appreciated by many.

**QUESTION 4: LEVEL OF UNDERSTANDING OF OPTIONS DETAILS AND REASONING**

	Interviews		Written		Overall	
Very Well	50	68%	11	42%	61	62%
Well Enough	18	25%	9	35%	27	27%
Somewhat	4	5%	5	19%	9	9%
Not so Well	1	1%	1	4%	2	2%
Not at All	0	0%	0	0%	0	0%

This question was asked for the purpose of learning how well participants understood the details of the options presented to them along with the reasoning behind those options. Eighty-nine percent (89%) of participants had a good understanding of the information sent

and explained to them, with 62% saying they understood very well and 27% understanding well. Another 9% had somewhat of an understanding of the material with only 2% having less of an understanding.

These responses suggest that project information was well presented and well distributed among parish members. It also suggests that members possessed a satisfactory level of understanding in order to respond to the Assessment questions. Judging by these factors, the Assessment results are representative of the views of informed parish members.

This question also offered participants an opportunity to list other items it would be helpful for them to know. Below are those responses along with how many participants asked or said essentially the same thing:

- 6 It would be helpful to learn of the long-term vision of what we are trying to do, and be sure our current ministry structure and supply of volunteers align with that vision.
- 6 Determine project costs and strategies for meeting those costs as soon as possible, along with explaining the fundraising process.
- 4 Explain how this project will bring new and younger families into the parish.
- 2 Will we build right away or wait until all the money is collected?
- 2 What if some people who commit move during the campaign period?
- 2 Will we consider other options of what can be done, whether in new construction or in renovating the current Parish House?
- 2 How many families currently support the church financially?
- 2 What items may need to be addressed in the current Parish House while we build new space or to maintain it if we do no construction at this time?
- 1 Where would a new building be located and what would the campus then look like?
- 1 How well will the grounds be kept if upgraded? Is safety an issue to consider?
- 1 What material would be used to fill in the Parish House foundation if it is dismantled?
- 1 We need H/C accessibility.

## QUESTION 5: PRIORITY OF ITEMS ACCORDING TO YOUR VIEWS

Item	High 3 Pts	Medium 2 Pts.	Low 1 Pt.	No Response 0 Pt.	Total Points
H/C accessibility to all levels and restrooms	91	5	1	2	284
Modern, functional, more inviting classrooms	56	35	4	4	242
Configurable spaces, both large and small	59	32	3	5	244
Commercial grade kitchen	76	19	1	3	267
Space for parish music, practice, and vesting	51	35	10	3	233
Adequate storage space for various ministries	54	38	5	2	243
Technology throughout the building	49	38	8	4	231
Energy-efficient methods used in construction	60	28	7	4	243

Order of priority according to point totals (highest priority to lowest)

- 284 H/C accessibility to all levels and restrooms
- 267 Commercial grade kitchen
- 244 Configurable spaces, both large and small
- 243 Adequate storage for various ministries
- 243 Energy-efficient methods used in construction
- 242 Modern, functional, more inviting classrooms
- 233 Space for parish music, practice, and vesting
- 231 Technology throughout the building

Participation in prioritizing proposed items supplied the following information: H/C accessibility throughout, whichever option may be chosen, was deemed the highest priority. A constant topic of discussion throughout the interview process was the inability of current facilities to afford parishioners and guests access to many important parts of the building. This is seen as a hindrance to both parish life and outreach ministry.

The second highest priority was a commercial grade kitchen. This is seen as a necessity especially for continuation of multiple parish feeding programs, as well as conformity to new or proposed laws concerning the use of foods prepared offsite in home kitchens. Having a kitchen is seen by some as a way to expand parish options in community outreach and may be a way to generate additional revenues.

The rest of the proposed items are interestingly packed together in regards to prioritization. This suggests a similar level of consideration by study participants with only a slight drop



off regarding space for parish music, practice, and vesting, and technology throughout the building. Regarding music space, some understood that this space currently exists though it can be improved. Technology was not an item understood by all participants so was ranked lower by some.

All in all, there is much consensus among members for items that were proposed as priorities by the Capital Visioning Team.

## **QUESTION 6: OTHER ITEMS NOT ON THE LIST THAT SHOULD BE CONSIDERED OR ADDED**

This question was asked for the purpose of learning what other items study participants considered important in conjunction with any project that may be considered. While asked to rate their items as to high, medium, or low priority, some included a rating and some did not. Most who did rate their suggestions rated them high with a few rating theirs at medium. Since a significant number did not include any rating, this report is not including that aspect of responses. Items will be listed along with how many participants mentioned the same items.

- 8 Proper landscaping, garden with benches, possibly a columbarium in place of Parish House (note that the County Master Gardeners have offered to do the plans for the landscaping)
- 6 Meeting spaces that can be rented to generate revenue
- 6 Any new space should be aesthetically pleasing on the inside and outside
- 5 H/C accessibility in the historic church
- 5 Upgraded bathrooms, additional bathrooms, as needed
- 3 Shower for use by homeless men when hosted in the colder months
- 3 Washer and dryer to care for vesting garments and other items
- 3 Proper HVAC in either renovated or new space
- 3 Church library with comfortable table and chairs suitable for longer meetings, place to display historical artifacts
- 3 Paint exterior and interior of historic church, use white and cream on the interior
- 2 A hall large enough to accommodate the congregation
- 2 Work at maintaining the sanctity of any new space
- 2 Repair windows in sacristy and choir room
- 2 Renovate sink and cabinets in sacristy
- 2 Consider using solar panels in new construction
- 2 Use motion sensors when installing lighting to reduce energy consumption
- 2 Create safe, cost efficient, sustainable buildings
- 2 Audio/visual capabilities throughout the space with streaming potential
- 2 Elevated floor or moveable risers in hall to accommodate events or performances

- 2 Make sure kitchen and hall are on the ground floor
- 1 Involve more children, within and outside the church
- 1 Be sure to install a security system
- 1 Install a larger, more noticeable church sign that can include dates of events
- 1 Develop more useable space in the rectory
- 1 Be sure new space serves the various community groups

**QUESTION 7: FEELINGS ABOUT MOVING FORWARD TO ADDRESS THE ISSUE OF THE PARISH HOUSE**

	Interviews		Written		Overall	
Strongly Support	49	67%	16	62%	65	66%
Support	18	25%	8	31%	26	26%
Neutral	6	8%	2	8%	8	8%
Oppose	0	0%	0	0%	0	0%
Strongly Oppose	0	0%	0	0%	0	0%

This question was asked for the purpose of learning if study participants are in favor of addressing the issue of the aging Parish House. This question is not aimed at discovering what solution participants would support but simply to learn if they believe it is time to do something. This is a significant matter due to the fact that the parish reached this point of decision before and chose to make no decision as to forward movement.

The results of this study reveal that 92% of participants are supportive of moving forward to address the issue of the Parish House, 66% being strongly supportive and 26% being supportive. The other 8% are neutral. No participants were opposed to doing something.

These results suggest very strong support for moving forward to determine a solution to the issue of the Parish House. What that forward movement may be is the subject of the next question.

## QUESTION 8: WHICH OPTION YOU WOULD FAVOR THE MOST

	Interviews		Written		Overall	
Renovate Current Parish House	5	7%	2	8%	7	7%
Construct a New Parish Hall	66	0%	22	88%	88	90%
Neither	2	3%	1	4%	3	3%
No Response	1				1	

This question was asked for the purpose of learning which option participants favor, or if neither option presented is to their liking. Ninety percent (90%) of participants favored the option of constructing a new Parish Hall, while 7% favored renovating the current Parish House. Some of those who favored renovating the current Parish House included the caveat “if it can be done in a cost effective manner”. There were 3% who were neutral. These results lend very strong support to the option of moving forward with new construction. Some suggestions of how to go about the process along with some construction options are offered later in the study.

## QUESTION 9: RANGE OF POTENTIAL FINANCIAL SUPPORT

*Estimated commitments to a 3-year Capital Campaign  
(Numbers ending in 9 are rounded to next higher numbers)*

<i>Per Year Amount</i>	<i>Interviews</i>	<i>Written</i>	<i>Total</i>	<i>Total for 3 Years</i>		
				<i>Low Range</i>	<i>Med Range</i>	<i>High Range</i>
Above \$25,000	1	0	1	\$150,000*	\$150,000*	\$150,000
\$15,000–\$24,999	0	1	1	\$ 45,000	\$ 60,000	\$ 75,000
\$10,000–\$14,999	0	0	0	\$ 0	\$ 0	\$ 0
\$8,000–\$9,999	1	0	1	\$ 24,000	\$ 27,000	\$ 30,000
\$6,000–\$7,999	1	0	1	\$ 18,000	\$ 21,000	\$ 24,000
\$4,000–\$5,999	1	0	1	\$ 12,000	\$ 15,000	\$ 18,000
\$2,000–\$3,999	9	2	11	\$ 66,000	\$ 99,000	\$132,000
\$1,000–\$1,999	21	4	25	\$ 75,000	\$112,500	\$150,000
Less than \$1,000	12	9	21	\$ 0	\$ 31,500	\$ 63,000
Fixed Amount	1	1	2	\$ 4,000	\$ 4,000	\$ 4,000
No Giving to Campaign	6	2	8	\$ 0	\$ 0	\$ 0
No Response	0	2	2	\$ 0	\$ 0	\$ 0
<b>Total</b>	<b>53</b>	<b>21</b>	<b>74</b>	<b>\$394,000</b>	<b>\$ 520,000</b>	<b>\$646,000</b>

\* *Stated Amount*

This question was asked for the purpose of measuring potential contributions, if a project is initiated and a Capital Campaign is engaged. Though no firm commitments were registered at the time of the study, responses give an indication of possible financial support and can be used to determine the extent to which the proposed project may progress forward.

Of the 74 participating households, 72 offered a response of potential giving to a possible Capital Campaign. This is a positive response rate of 97%. Many churches average 75 – 90% of study participants who offer a range of potential giving. Of the 72 positive responses, 69 contained estimates within suggested ranges while 3 supplied stated or set amounts or targets for their giving. Where no response was given, there may yet be potential for a positive decision to be made.

Responses were measured within the ranges indicated, using the low, medium, and high extents of each range. Figures were also rounded up to even numbers to make estimates even numbers. Should a Capital Campaign move forward, estimated giving from study participants may be realized at the low range of \$394,000, the medium range of \$520,000, or the high range of \$646,000.

In order to determine a reasonable campaign goal from the data received, several factors should be considered. Historically, the medium range estimate is closest to what campaigns usually realize. In this case, that amount is \$520,000. Another factor to consider is that most successful campaigns raise between 1.5 and 3.0 times their annual pledged giving over the course of a 3-year campaign giving period. In the case of St. Peter's, the annual pledged amount is around \$230,000. The medium range of \$520,000 represents 2.26 times annual pledged giving, or right in the middle of that 1.5 to 3.0 range. Quite a few churches today find a range of 1.0 – 1.5 times giving as a projection at this point, so this is a positive response.

Another factor to consider is the 36 households yet to be heard from who did not participate in the study. While not all may contribute to a possible Capital Campaign, some will. The potential total of giving from this group may be used to support those who may give below the mid-point of the range they selected. Or, giving from this group may be conservatively estimated and added to the totals suggested by study responses. A conservative estimate could be gained by projecting that 60% of those yet to be heard from may participate this number being 22 households. If 11 of those households contribute within the range of \$1,000–\$1,999 and the other 11 contribute within the range of \$1000 or less, a mid-range projection of additional potential would be \$66,000.

For the purpose of this study, we will choose to remain conservative and use the potential giving from households yet to be heard from as support for the middle range estimate of \$520,000. This will supply more upside potential to this projection and less downside risk. This will also help to cover any change to current parish demographics that may fluctuate as families move in and out of the parish in the near future. Should the church desire a range for what may be realized in a possible Capital Campaign, a range of \$500,000–\$600,000 is most likely from the parish households.

When an entire project budget is formed, the amount contributed by the congregation is usually the key component in that budget. However, other sources of revenue inside and outside the church may play important roles in completing a budget. In the case of St. Peter's, other sources of revenue may exist inside and beyond the parish. These possibilities will be discussed later in this report.

**QUESTION 10: INTEREST IN CONTRIBUTING TOWARDS A SPECIFIC PROJECT ITEM, MEMORIAL OR HONORARY GIVING**

This question was posed to participants to learn of interest in making all or part of potential commitments towards a specific project item or giving in memory or honor of someone. Should there be sufficient interest in these options; choices for these types of giving may be developed in time for campaign commitments. Responses are as follows:

For a specific project item:

	Interviews		Written		Overall	
Yes	8	12%	2	8%	10	11%
Maybe	18	28%	11	46%	29	33%
No	39	60%	11	46%	50	56%
No Response	8		2		10	

In honor or memory of someone:

	Interviews		Written		Overall	
Yes	12	17%	7	28%	19	20%
Maybe	18	25%	7	28%	25	26%
No	42	58%	11	44%	53	55%
No Response	1		1		2	

While slightly more than half of participants have no particular interest in these options, there is sufficient interest from an average of about 45% of participants to develop and include choices of giving towards specific items or memorial and honorary giving options in a Capital Campaign. A number of participants have already identified those they would like to memorialize. Sometimes several family units, whether within or from outside the congregation, join together to take part in this type of contribution to the project. Given this level of interest, it would be wise to include a variety of options should a Capital Campaign be engaged.

**QUESTION 11: SUPPORT FOR MORE THAN ONE 3-YEAR GIVING PERIOD IF NEEDED**

	Interviews		Written		Overall	
Strongly Support	15	21%	3	12%	18	18%
Support	32	44%	15	60%	47	48%
Neutral	18	25%	6	24%	24	24%
Oppose	6	8%	0	0%	6	6%
Strongly Oppose	2	3%	1	4%	3	3%
No Response			1			

This question was asked for the purpose of learning how members may feel if more than one 3-year giving period would be necessary to attain the goal decided upon in a capital project. Churches that engage in major projects often plan on more than one giving period in order to pay off the project or pay down any remaining debt to a feasible mortgage balance. A major project is often defined as one which exceeds three times the amount of annual pledged revenue.

Estimates presented for both options exceed that amount in this case. So it may be an option to consider more than one giving period. It is often wise to measure a congregation's willingness to consider such an option at this stage of the process rather than waiting until a project is underway and other options have been eliminated. In this case, 66% of participants would favor more than one giving period if necessary to reach the financial goal. This includes 18% who strongly support this option and 48% who are supportive. There are 24% who are neutral on this option, while 9% are opposed.

This would suggest support for this option, if needed. Depending on circumstances and the final plan details for moving forward, even stronger support for this option may be gained if it is an option that is required.

**QUESTION 12: WILLING TO ASSIST WITH CAMPAIGN COMMITTEE WORK OR TASKS**

Study participants were asked if they would be willing to help with the work of a Capital Campaign if that process moves forward. If willing, they were also asked about specific areas of interest. Results are as follows:

	Interviews		Written		Overall	
Yes	26	36%	9	35%	35	35%
Maybe	30	41%	7	27%	37	37%
No	17	23%	10	38%	27	27%

Areas of interest:

Overall planning	11
Communications	20
Prayer	22
Literature preparation	19
Youth and Children	6
Visitation	4
Event planning	21
Prepare mailings	33
Other, anywhere needed	18

Some of the other areas of assistance include:

- Seeking support from community sources
- Marketing
- Presenting planned giving options
- Grant writing
- Audio/visual engineering
- Food safety advice
- Kitchen design assistance
- Finding non-profit funding sources

A majority of study participants, 72%, said they would be, or may be, willing to help with the work of a Capital Campaign. A number of those who declined assisting in this area have physical limitations preventing them from doing so. A breakdown of interests in specific areas of service is included above. It should be noted that some participants indicated interest in more than one area.



These responses show that more than enough volunteer assistance is available to staff a Capital Campaign effort, if a campaign is engaged. In fact, such a strong response is often an indication that participants are expecting that a project will take place and a campaign be engaged. Members are seldom so strongly moved to volunteer for something they do not believe will occur. A list of names will be supplied to the Vestry.

### **QUESTION 13: ANY FURTHER COMMENTS, SUGGESTIONS, IDEAS, OR CONCERNS**

This question was meant to offer participants a final opportunity to comment on any aspect of the proposed options or a possible Capital Campaign. This includes comments, suggestions, ideas, or any concerns. While all input offered is of value, the purpose of the study is to measure leading trends of thought. Therefore, those responses given by 3 or more participants are included in this report, along with the number of participants who made similar statements. The Vestry will have the option of reviewing the 43 additional comments, if they wish.

- 19 The Parish House is very old, is not H/C accessible, no longer meets our needs, and needs a new kitchen. Attempting to renovate it will uncover many more problems. That would be throwing good money after bad.
- 19 Consider modular construction for a new Parish Hall. That could cost significantly less, be an easier process, and meet our needs well. The nearby Church of God has modular buildings we could view as examples.
- 19 Work hard to find additional sources of revenue including the Springsteen Foundation, Bon Jovi, the Historical Society grants to help preserve the church if we take down the Parish House, other local support, state grants, and possibly the Diocese for funding.
- 15 We have talked about this before. It is time to do this. It must be done this time. It has to be done. We are all for it.
- 12 Do not know if the financial support is here to do this project, this is a big stretch for us.
- 6 Do as much as possible, even if we have to take a loan, as it will cost more later. Do it right the first time. I support a modest mortgage in order to do as much as possible.
- 6 The Thrift Shop could produce more income than it does. Consider opening it more hours when more people are available to shop. Use paid employees. Add an eBay component to get better prices on higher end merchandise that is donated.
- 6 Some sort of covered connection will be needed from the church to a new Parish Hall for the children and the rest of us to get to coffee hour.
- 5 H/C accessibility is important to both the congregation and those of the community who use our facility for occasions such as the community picnic and the feeding programs.

- 5 We need to address specific maintenance items to the church in equal measure as this project, such as painting the interior and exterior.
- 5 Do the project in phases as we are financially able.
- 5 Let us focus on a new building as a Community Center as opposed to a Parish Hall. This will send a message and may garner more community support in usage and financially.
- 4 Consider legacy gifts as a way to underwrite any mortgage we may need.
- 4 Be sure to have the demolition team well insured and have them be very careful.
- 3 We need a commercial kitchen to maintain our service to the community.
- 3 We should re-use what items we can from the current Parish House, possibly some kitchen items.
- 3 We anticipate that when the new project budget is considered, it may open a discussion of the size of the music line item in our operating budget. We should discuss if it can be modified to help with this project.
- 3 Concerned that the campaign will consume the church's life and energy, leaving too few volunteers to carry on the rest of the work.
- 3 How much rental income is it realistic to expect in light of town ordinances?

### **III. Observations, Conclusions, Recommendations**

#### *OBSERVATIONS*

Definition: Observations are based on comments, suggestions, impressions, and various written materials reviewed, along with an interpretation based on our previous experience. The following observations were noted during this study:

- 1. St. Peter's Church is guided by leaders who care about their church, its future, and the well-being of its members. Father Dirk has been especially well received. His style of leadership and caring manner for members is much appreciated. Members feel he is the right leader to guide the parish through a major project.
- 2. St. Peter's Church has a loyal core of long-time members who love their church, its ministry, the community outreach, and each other. For many, the church is the hub of their social relationships and source of their spiritual encouragement. For others, the church represents an important connection to family as they have worshipped there for multiple generations.
- 3. The downtown location of the church has done much to define the congregation in light of not only their outreach to the needy, but also their connection to the culture of

the community. Music and other cultural gatherings, use by support groups, and just the historical significance of the structure have afforded St. Peter's an opportunity to make an impact on many aspects of the Freehold community.

4. There are numerous ideas of ways in which St. Peter's may become more involved with the community, if the limitations of the facilities can be successfully overcome.
5. There is some sense of urgency to move forward with addressing the aging Parish House. The matter has been discussed before. Previous solutions were abandoned due to prohibitive costs. Many believe a solution must be found this time.
6. The primary concern has to do with affording whatever solution may be adopted. There are some who believe that more affordable options exist compared to proposed estimates. It is also believed that there are additional sources of revenue to be found beyond the parish. It is hoped that a combination of these suggestions may result in a solution that can resolve the challenges represented by the current Parish House.
7. Along with the prospect of solving the issues of the Parish House, some attention was also given to the importance of maintaining the current historic church building. This building is seen as the true treasure of the campus. The question of its H/C accessibility is on the minds of some members.
8. While the prospect of moving forward gives place to a number of very real concerns, the level of participation in the study, the number of members willing to share in the work of a Capital Campaign, and the depth of thought apparent in responses indicates an investment of time and commitment on the part of parish members indicative of a congregation ready to move forward, be it ever so carefully.

## *CONCLUSIONS*

Definition: Conclusions are based on direct interpretation of personal interviews and written surveys. After analysis, study, and prayer, the following conclusions have been reached:

1. This study began with a desire on the part of the Vestry to gather input from parish members regarding proposed solutions to the matter of an aging Parish House that no longer meets the needs of the congregation's ministries and outreach. The Campaign Vision Team spent several months developing some proposals to place before the parish for their consideration and feedback. An Assessment Study was developed as the tool by which to gather those responses.

2. A participation goal for the study was set at 50% of all financially supportive households, both pledging and non-pledging. Study results are more strongly validated when the level of participation exceeds a simple majority of supporting households. As 110 households currently fit this definition, the goal was set at 55. A total of 74 households actually participated in the Assessment, which is a full two thirds, 67%, of the target group. This included members of 53 households who were personally interviewed while 21 sent in written responses. A total of 99 people participated, including 73 who were interviewed. Participation at this level is quite helpful in determining how to proceed with a project.
3. A significant number of members have a history with the church that spans more than 20 years. Quite a few have spent their entire lives as part of this congregation. While this group supplies the church a strong central core, there are also indications of new families joining the church. Twenty-two percent (22%) of study participants have been in the church for 10 years or less, and 14% for 5 years or less.
4. About 90% of participants believe the church is serving its members well. This would contribute to the fact that 82% see themselves involved in the church at some level. While there are always areas that may be improved, study participants expressed many more positive opinions of their church than negatives. There is currently a positive attitude and spirit at St. Peter's.
5. Focusing on the proposed options to address the Parish House, 89% had a satisfactory level of understanding of the details as presented. When asked to prioritize the primary items involved with those proposals, H/C accessibility and a commercial grade kitchen topped the list. The rest of the items were somewhat closely ranked a little lower than the top two. A number of additional items were suggested, including some additional features and some maintenance items on the current historic church.
6. Regarding participants' feelings about moving forward to address the issue of the Parish House, 92% are in favor of doing so. The rest hold a neutral view with no one opposed. There were 90% who favor construction of a new Parish Hall while, 7% lean towards renovating the current Parish House.
7. Potential contributions to the project extended from a low range estimate of \$394,000 to a medium range estimate of \$520,000 to a high range estimate of \$646,000. As the medium range estimate is usually closest to the amount a campaign realizes, a conservative campaign goal would be within a range of \$500,000 to \$600,000 over a 3-year giving period. This projection takes into consideration that 33% of church

households have yet to respond. It also bears in mind that not all households may contribute at the middle of the range they selected. Not included in the projection are any funds that may be raised outside of the congregation from community sources and grants.

8. Slightly less than 50% of participants expressed interest in considering contributions for specific project items or in making honorary or memorial contributions. Sixty-six percent (66%) would also be supportive of more than one 3-year campaign giving period, if needed to reach the project goal. If a Capital Campaign is engaged, 72 of the 99 participants said they would be willing to assist with campaign tasks. There would be plenty of volunteers to run a successful campaign and assist with many specific tasks.
9. Participants took the opportunity to offer 62 additional comments, suggestions, ideas, or concerns. Those mentioned by three or more participants are included in the study text. The top four had to do with the fact that, even if renovated, the current Parish House would still not meet the needs of the congregation; modular construction should be considered for new construction to significantly lower the proposed estimate; strong efforts at locating and securing outside funding should be made; and this project has been discussed before and needs to be done this time.
10. Summing up the conclusions, a strong majority of participants are ready to move forward in addressing the Parish House issue. They are pretty much in agreement as to the direction they prefer regarding a solution, and are willing to contribute financially. They do have some promising suggestions to consider as far as variations to the options presented. And they are willing to be involved in the campaign process including seeking possible outside funding. Though some project details and costs must be established, the goal of learning how the congregation feels has been met.
11. Finally, in order to bring some clarity to the matter of moving forward with all study information in mind, the following steps may be considered:
  - A. A high level estimate of \$1.8-\$1.9 million has been estimated for construction of a new Parish Hall, removal of the current Parish house, and landscaping of grounds. An investigation of alternative construction methods, including modular construction, has been suggested in order to reduce the overall project budget.
  - B. In order to establish a project budget, the congregation has offered estimates of giving allowing a projection of \$500,000 to \$600,000 as a campaign goal over a 3-year giving period. A majority of study participants favored more than one

3-year giving period, if needed to achieve a project goal. A second giving period will usually generate 60% to 80% of the initial giving period. This would translate into an additional \$312,000 to \$416,000 in potential giving based on the medium range study estimate, suggesting that as much as \$800,000 to \$1 million might be generated from within the church if two giving periods were employed. In addition to campaign giving, funding sources outside the church may be found. While this area of funding is often limited, the fact that St. Peter's plays such an active role in serving the community may increase possibilities. Another factor is the preservation of the historic church. One more factor is increasing revenues available to support a mortgage, such as examining the possibility of increasing revenues of the Thrift Shop or rentals of the Keith Building. Together, there are a number of possibilities to support a strong financial plan.

- C. A project plan may also include a phased approach. An approach may include such options as constructing a new Parish Hall in steps, a one-story building with a kitchen and hall to begin, with an option to add a second level later. The current Parish House could be maintained until a second level was added. Or, a two-level Parish Hall could be constructed, the current Parish House dismantled, and grass be planted until a garden area could be added later. The point is that a number of scenarios exist as construction options are married to financial resources in a way that progress is made in the most responsible and beneficial manners.

## *RECOMMENDATIONS*

Definition: Recommendations are based on our observations and conclusions. The following recommendations are respectfully submitted:

1. Based on the level of information gathered in the study, we recommend a summary report of the results be shared with the entire congregation. We suggest a verbal report be arranged, along with a distribution of the summary section. The entire report can be made available electronically for those who may be interested in details. Hard copies can be produced for those who may not have internet access. This step will maintain an ongoing sense of open communication throughout the process.
2. Since forward progress to address a project is strongly supported, we recommend that leaders set a course of action. This course of action may include activity in several directions at the same time.

- A. First, we would recommend investigation into construction options. It is possible that suggestions offered in the study may lead to a lower project budget. Suggestions included alternate sizes of a project along with alternate construction methods such as modular or steel framing.
  - B. Second, we would recommend that project timetable options be determined. A phased approach to the project may help decide how to proceed as funds become available. It will also be helpful to determine which level of professional guidance is needed to explore these options in light of local regulations. For example, a one-level new building could be constructed housing a kitchen, hall, rest rooms, with provision for stairs and an elevator should a second floor eventually be added as needed, or when funds are available.
  - C. Third, we recommend that a Capital Campaign be planned with components for both congregational giving and seeking funds beyond the church. Regardless of exactly when the plans to proceed with construction will be ready, funds will need to be available.
  - D. Fourth, we recommend an examination of the annual budget to learn of any capacity to support a project mortgage. The suggestion of looking to expand Thrift Shop earnings could be part of this step. This step would supply an answer to the question of servicing any type of loan should that option need to be considered. We recommend that these steps begin in close succession, as conducting them one after the other could extend the timeframe of a project well beyond the point where momentum has been initiated. If too much time is taken before progress is made, the effort could stall.
3. As the projected plan for implementation of projects will depend highly on actual campaign commitments and anticipated cash flow, we recommend that the planning of the campaign be implemented, as soon as possible, in conjunction with Recommendation 2. Basic campaign steps may be put in place so efforts are ready to kick off when project details are determined and a firm budget is established.
  4. As part of any campaign process, we suggest helping the congregation to understand a broad spectrum of ways to contribute, including creative methods of giving, memorial and honorary opportunities. A variety of giving choices will encourage a greater level of participation through a broader appeal. This approach will also reduce the stress associated with an additional request for contributions. Those with limited incomes may learn of non-cash ways to contribute so that they may be part of the effort and not feel excluded. These features can be easily woven into the campaign process.

5. Following the receiving of commitments, cash flow can be determined based on how households decide to make their contributions. Together with outside monies that may be raised, the full extent of a project or any phasing may then be fully determined and set in motion.
6. If church leaders accept the recommendation to proceed, campaign planning can run concurrently with project planning and can begin as soon as possible. If campaign planning gets underway before summer is passed, a fall kickoff may be possible. Contributions could commence before the end of the year. This would be very positive for those wishing to take advantage of tax consequences.
7. As all aspects of planning move forward, we recommend that regular updates be communicated to the congregation. A clear picture of progress is of utmost importance. Accounting of any campaign amounts committed, received, and spent should be noted along with attention to items completed. This will maintain trust in leadership and momentum in project giving throughout the commitment period. As a project moves forward, a reiteration of benefits gained and their importance may prove helpful in maintaining enthusiasm and sense of purpose.
8. Kirby-Smith is familiar with the project, the community, and all data gathered. We are prepared to guide St. Peter's Church through a Capital Campaign process. While some members may be concerned over the cost of professional guidance, churches are not often equipped to navigate a major fundraising effort alone. Results show that churches conducting campaigns by themselves raise 50–60% as opposed to when they use professional guidance. Members are more comfortable discussing their giving with an outsider than with fellow parish members and appreciate creative ideas for making contributions. Increased results quickly absorb costs associated with such assistance.
9. Results of the study indicate support for a project and a willingness to support it financially. Our recommendation is to proceed, as soon as possible, so as not to lose momentum established by the study process.



#### **IV. Summary**

Father Dirk and the Capital Visioning Team are to be thanked for their time, efforts, and prayers in preparing for this very important step. Options to address the issue of the Parish House were placed before the congregation for their feedback, along with an opportunity to submit their own comments and ideas.

In order to make study results viable, a participation goal of 50% of regularly contributing church households was established. As 110 households contribute on a regular basis, the goal was set at 55 households. A total 74 households participated including a total of 99 members. There were 73 members, representing 53 households, who were part of the interview process.

Sixty-one percent (61%) of participants have been part of the church for 20 years or more, while 22% have been attending for 10 years or less, and 14% for 5 years or less. This points to a need to add new members but also shows that new members have been joining St. Peter's. Ninety percent (90%) believe the church is serving its members well and 82% consider themselves involved in church activities at some level. This compares to a national average of 60% seeing themselves involved in their churches.

Eighty-nine percent (89%) of participants had a sufficient understanding of the options presented to address the issue of the Parish House. When asked to prioritize the primary items involved with the proposals, H/C accessibility and a commercial grade kitchen topped the list. The rest of the items were closely ranked a little lower than the top two.

Ninety-two percent (92%) of participants are in favor of moving forward to address the issue of the Parish House, with 90% in favor of new construction as the best solution. There were 97% of participants who offered an estimate of potential financial support. Those estimates amounted to a low range of \$394,000, a medium range of \$520,000, and a high range of \$646,000. As the medium range is usually closest to the amount raised in a campaign and considering that one-third of the congregation has yet to be heard from, a conservative campaign goal would be in the range of \$500,000 to \$600,000 over a 3-year giving period. Not included in this projection are any funds that may be obtained from sources outside the congregation.

An average of 45% of participants would be interested in seeing options to contribute toward specific project items or to contribute in honor or memory of a loved one. Sixty-six percent (66%) would favor more than one 3-year giving period, if that option would be needed to achieve the project goal. There were 72 of 99 participants who said they would or may be willing to assist with campaign tasks should a Capital Campaign be engaged. This assures that sufficient volunteer labor is available and suggests members are anticipating a campaign will take place.

Given an opportunity to share final comments, suggestions, ideas, or concerns, participants' primary thoughts had to do with the belief that the current Parish House would still not meet the church's needs, even if renovated; modular construction should be considered as an option for the construction of new space; strong efforts should be made to seek and secure funding beyond the congregation; and the project must be done this time, having been discussed a number of times before.

It is recommended that the church presents the findings of the study to members during a forum after services, accompanied by a copy of the study summary. Full versions of the study may be made available online or by hard copies to those without internet access.

Based on the positive results, it is recommended that leaders develop plans to move forward including an investigation of construction options aimed at lowering the project budget, an overall plan including phased options if needed, a Capital Campaign to generate funding from members and beyond the church, and an examination of the current budget and options to increase revenue to learn, if a mortgage could be supported should that option be considered. We recommend that steps moving forward be conducted simultaneously so as to move the project forward in a timely fashion and not lose momentum generated by this study. A number of scenarios are presented in the Conclusions portion of the study showing how costs may be reduced, revenues may be generated from multiple sources, and a project may be phased, if necessary, in order to marry plans with resources. As progress moves forward, the best method of addressing the project will present itself in a way that will resolve the matter in the wisest manner.

Since a relationship with Kirby-Smith Associates has been established through the Assessment Study process, it is recommended that professional guidance for a Capital Campaign be retained. This will ensure that preparations will proceed in a timely manner, volunteers will be equipped for their tasks, the broadest scope of ideas for contributing will be made available, and results can be realized in a timely fashion so a project can move forward in a timely fashion.

A final word of thanks is extended to all those who made time in their schedules to participate in the study. Your help was appreciated and key to the success of this study. Thank you!

## **V. Thank you**

It is with great appreciation that we thank you for allowing Kirby-Smith Associates to assist you with this Assessment Study. A special note of thanks is extended to Father Dirk and the Capital Visioning Team. Their hours of planning, preparation, and communication were key to the success of the study, as well as the commendable level of participation by members.

As a decision to proceed is made, Kirby-Smith Associates would be honored to conduct a Capital Campaign for St. Peter's Church. We will work with you, exerting the same diligence and care to design and conduct a campaign that will achieve the highest level of your potential. Advantages to professional guidance include presenting many options for giving, including *Creative Ways to Give*, and assisting with making sure all households are contacted. Churches guided through Capital Campaigns consistently raise more funds and experience fewer problems with the process than those who attempt a major fundraiser by themselves. Again, thank you very much. It has been a distinct pleasure to serve you. We will join you in prayer for the success of your journey. God bless you.