



Feasibility Study for  
Viability of a Visitation School Capital Campaign  
2023

Prepared by





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## Foreword

Rozanne Prather Consulting appreciates the opportunity to work with the staff and members of the Visitation Parish and School community in determining the feasibility of a successful campaign to expand and improve the school campus. Many have dedicated their time and talents over the last few years to plan for the future of the school campus.

Special thanks to Fr. Greg Haskamp, current pastor of Visitation parish; former pastor Msgr. Brad Offutt; Megan Burdolski, Director of Stewardship; and the Feasibility Study Task Force Committee which includes Lindsey Anderson, Megan Burdolski, Mary Kallman, Conor Kelly, and Don Lueke. Their leadership, knowledge, and guidance contributed to a successful feasibility study process.

We are grateful to all of the study participants in the 1:1 personal interviews, focus groups, and online survey, for sharing their thoughtful insights, observations, and vision to improve and expand the Visitation School campus.

## The Study

In early 2023, Visitation Parish contracted with Rozanne Prather Consulting to test support for a possible campaign to fund the improvement and expansion of the school campus and to assess the strength of its organizational stewardship and fundraising which included:

1. Engaging a task force to assess fundraising potential and to guide the study process.
2. Crafting a compelling case for support (*Attachment A*) and educating parishioners about the proposed plans.
3. Identifying individuals with the potential to serve as lead contributors (*Attachment K*) and volunteers (*Attachment J*) in a campaign and suggested roles. (*Attachment O*).
4. Gathering parishioner insight, sentiments, and perceptions of the proposed plans.
5. Assessing the level of financial support that may be anticipated in a campaign.
6. Accessing organizational data to support a philanthropic trend analysis of recent and historical parishioner giving.
7. Recommending key strategies to support a successful capital campaign.
8. Developing a campaign timeline (*Attachment Q*) that outlines prospect identification, volunteer engagement, parish donor cultivation and solicitation, and community support.
9. Providing data related to enrollment trends at Visitation School, the Diocese of Kansas City-St. Joseph, and nationally (*Attachment P*).

230 people participated in the feasibility study from March to June 2023. In this period, Rozanne Prather Consulting:

1. Conducted personal interviews with 24 engaged supporters (*Attachment B*) over the course of 14 individual meetings. These individuals were identified as highly involved or invested leaders, donors, and/or volunteers in the Visitation Parish and/or School community.
2. Developed content for the survey instrument (*Attachment C*) used to capture input of personal interview and online survey participants.



3. Facilitated two parish focus groups comprised of 11 volunteer leaders and supporters (*Attachment D*).
4. Developed the questions/content (*Attachment E*) to guide the focus group discussion.
5. Compiled the qualitative data from the focus group sessions (*Attachment F*).
6. Captured quantitative data from an online survey tool which is presented in the following feasibility study report. Additionally, the survey captured more than 100 pages of qualitative responses; and prepared a summary of the responses (*Attachment G*).
7. Developed the content for a focus group comprised of Visitation School teachers and staff (*Attachment H*).
8. Developed the content for an online survey instrument (*Attachment I*) for accessible to all Visitation School teachers and staff.
9. Captured recommendations for campaign leaders and committee volunteers (*Attachment J*).
10. Generated a list of potential lead donors to the campaign (*Attachment K*).
11. Conducted personal interviews with top financial contributors to Visitation Church to learn of their insights and to assess support for the proposed capital project. (*Attachments L1-L3*).
12. Researched public sources and conferred with the Diocese of Kansas City-St. Joseph to identify any capital campaigns in progress or in the planning stages that could potentially impact a fundraising campaign at Visitation Parish. (*Attachment M*).
13. Developed a preliminary organizational chart to illustrate how a potential campaign may be successfully organized and implemented at Visitation (*Attachment N*).
14. Developed an outline of potential campaign volunteer roles for the parish's consideration that would best support a successful campaign (*Attachment O*).
15. Compiled historical enrollment data for Visitation School and researched national enrollment trends in Catholic education (*Attachment P*).
16. Developed a campaign planning timeline (*Attachment Q*).

The feasibility study findings and recommendations are based on:

- an assessment of participant feedback,
- current and historical giving data, and
- trends and best practices for testing the viability of a successful campaign.



## Feasibility Study Findings

The following findings summarize the quantitative and qualitative data collected in Visitation Parish's feasibility study. Overall, 230 individuals participated in this portion of the feasibility study during the months of March through June 2023. The responses below have been compiled from the following sources:

- Interviews with 24 individuals who were identified as being among the most highly engaged leaders, volunteers, and influencers in the parish and school community.
- 2 focus groups with 11 volunteer leaders and supporters, including representatives from the parish council, school board, finance council, facilities council, and PTO.
- An anonymous online survey in which 227 individuals shared qualitative and quantitative data about their perceptions, experiences, thoughts, and the likelihood and level of support should the parish launch a capital campaign for school improvements.

To note: some study participants opted not to respond to all of the questions and/or gave incomplete answers. As a result, the total quantitative responses for each question vary. Additionally, the number of qualitative responses from the focus groups are not tabulated in the aggregate data. Percent responses are calculated based on the number of respondents who completed each question, not on the total number of study participants.

A selection of associated comments is listed below each finding. More than 100 pages of comments were submitted by study participants and a summary can be found in Summary of Qualitative Survey Responses (*Attachment G*).

Participants assigned a value to opinions shared in the survey, ranging from Very or Somewhat Affirmative, to Neutral, to Very or Somewhat Negative. Participants could also opt to skip questions and/or to offer comments after each question.



**Question 1**

At the onset of the feasibility study interviews and online surveys, participants were asked to identify their relationship with Visitation Parish.

**225 Responses**

Response Selection	Response Count	Response Frequency
Parishioner	208	92.4%
Parent or relative of a current student(s)	97	43.1%
Parent or relative of a former student(s)	76	33.8%
Former student/graduate of Visitation School	33	14.7%
Staff member of parish or the school	11	4.9%
School or parish volunteer	69	30.7%
Parent of Future Student	2	.4%
Former Teacher/Staff	1	.4%

**Question 2**

Participants were asked to rate the effectiveness of Visitation Parish in meeting their spiritual needs. Overwhelmingly, parishioners responded favorably, nearly 89% stating that the parish was Somewhat or Very Effective in meeting their spiritual needs.

**225 Responses**

Response Selection	Response Count	Response Frequency
Very effective at meeting spiritual needs	135	60%
Somewhat effective at meeting spiritual needs	65	28.9%
Neutral	12	5.3%
Not effective at meeting spiritual needs	4	1.8%
Not at all effective at meeting spiritual needs	0	0%
Opted to skip this question.	9	4%

**Comments regarding Visitation Church's effectiveness in living out its mission:**

*Visitation is a vibrant community of faith.*

*Many of our school families are great examples to their children. Parents lead service projects that involve their children, though it would be nice to see more families attending weekend Mass.*

*Vis provides opportunities for spiritual growth through Masses and the sacraments.*



**Question 3**

Participants were asked how effective Visitation School is in fulfilling its mission of striving for academic excellence in a Christ-centered environment; providing quality spiritual, moral, and social development for the young people served; cultivating and sharing Catholic values, knowledge, and culture with a spirit of mutual respect, responsibility, and love.

Nearly 45% of respondents stated that the school is Very Effective in living out its mission; and nearly 35% state it is Somewhat Effective.

**225 Responses**

Response Selection	Response Count	Response Frequency
Very effective at fulfilling the school’s mission	101	44.9%
Somewhat effective at fulfilling the school’s mission	78	34.7%
Neutral	21	9.3%
Not effective at fulfilling the school’s mission	4	1.8%
Not at all effective at fulfilling the school’s mission	1	.4%
Opted to skip this question.	20	8.9%

**While these cumulative ratings were generally positive, participants shared both praise and concerns in the qualitative comments that centered on four areas:**

**Enrollment/Retaining Students and Families:**

*We have a real problem retaining families and teachers. The school enrollment is continuing to reduce, and we are unable to provide the support and competitive pay structure and benefits package to keep our teachers.*

*Communication can be an issue at the school. We've lost some very good teachers recently.*

**Teacher Retention:**

*We have had a great experience at the school but I am quite concerned with the rate of attrition of great teachers at the school. Buildings don't matter if we can't keep our great teachers in the building.*

*I am concerned that frequent staff turnover at the school inhibits the full potential for "academic excellence" that is part of the mission.*



**Academics:**

*We need to focus on the core subjects so students are ready for high school.*

*The school does not devote enough hours to core academics: math, science, language arts, religion; too much time and effort goes into "specials" and societal topics.*

**Parish and School Community:**

*I think we could do a stronger job of joining school and church efforts for a more unified Visitation community. This responsibility lies in the hands of all members and not just leadership.*

*We appreciate the Junior board, service opportunities, weekly mass, stations of the cross, daily prayer. Would love to see more daily religion classes and catholicity taught joyfully while inspiring students to love themselves so they can go out into the world and love others. It should be "cool to be catholic."*

*The school staff and administration do as best they can to live out the mission but are lacking in parental support. It's easy for parents to get distracted with the needs and desires of their individual child and fail to think about the Christ-like and inclusive community we are trying to build for all Visitation families.*

**Question 4**

Survey participants were asked to rate the image of Visitation School in the community. About 43% stated that they perceived the school to have a very favorable image, and 40% rated the image as somewhat favorable.

**224 Responses**

Response Selection	Response Count	Response Frequency
Very favorable image	97	43.3%
Somewhat favorable image	90	40.2%
Neutral	21	9.4%
Not favorable image	8	3.6%
Not at all favorable image	1	.4%
Opted to skip this question.	7	3.1%

**Comments regarding the image of Visitation Church:**

*Strong sense of generosity and a commitment to the greater community.*

*I think a lot of outsiders view the parish as full of "entitled" and somewhat snobbish people, which I think is judging a book by its cover. Most people would be hard-pressed to find a closer, more supportive community.*





**Comments regarding the image of Visitation School:**

*I think the inability to retain current families in our small geographical community where everyone knows one another has been detrimental to our image.*

*When people are looking for schools, Visitation is among the top 3 or 4. St. Paul's and Pembroke are options, but Visitation serves an important role by offering a Catholic education.*

**Question 5**

Participants were asked to state the value they place on Visitation Parish having a school. Of all survey questions, this one demonstrated the exceptional value the community places on its ministry of educating students. Nearly 93% of respondents stated that the school is a highly valued ministry.

**225 Responses**

Response Selection	Response Count	Response Frequency
School ministry is highly valued	209	92.9%
School ministry is somewhat valued	12	5.3%
Neutral	2	.9%
School ministry is not valued	1	.4%
School ministry is not all valued	0	0%
Opted to skip this question.	1	.4%

**Question 6**

Participants were asked to share what motivates their support of Visitation School. 150 individuals responded with values statements, with the majority related to the importance of passing on the Catholic faith to their children or grandchildren and the young people of the parish. Additionally, there was strong sentiment around the school as a means for building community and strengthening the long-term viability of the parish.

**150 responses about motivation to support Visitation School:**

*Both the parish and school provide my family with a wonderful Christ-centered community, and this is what motivates our support.*

*We want a strong church and school for our neighborhood.*

*I've been here my whole life - and the Eucharist keeps me coming back every week. My children, parents, this community - it means everything to me.*



**Question 7**

Visitation Parish has most recently been led by Msgr. Brad Offutt (thru June 30, 2023) and lay leaders from a variety of ministries that contribute to a vibrant and financially sound community. Fr. Greg Haskamp began his tenure at the parish on July 1, 2023. Among the parish leadership are the Parish Council, Facilities Committee, and Finance Committee. Visitation School leaders include Principal Mary Kallman, the School Board, and the School Finance Council.

Participants were asked to share their level of confidence in these leaders (serving prior to 7-1-23) to make wise decisions regarding the direction and operations of Visitation Parish and School.

**225 Responses**

Response Selection	Response Count	Response Frequency
Very confident in parish & school leadership	84	37.3%
Somewhat confident in parish & school leadership	86	38.2%
Neutral	28	12.4%
Not confident in parish & school leadership	16	7.1%
Not at all confident in parish & school leadership	3	1.3%
Opted to skip this question.	8	3.6%

About 37% of respondents stated that they are Very Confident and 38% are Somewhat Confident in parish and school leadership to make wise decisions regarding the direction and operations of the parish and school. While this constitutes a consensus of general satisfaction, participants shared concerns around school communications, school staffing/retention challenges, and general vision and leadership to ensure growth and sustainability.

**Comments regarding parish and school leadership:**

*I feel that everyone is aware of the current issues with families and teachers leaving our community for other schools, however, there has been no communication from leadership on what plans are in place to change this trend.*

*Our parish, facilities, and finance committees are outstanding.*

*I strongly believe in the dedication of our leaders. They are confronted with many challenging issues, questions and problems vying for time, attention, and resources. I'm hopeful this survey will help prioritize those topics for the leadership in place.*

**Question 8**

Participants were questioned about their potential support of Visitation School enhancing its campus through a capital campaign. Of 225 responses, 85% stated that they were Very or Somewhat Supportive



of an endeavor to pursue capital improvements to better serve current and future students and the greater parish community.

**225 Responses**

Response Selection	Response Count	Response Frequency
Very supportive of Visitation School pursuing capital improvements	144	64%
Somewhat supportive of Visitation School pursuing capital improvements	48	21.3%
Neutral	21	9.3%
Not supportive of Visitation School pursuing capital improvements	8	3.6%
Not at all supportive of Visitation School pursuing capital improvements	3	1.3%
Opted to skip this question.	1	.4%

**Comments regarding capital improvements to the school campus:**

*I am all for improving the physical facilities of the school, but that does us no good if we cannot attract and retain quality teachers. If we do not have quality teachers and a solid plan and direction of the school, we will have families jump ship for other communities.*

*The benefits of an early childhood center are a great idea. Before anything happens, we would like a business plan to determine the ROI on an ECC to make sure it's profitable.*

*This is no small endeavor, and we are going to need major donors to accomplish this. We will need to know that we have that level of support before moving on this.*

*Improvements are essential to Visitation's viability in the community, and the ability to stay current with education "trends."*

**Question 9**

Participants were asked what they perceived to be the greatest advantages to Visitation pursuing capital improvements to its school facilities. 149 individuals responded to this question, with the top three advantages related to:

- Ensuring the school and academic offerings are up-to-date and relevant to today's academic environment and marketplace.
- Developing an overall better campus that attracts students, families, and educators to the parish and community.
- Building upon and strengthening the generational legacy and future viability of Visitation Parish, with Visitation School serving as an anchor in the community.



**Question 10**

Participants were asked what they perceived to be the greatest disadvantages to Visitation pursuing capital improvements to its school facilities. 125 individuals responded to this question, with the top three disadvantages related to:

- Cost and impact on parish finances (debt and operating costs).
- General concerns with quality of academics and catechesis; growth in enrollment; and development, compensation, and retention of faculty.
- Though short-term, there are concerns about disruption or displacement during construction.

**Question 11**

Survey participants were asked about their support of a fee-based Early Childhood Center (ECC) (daycare/preschool) at Visitation. A key goal for this initiative is to develop a self-sustaining, viable revenue source for school operations and a "feeder" system for prospective Visitation students and families. The proposed site would be in the new 3-story school addition in Phase II of the master plan.

Again, participants expressed positive support, with 85% stating that they were Very or Somewhat Favorable of this proposed initiative. This question also generated significant feedback, with nearly half of the respondents adding comments or concerns most of which related to the great need/benefit for childcare/early learning; and ensuring the ECC has been properly vetted for the marketplace, staffing needs, and ROI.

**225 Responses**

Response Selection	Response Count	Response Frequency
Very supportive of an ECC at Visitation	155	68.9%
Somewhat supportive of an ECC at Visitation	37	16.5%
Neutral	14	6.2%
Not supportive of an ECC at Visitation	11	4.9%
Not at all supportive of an ECC at Visitation	5	2.2%
Opted to skip this question.	3	1.3%

**Comments about the early childhood center option:**

*If the ROI is there, it would be very beneficial.*

*This is a huge step for Visitation - a new revenue source for the school and resource for young families. Lots of our young families send their children to other preschools/daycares. Feels like a missed opportunity for Vis.*

*This will help attract young families to the school and once they are in the "feeder" system they are more likely to enroll in the school.*



## Question 12

### Other Needs

Participants were asked if there are any other needs or priorities that the parish should address prior to or in addition to the school improvements. While about two-thirds did not express any needs or priorities; about one-third (78 responses) shared a variety of requests and sentiments with the three most common, recurring themes including:

- A desire to see more families and children returning to mass (to pre-COVID levels).
- Concern about teacher compensation and retention and what can be done about it.
- Ensuring academics are relevant and top-notch.

## Question 13

Study participants were asked if they would consider a gift or pledge if a campaign were launched in the next 12 months. Of 227 respondents, about 73% indicated they would consider a gift or pledge; 7% were not inclined to contribute; 20% were unsure if they would share a financial gift.

### 227 Responses

Response Selection	Response Count	Response Frequency
Yes, I/We would make a gift or pledge.	164	73%
No, I/We would not make a gift or pledge.	17	7%
Not sure if I/We would make a gift or pledge.	46	20%

### Potential Support for a Visitation School expansion and renovation campaign

## Question 14

Survey participants were shown a chart of potential giving levels and asked to indicate a level, if any, that reflects the size of a capital gift they might consider pledging over a 1–3-year period. The gift would be over and above any annual support currently given to the Parish and is not in any way a commitment to Visitation Parish.

Of 193 participants who indicated they would be willing to financially support a Visitation School campaign, 168 shared an approximate level of gift they would consider. The amount of these potential gifts range from \$1.1M to \$2.2M.



**168 Responses**

Response Selection	Response Count	Response Frequency
\$5,000,000+	0	0%
\$2,500,000+	0	0%
\$1,000,000+	0	0%
\$500,000+	0	0%
\$250,000+	0	0%
\$100,000+	5	3%
\$50,000+	2	1%
\$25,000+	5	3%
\$10,000+	22	13%
\$5,000+	33	20%
\$1,000+	57	34%
\$1-999	44	26%
<b>\$1,171,400 to \$2,258,837 Giving Range</b>	<b>168</b>	<b>100%</b>

**Effect on Annual Giving**

**Question 15**

Annual Giving (tithing) sustains Visitation Parish and helps to offset the costs of its parish ministries and operations, including the Visitation School ministry. When only one type of gift is possible, the preference is for parishioners to make an annual over a capital gift.

In this question, participants were asked to describe what is most likely to happen to their annual giving should Visitation pursue a capital campaign for its school.

Overwhelmingly, nearly 85% of parishioners stated that they would maintain their current level of giving if they also made a capital contribution. About 6% stated that their giving annual giving would likely decrease if they committed to a capital gift.

## 212 responses

Response Selection	Response Count	Response Frequency
My annual giving will likely stay about the same as previous years if I also give a capital gift	179	84.4%
My annual giving would likely increase if I also gave a capital gift	8	3.8%
My annual giving would likely decrease if I also gave a capital gift	12	5.7%
My annual giving would likely stay about the same as previous years, but I would not likely share a capital gift	13	6.1%

## Question 16

Participants were asked to describe what is most likely to happen to their support of important school fundraisers such as the auction if Visitation pursues a capital campaign for its school.

## 213 responses

Response Selection	Response Count	Response Frequency
My support for school fundraisers will likely stay about the same as previous years if I also give a capital gift.	137	64.3%
Indifferent; I generally do not support or participate in school fundraisers.	47	22.1%
My support for school fundraisers would likely decrease if I also gave a capital gift.	19	8.9%
My support for school fundraisers would likely increase	10	4.7%

## Question 17

Study participants were asked who they believe would be a good leader(s) to help make a potential campaign a success. *See list in Attachment J.*

## 66 Responses

Response Selection	Response Selection
Terry (5) and Lindsey (6) Anderson	Stephen and Colleen Bowen
Matt (5) and Buffy (1) Gunter	Brett and Ann Coppage
Matt (1) and Sally (4) Sallee	Marty Fanning
Brendan (2) and Jean (5) McPherson	Katie Hall
Tighe (3) and Erin (3) Greenhalgh	Brooke Harris
Joe (3) and Ann (3) Hodes	Tera and Chris Hawley
John Stevenson (4)	Linda Hughes
Mark (3) and Amy (3) Thompson	Rob and Kristie Larson
Jeff (2) and Katie (1) Mohajir	Tom and Jean McDonnell



Response Selection	Response Selection
Billy Hodes (2)	Jason Moshier
Melissa Clarkson (2)	Mark and Micah Schloegel
Don Lueke (2)	Gary Smith
Annie and Ryan Anderson	Ray Sonnenburg
Kara and Bart Houlehan	Steve Torline
Andy Bond	

### Question 18

When asked if they would be willing to volunteer on a committee to help plan or implement a possible Visitation School campaign, about 12% of participants expressed interest in serving in some way. A full list of individuals and responses is in *Attachment J*.

#### 214 Responses

Response Selection	Response Count	Response Frequency
Yes, I would be willing to help on a possible campaign.	27	12.6%
No, I would not be willing to help on a possible campaign.	126	58.9%
Maybe. I might consider helping on a possible campaign.	61	28.5%

### Fundraising Environment and Timing

#### Question 19

The last capital campaign launched at Visitation was in 2006 and completed in 2010. The survey asked participants if this is a suitable time for the parish to initiate another campaign.

#### 224 Responses

Response Selection	Response Count	Response Frequency
Yes.	121	54%
No.	12	5.4%
Neutral.	82	36.6%
Opted to skip this question.	9	4%

#### Comments regarding campaign timing:

*Phase I needs to be done. Inflation and the stock market are not great, but most people would agree it's time. Better to spend money now than to wait for even bigger repair and maintenance bills.*

*If the proper leadership team is in place, then it is a good time to move forward.*

*We need to do it to attract and keep students for our enrollment.*





**Question 20**

Concerning the timing of a potential campaign, participants were asked how important it is for Visitation to conduct a campaign in the next 12 months for school expansion and renovation.

**222 Responses**

Response Selection	Response Count	Response Frequency
Very important.	86	38.7%
Somewhat important.	57	25.7%
Neutral.	51	23%
Not important.	12	5.4%
Not at all important.	5	2.3%
Opted to skip this question.	11	5%

Nearly 65% of participants indicated the launch of a campaign over the next 12 months was Somewhat or Very Important and qualitative comments offered various perspectives around the timing of the campaign.

Regarding a more immediate start to a campaign:

*There's no time like the present; Also, fundraising brings communities together and strengthens them.*

*The sooner the better. The costs of materials will only continue to rise.*

A significant number of participants offered reasons the parish may want to delay an immediate launch of a campaign:

- Developing action plans to address school concerns (enrollment, teacher/student retention, academics) and restore confidence among school families and general parish community.
- Wait to see if economic conditions improve - interest rates, jobs, labor/material costs, stock market – factors that may impact parishioners’ capacity to contribute at a higher level.
- Initiating a business plan/pro forma to ensure viability of an early childhood initiative.
- Gathering more input from the parish and school community on the most needed/desired capital improvements that align with Visitation’s capacity to fund it.

**Question 21**

**General Support**

Participants were asked, “Regardless of *your* support, how supportive do you believe the overall parish community would be of a potential capital campaign for Visitation School?”.



**223 Responses**

Response Selection	Response Count	Response Frequency
Very supportive.	76	34.1%
Somewhat supportive.	105	47.1%
Neutral.	28	12.6%
Not supportive.	3	1.3%
Not at all supportive.	2	.9%
Opted to skip this question.	9	4%

**Comments, suggestions, or questions parishioners would like Visitation to consider include:**

*Our contemporaries appreciate the education their children received at Visitation. Even if we don't have kids in school, it's the right thing to support; someone else planted the tree we're sitting under...we need to plant the next one for future generations.*

*Strengthening leadership at the school should be the priority. Once that is underway, more people would feel inclined to contribute to the school. I don't think the sentiment is there that will lead to a successful campaign.*

*Support for a campaign depends on who is leading it and how well they articulate the message and develop a process that is inclusive of as many parishioners as possible. That is what the 2006-10 process did. It was an inclusive process with over 20 committees involved.*

**Financial Support: Parish Stewardship and Fundraising**

Visitation’s feasibility study seeks to determine the parish’s support of a nearly \$17 million school campus project comprised of Phase I (\$7,450,000) and Phase II (\$9,478,000). The participants’ responses provide insight to their levels of financial support.

On occasion, a study may indicate that parishioners will not support a campaign without additional church visioning, planning, and communication efforts. In most cases, a realistic goal emerges and the parish can proceed with campaign planning.

Forecasting the fundraising amount relies on professional judgment and past experience – an art more than a science. Data gathered throughout the feasibility study process supports the practices that go into projecting an organization’s capacity to achieve its campaign goals. This includes:

- Information captured through the study process via 1:1 personal interviews, online surveys, and focus groups
- Annual giving trends
- Prior campaign outcomes
- Parish census data
- Drawing on professional expertise, experience, and best practices in stewardship and fundraising.



### Feasibility Study Fundraising Findings

Central to the Visitation Parish Feasibility Study is the strong commitment and appreciation its members have for the parish and school. An overwhelming majority of participants indicated that the parish meets their spiritual needs. Additionally, nearly 93% of participants state that they place a high value on Visitation Parish having a school ministry.

Furthermore, the following two study questions provide initial insights into potential fundraising results for a new campaign:

1. *If Visitation held a capital campaign for this project within the next 12 months, would you consider making a pledge?*

Response Selection	Response Count	Response Frequency
Yes, I/We would make a gift or pledge.	168	73%
No, I/We would not make a gift or pledge.	17	7%
Not sure if I/We would make a gift or pledge.	46	20%

While 73% of study participants indicated they would be inclined to financially support the campaign, key to reaching the Phase I goal is securing gifts of all levels, including major “lead” gifts to support a potential \$7.4M project.

For this reason, this second question provides additional insight for potential giving:

2. *Is there a level on this chart that reflects the size of a capital gift you might consider pledging over a 1-3 year period?*

Potential Gift Range Amount	Response Count
\$5,000,000+	0
\$2,500,000+	0
\$1,000,000+	0
\$500,000+	0
\$250,000+	0
\$100,000+	5
\$50,000+	2
\$25,000+	5
\$10,000+	22
\$5,000+	33
\$1,000+	57
\$1-999	44
<b>Total of 168 gifts being considered ranged from \$1,171,400 to \$2,258,837</b>	<b>168</b>



Of 193 participants who indicated a willingness to financially support a school campaign, 168 shared an approximate level of gift they would consider. While gifts of every level will be needed and appreciated, Visitation will need to cultivate several top-tier gifts and pledges to reach Phase I or Phase II goals.

**Trends: Registered Households**

Year	Number of Registered Households	Percentage Change
2018	1,572	
2019	1,482	-5.7%
2020	1,492	+ .7%
2021	1,413	-5.2%
2022	1,431	+1.2%
2023	1,423	-.5%

The chart above reflects an overall decline in the number of registered households at Visitation since 2018. There may be various factors for this, not the least of which was the global pandemic in 2019 and its after-effects. Additionally, the parish at this time did a major clean-up of its records to reflect current registered households. Despite the decrease in registered households, the number of households giving, as well as cumulative annual giving, has increased at Visitation as reflected in the following charts.

**Trends: Household Giving (Fiscal Year: July 1 to June 30)**

Year	Number of Giving Households	Percentage Change
2018	947	
2019	948	+ .1%
2020	945	-.3%
2021	931	-1.4%
2022	907	-2.5%
2023	986	+8.7%

Unquestionably, the 2019 pandemic had a significant impact on the giving households trend. This number has rebounded in 2023, however, with an additional 79 households contributing to Visitation over 2022 households.

**Trends: Annual Giving (Fiscal Year: July 1 to June 30)**

Year	Amount of Household Giving	Percentage Change
2018	\$4,013,540	
2019	\$3,896,991	-2.9%
2020	\$4,099,682	+5.2%
2021	\$4,085,310	-.35%
2022	\$4,195,405	+2.69%
2023	\$4,137,369	-1.4%

Annual Giving at Visitation has remained relatively level over the last five years, with contributions up 3% over 2018 giving.



## Historical Campaign Giving at Visitation

In addition to data collected through interviews and surveys, the financial feasibility for a capital project uses historical data to project future financial trends, enabling organizations to plan for the future.

### 1998 School and 2001 Visitation (*A Home for Generations*) Capital Campaigns

Visitation launched campaigns in 1998 to renovate the school and in 2001 to renovate the church. The projects totaled \$20.4M, of which the parish raised \$13.4M. A loan of \$8.2M was secured with the Diocese. From 2004-2008, the parish continued to pay down a portion of debt from these capital projects.

The following chart reflects the level of capital campaign giving and the number of gifts received from 2004-2008 to pay \$2.9M of the campaign debt.

2004-2008 Payments on Prior Capital Campaigns		
Gift Range	# of Gifts	Cumulative Amount
\$2,500,000+	0	\$
\$1,000,000 - \$2,49,999,999	0	\$
\$500,000 - \$999,999	0	\$
\$250,000 - \$499,999	2	\$604,746.99
\$100,000 - \$249,999	6	\$760,000.00
\$50,000 - \$99,999	3	\$183,704.35
\$25,000 - \$49,999	8	\$274,311.87
\$10,000 - \$24,999	25	\$331,044.49
\$5000 - \$9,999	41	\$256,118.32
\$1,000 - \$4,999	200	\$411,714.30
\$100 - \$999	189	\$85,145.98
<b>Total</b>	<b>474</b>	<b>\$2,906,786.30</b>

### Visitation Church's Debt Reduction (*Centennial*) Campaign 2006-2010

By 2006, debt grew to \$8.7M - an outcome of a large principal balance and high interest rates at the time. The parish launched a campaign at this time to eliminate debt. As reflected in the chart below, from 2006-2010 the campaign relied heavily on major gifts, with nearly 53% of contributions coming from 11 (1.5%) of the campaign's donors.



**Visitation Church’s Debt Reduction Campaign Giving by Gift Level**

<b>Campaign Giving 2006-2010</b>		
<b>Gift Range</b>	<b># of Gifts</b>	<b>Cumulative Amount</b>
\$2,500,000+	0	
\$1,000,000 - \$2,499,999	2	\$2,340,000.00
\$500,000 - \$999,999	1	\$880,254.77
\$250,000 - \$499,999	3	\$880,000.00
\$100,000 - \$249,999	5	\$541,291.21
\$100,000 - \$249,999	5	\$541,291.21
\$50,000 - \$99,999	16	\$885,112.54
\$25,000 - \$49,999	27	\$888,897.85
\$10,000 - \$24,999	77	\$1,094,004.86
\$5000 - \$9,999	90	\$563,279.03
\$1,000 - \$4,999	275	\$597,397.18
\$100 - \$999	232	\$89,530.60
<b>Total</b>	<b>728</b>	<b>\$8,759,768.04</b>

**Forecasting:**

**Capital Giving Percentages of 2022 Annual Giving for 60 Households**

The 2023 feasibility study was able to compare a segment (60) of the 168 Visitation households that shared a specific giving level to a future capital campaign with those same donor households’ 2022 annual giving. The following chart captures the giving percentages of possible capital campaign gifts against their 2022 annual giving.

It should be noted that a few of the 60 households suggested a range of possible giving, i.e. “We would pledge between \$5,000 and \$10,000.” The following chart includes the low and high percentages, as well as an average of the ranges.

<b>Possible Capital Campaign Giving as a Percentage of 2022 Annual Giving (60 households)</b>	
Low	Pledge/Gift would be 24% of 2022 Annual Giving Amount
High	Pledge/Gift would be 1111% of 2022 Annual Giving Amount
Average	Pledge/Gift would be 216% of Annual Giving Amount

Well run capital campaigns in church settings tend to raise roughly 100%-300% of total annual giving. Campaigns that focus on debt relief or deferred maintenance generally raise around 100% of annual giving.



Using the above formula, if campaign giving at Visitation averaged 216% of 2023 annual giving (\$4,137,369), the parish could realize campaign gifts of \$8,934,844. This level of fundraising would require all levels of support including top-tier (six- or seven-figure) gifts as in past campaigns.

**Aggregated Projected Giving Percentages**

The following chart captures potential capital campaign giving based on percentages of 2023 annual giving\*. As a reference point, the \$8.7M debt reduction campaign raised 250% of annual giving which, from 2006-2013, averaged about \$3.5M per year. *It must be noted that the parish achieved this with three (3) significant gifts that accounted for over \$3.2M of the debt relief.*

Well-managed capital campaigns for churches tend to raise roughly 100%-300% of total annual giving. Campaigns that focus on debt relief or deferred maintenance typically hover around 100% of annual giving.

Consecutive campaigns that follow one after another also tend to produce results on the lower end of the range. Campaigns that raise money for brand new buildings or investments seen as transformational can raise roughly 300% of annual giving.

\*Annual giving includes annual pledge payments from parishioners, offertory gifts from parishioners who did not make a pledge, offertory contributions from non-parishioners, loose cash/change in the offertory collection, holy day collections and miscellaneous contributions for designated or undesignated purposes.

Variables of 2023 Annual Giving (\$4,137,369)	
100%	\$4,137,369
150%	\$6,206,053
200%	\$8,274,738
250%	\$10,343,422
300%	\$12,412,107



## **Determining Feasibility and Campaign Readiness**

After assessment of the feasibility study responses, parish census data, current and historic giving trends, and prior campaign data, Rozanne Prather Consulting believes that the success of Visitation School capital campaign will rely heavily on the short- and long-term plans for the school's growth and sustainability, as well as its confidence in parish and school leadership to implement these future plans.

A successful campaign to fund the proposed Visitation School project (Phases I, II, or a combination) *is* feasible, but only with thoughtful consideration and pre-campaign planning relevant to the study outcomes. Future investment at all levels – from parishioners *with or without* a student in the school – will hinge on the parish's responsiveness to the study outcomes.

When the parish and school community believe that their thoughts and concerns are being addressed, it is likely that Visitation Parish could raise between \$6M and \$8M for Phase I. The \$2M difference in this range is contingent on the parish's ability to cultivate and garner major gifts. This is a foundational requirement for most campaigns to accumulate adequate funding for large capital projects.

Best practices for Visitation's campaign readiness are outlined below in addition to recommendations for drawing upon the study results to guide a successful campaign.

With well-developed pre-campaign planning, Visitation could potentially begin a campaign in late 2024 or early 2025.





## **5 Criteria for Feasibility**

The recommendations provided herein are based on five criteria for determining feasibility and campaign readiness. Visitation Parish and School's stakeholders must have:

1. a strong belief in the organization and advancement of its mission
2. confidence in the leadership
3. a belief that the project and campaign are realistic
4. a willingness to contribute financially
5. a sense of urgency to complete the project.

### **Indicators at Visitation Parish:**

#### **Deep appreciation for a vibrant, community-focused parish**

Visitation parishioners place a high value on the mission of the church, its commitment to social concerns and outreach, and the fellowship of a supportive community. Nearly 90% of parishioners stated that the parish meets its spiritual needs.

To that end, many also shared their desire for more parishioners to attend mass. These sentiments are based not only on returning to pre-COVID attendance levels, but also re-engaging school families who do not regularly attend mass with their children. Many expressed that this intergenerational presence is an important part of building a stronger, more united faith community. It was a common sentiment expressed by school families as well as parishioners without students in the school.

#### **Confidence in Parish and School Leadership**

This is one of the areas of greatest concern in the feasibility study process. Participant feedback regarding the parish pastor was documented for the study, though new leadership came on board on July 1, 2023, as part of the Diocese's cyclical re-assignment of priests.

Regarding confidence in school leadership, participants expressed concerns related to inadequate communication and responsiveness, staff turnover, loss of students/families to other schools. Many participants also shared that these and other concerns will need to be addressed and a plan formulated to grow and sustain enrollment before they will support a school campaign.

#### **Support for the school renovation and expansion project and Early Childhood Center plans**

Study participants are mostly in favor of the school's renovation and expansion plans, with 85% being somewhat or very supportive of the capital improvements. Parishioners acknowledge the need to ensure the school and academic offerings are up-to-date and relevant to today's academic environment and marketplace; attracting students, families, and educators to the parish and school; and building upon the school's significance as an anchor in the neighborhood.



Support for the project, however, comes with explicit requests for Visitation to address concerns with school leadership, student and teacher retention, and the viability of an Early Childhood Center.

In short, many stated that it would not be prudent to pursue new facilities until actionable plans are made to address the concerns. To that end, the Visitation PTO in September of 2023 retained an independent consultant to lead a Strategic Planning process to address the academic planning, growth, and sustainability of Visitation School.

The desire for additional information and due diligence on both the school project and Early Education Center does not erode the overall support for these projects. It does make clear that the parish should not begin fundraising until it can more clearly respond to the most significant issues presented in the study. This investment of time and planning will make for a more effective campaign.

### **Willingness to contribute financially**

Visitation will need to cultivate gifts of all sizes to fulfill the proposed campaign goal of \$7M-\$8M for the first phase. Most participants in the feasibility study indicated they would be willing to contribute financially to a capital campaign, with 73% (192 respondents) indicating they would give; 17% indicating they would not contribute; and about 20% being unsure if they would support a campaign. Nearly 90% of those willing to give indicated a range of their gift level – from under \$1,000 to \$100,000 - with these gifts totaling between \$1.1M and \$2.2M.

Based on the number of giving households at Visitation, the acquisition of major gifts above \$100,000 will be needed to achieve the campaign goals. Based on prior campaign history, cultivating gifts in this range is not unreasonable at Visitation Parish if the campaign leadership can present a compelling case for support, as well as cultivate donors with the financial capacity and who value this endeavor.

### **Sense of urgency to complete the project**

This element of campaign viability is somewhat concerning, as just under 65% of respondents indicated that it is Very or Somewhat important to begin a school campaign at Visitation in the next 12 months.

Several factors are likely tied to the hesitancy in moving forward. External factors point to high interest rates and lower portfolio values, as well as the high cost of construction goods/labor. Internal factors mostly center on school leadership, student and teacher retention, and requests for more due diligence on the scope and order of each campaign phase, as well as ROI on the Early Childhood Center.

Perhaps most important, Visitation wants to ensure that parish leaders are developing plans to address its overarching concerns prior to launching a campaign. The parish is certain to experience greater participation rates and more fundraising success if it first takes the time to develop the Strategic Plan for the school, to restore confidence, and to follow through with pre-campaign readiness recommendations.



## **Recommendations for Visitation Parish and School**

### **Recommendation 1:**

Communicate the results of the feasibility study and the next steps Visitation will take to prepare for a school capital campaign. The information should be presented in a variety of ways to ensure all parishioners have access and opportunity to learn of the study findings.

### **Recommendation 2:**

Begin planning for a successful campaign with best practices in campaign readiness prior to the launch. This includes plans for:

- clear and frequent communications that share the parish and school's vision for the future, promote transparency, and ensure that parishioners' concerns and ideas are considered;
- reengaging parishioners in mass attendance and strengthening communal life of Visitation Parish;
- continue with an inclusive Strategic Planning effort process for the school; release the plan, implementation timeline, and progress.
- deciding on the scope of Phase I of the school campaign, obtain current cost estimates, and renderings for use in campaign communications and materials; and
- investing time and effort in strengthening general stewardship and tithing.

### **Recommendation 3:**

Visitation should assemble a well-qualified committee to produce a pro forma of the proposed Early Childhood Center (ECC); share the results with the leadership and the parish of the anticipated ROI, staffing needs, options for timing (Phase I or Phase II), potential outsourcing, and ECC location. This is an imperative step if/when the ECC is rolled into either Phase I or II of the school campaign.

### **Recommendation 4:**

Develop plans for staffing and managing a capital campaign. This is an endeavor that far exceeds the day-to-day duties and responsibilities of internal staff. Campaigns require expertise in fundraising and specific skills including volunteer recruitment and organization, data analysis, donor prospecting, cultivation/solicitation/stewardship, gift acceptance policy and procedure, and marketing and communications.

Because Visitation Parish likely does not have the capacity to manage a campaign of this scope with its current staff, Rozanne Prather Consulting advises that Visitation expand its capacity in one of two ways: by hiring a campaign consultant to work in collaboration with current staff; or to increase the current level of staffing with one person assuming primary responsibility for the capital campaign.



To pursue a campaign without experienced and dedicated support would likely jeopardize the success of the campaign due to delays, unfamiliarity with best practices and process, and poor fundraising results.

**Recommendation 5:** Begin active planning to launch a campaign that includes a Pre-Planning Phase, Organizational Phase, Cultivation and Education Phase, Commitment Phase, and Follow-Up Phase. Descriptions and Timelines for these phases are outlined in the Feasibility Report, *Attachment Q*.

**Recommendation 6:**

The most successful campaigns engage volunteers in key roles. As your most influential ambassadors for Visitation Parish and School, these leaders spark enthusiasm and interest in the campaign. They work in collaboration with staff and campaign counsel on the multi-faceted efforts of cultivating, soliciting, and stewarding contributors to the project.

Rozanne Prather Consulting recommends that Visitation first secure leaders to head the campaign including the roles of Honorary Chairs, and Campaign Co-Chairs, followed by recruiting a variety of other key positions outlined in the Campaign Organizational Chart (*Attachment N*). The broader and more diverse this engagement is, the more opportunity for a successful campaign.

To support this portion of the pre-campaign process, several documents are provided to help develop a strong campaign structure:

The following attachments will help in identifying, recruiting, and planning for campaign volunteers:

- Interview Participants - *Attachment B*
- Focus Group Participants - *Attachment D*
- Recommendations for Campaign Leaders and Committee Volunteers - *Attachment J*
- Campaign Organizational Chart - *Attachment N*

**Recommendation 7:** Develop a “leadership giving” segment of the campaign to drive major gifts. Cultivating these gifts (\$100K+) often involves more personalized connections to prospective donors, greater engagement with the pastor, using a peer-to-peer approach, and providing opportunities for alternative giving such as stocks and other appreciated assets.

In Visitation’s last debt reduction campaign (2006-2013), 130 donors (17% of all the donors) contributed nearly 86% of the \$8.7M raised. Similarly, the proposed campaign will also rely on a segment of donors to generate the majority of contributions. For this reason, the leadership giving strategy to solicit major gift prospects is essential to kickstarting the campaign prior to soliciting the broader parish and school community.



**Recommendation 8:** Ensure that prayer and stewardship are at the heart of the campaign. No matter the financial capacity of parishioners, prayer and stewardship offer everyone a chance to be involved in the success of the campaign. Compose a campaign prayer for home and at church, and integrate stewardship messaging in all campaign communications.

**Recommendation 9:** Develop a campaign communications plan to ensure parishioners have multiple access points to information about the campaign, the project, finances, logistics, and ways to be involved. Consistency and frequency are important as is “meeting people where they are” to allow parishioners of all walks the opportunity to feel pride and ownership in the new project.

**Recommendation 10:** As construction nears, identify an experienced project manager to oversee communications with school families (and parish, if needed) to ensure there is frequent and responsive communication related to the building project and any impacts on students and families. This individual would collaborate with the construction superintendent to ensure the flow of essential and timely information.

**Recommendation 11:** Offer the opportunity for contributors to pledge their support over a three-year period. This allows Visitation to secure larger gifts beyond its annual contributions while not risking attrition of pledges that extend too far into the future.

**Recommendation 12:** After careful assessment of the *Feasibility Study Findings* and *Financial Support: Parish Stewardship and Fundraising* sections of this report, set a campaign goal that considers historic giving, projected giving of lead donors, and the scope/updated cost of the project.

**Recommendation 13:** A well-run capital campaign can generate excitement and renew commitment to the parish. Given the generational legacy of Visitation families, the campaign could also provide an opportunity for endowed gifts for the parish campus or for identifying prospects for planned gifts or bequests to Visitation Parish or School.