



August 13, 2013

We wish to extend our thanks to all for the cooperation, support and gracious hospitality extended to Leslie Pendleton throughout the feasibility study process recently completed.

A special word of thanks goes out to Francis Bushhammer for coordinating the writing of the case statement, distribution of the surveys and overall shepherding of the feasibility study process; Rebecca Strehlow and Kat Banakis for coordinating mailing lists and emails; and all members of the Capital Needs Committee, Jeannette DeFriest, Linda Winter, Mary Pat McKeown, Timothy O'Brien, Debora de Hoyos, Gregory Jorjorian, Scott Romans, and Jane Young.

During the implementation process, we found friendly, concerned, and open communication regarding the proposed campaign and project plans. A total of 90 units participated in the survey; 7 interviews were conducted, 10 responded to the mail questionnaires, and 73 responded to the online survey. This represents a total response rate of 45% among the members of the church community that were contacted.

This study is our distillation of the information, opinions, and ideas gathered through the survey. It represents our combined evaluation and appraisal of major factors related to the proposed campaign.

Now important decisions must be made to continue the momentum essential to the success of a campaign. The Episcopal Church Foundation welcomes the opportunity to provide further assistance.

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I. Tentative Case Statement	

Executive Summary

After an extensive period of discernment, and careful evaluation of needs, parishioners of St. Luke's, Evanston, IL were surveyed through a Feasibility Study conducted by the Episcopal Church Foundation (ECF) in June 2013. The purpose of the study was to determine the willingness of the parish to support a proposed capital campaign to raise up to \$2,857,354 from members of the congregation for building repairs, renovations, and improvements.

All members of the parish were invited to participate in the feasibility study and 45% responded to the survey via personal interviews, led by the ECF consultant, direct mail, and electronic emailed survey.

Responses indicate 94% support among the respondents for conducting a capital campaign, although some have reservations. ECF recommends that St. Luke's move forward with a capital campaign with an adjusted goal.

Study results indicated that 86% of respondents would contribute to a campaign at this time. By using the ranges of estimated gifts they indicated, and applying a formula which takes into account as yet unidentified gifts, as well as other relevant factors noted in the responses, ECF recommends that St. Luke's conduct a capital campaign to raise a primary goal of \$1,871,000.

Based upon the comments expressed in the Study, and overall general agreement that the identified projects are important and needed, an additional challenge goal may be considered, or an extension of years to pay off pledges.

All of the comments provided by respondents are included in their entirety in the following report. The unattributed comments should be read thoroughly in order to obtain a complete understanding of all views expressed in the Study. This will prove very helpful to the leadership and members of the congregation as decisions are made about moving the campaign forward.

Section One of this report provides background on ECF's Feasibility Study methodology and offers more detailed conclusions and recommendations flowing from the results of the Study.

Section One:

Conclusions, Recommendations and Methodology

I. Introduction

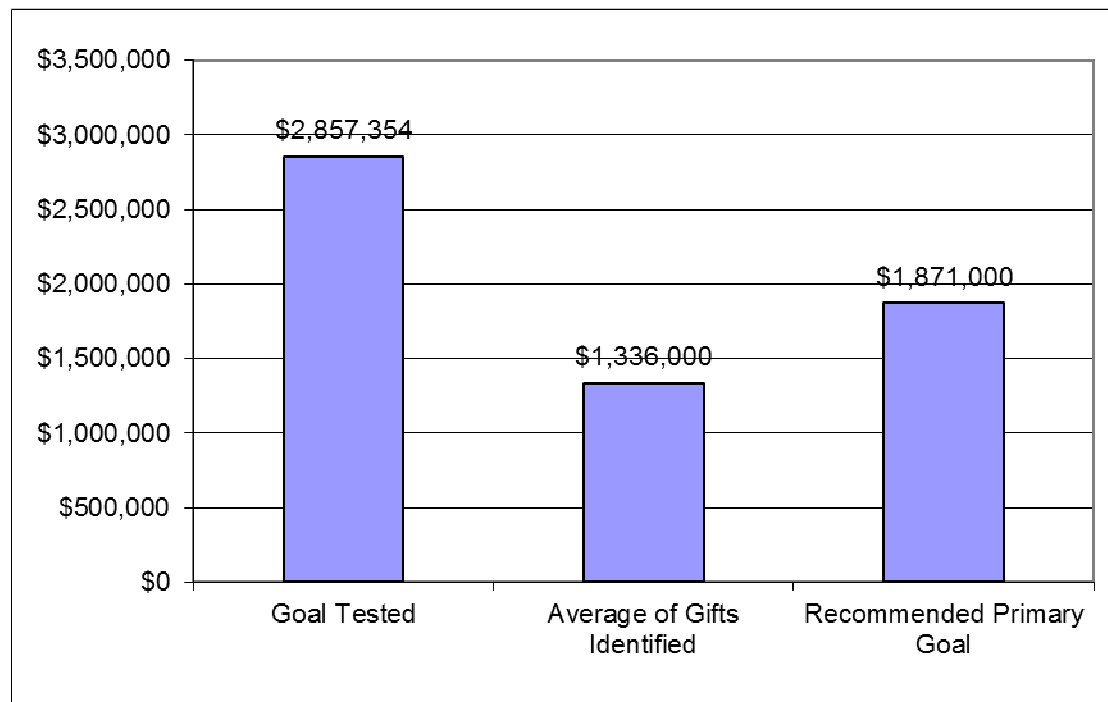
For some time the leadership of St. Luke's Episcopal Church, Evanston, Illinois has been evaluating the parish's programs, facilities, and resources, and assessing the capital needs of the church. After much study and the involvement of many people, the Vestry authorized the Episcopal Church Foundation to conduct a feasibility study to explore the willingness of the congregation to support financially these identified needs.

The facts, findings, and recommendations of the resulting survey, now completed, provide a sound basis for leadership decisions with regard to the future of a fund drive. A complete description of the goals of the proposed plans may be found in the tentative case statement in the Appendix.

II. Conclusions

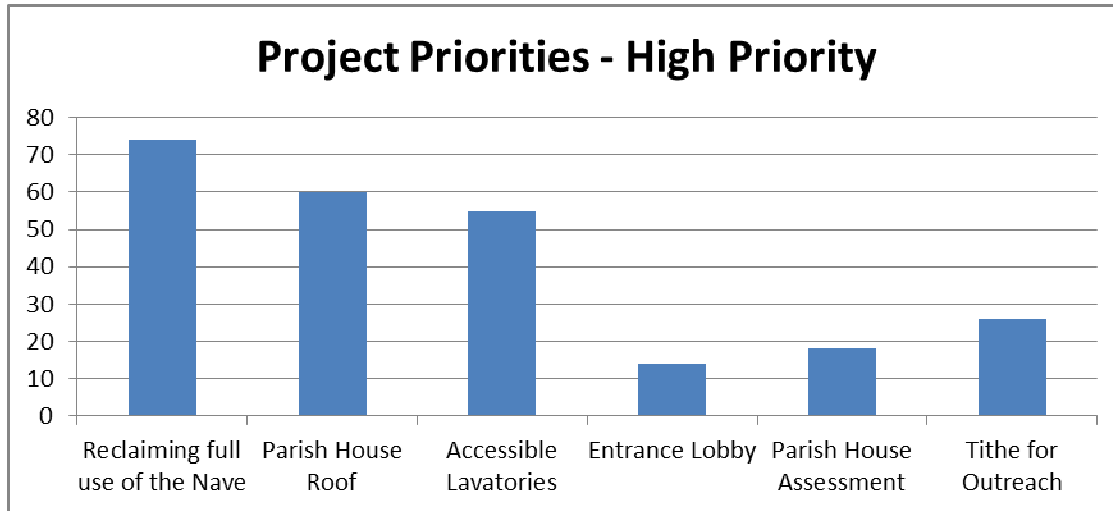
Gift Potential

Experience tells us we can take the average between the low estimate (\$923,000) and the high estimate (\$1,749,000) of the pre-campaign projections revealed in the Study and multiply by a factor of 1.4 when certain percentages and comments (such as revealed in this study) are attained. Thus the average, \$1,336,000, when multiplied by this factor (1.4) reveals a suggested goal of \$1,871,000. This recommendation is made factoring in the reality that additional gifts, not yet identified, will be forthcoming; hence the multiple of 1.4.



Awareness of Need

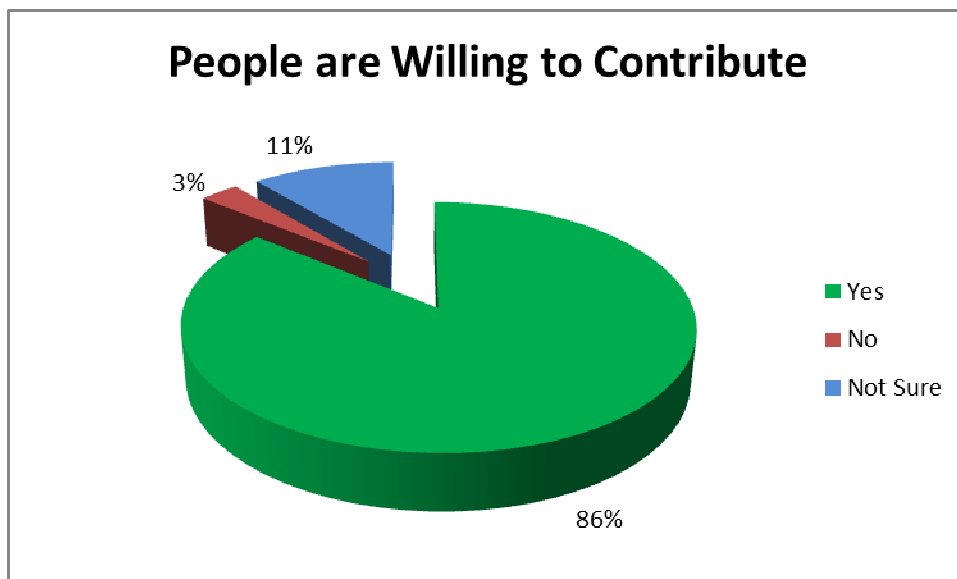
A majority of respondents (97%) were aware that St. Luke's Episcopal Church is considering a possible campaign, and 97% were also aware of some or all of the proposed plans. Of course, not all the items received the same degree of support. Present awareness of need is a positive; however, each project should be studied and prioritized with consideration given to the degree of support and the resources available.



Interest in and Support for a Capital Drive

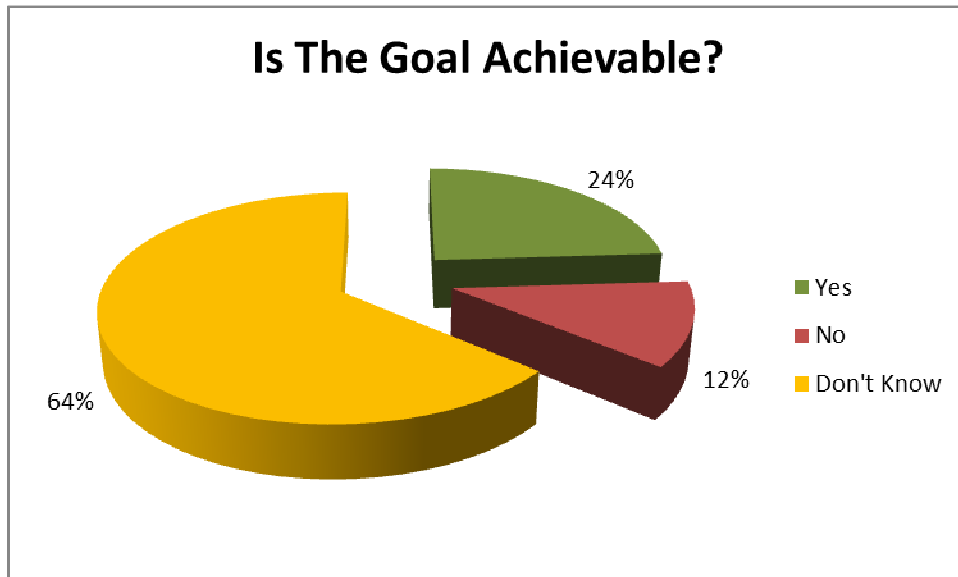
There is significant indication of support for the proposed campaign, but also signs that suggest caution. Positive signs from respondents include:

1. Ninety-four percent are in favor of the campaign, although some with reservations.
2. Only 5% are opposed to the proposed campaign timing.
3. Eighty-six percent of respondents would give to the campaign.
4. Twenty-six percent are willing at this early stage to consider a volunteer position.

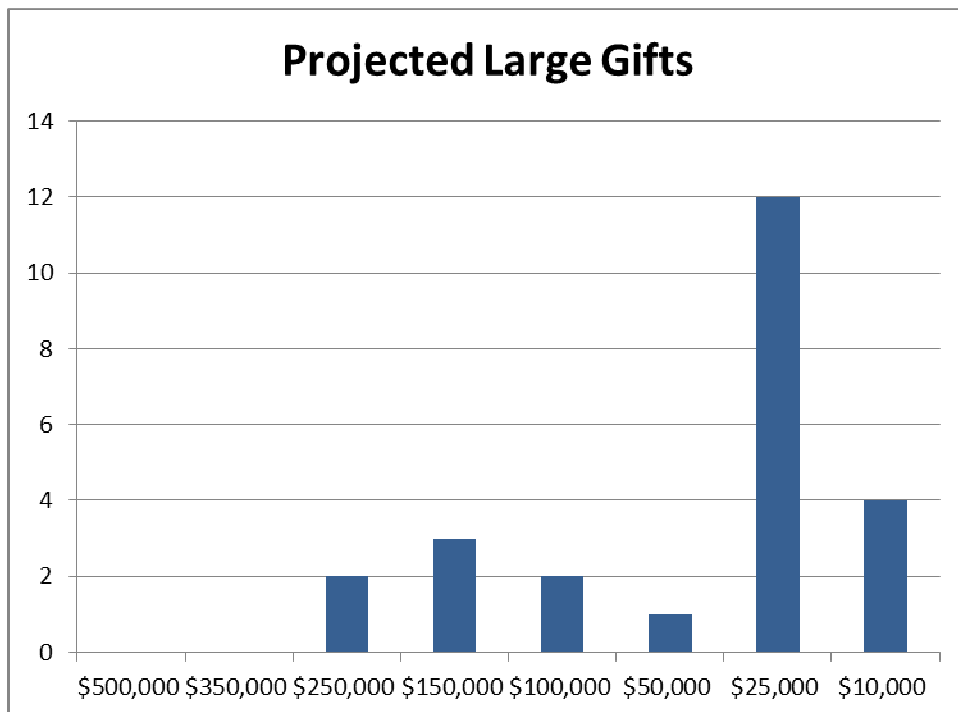


Concerns

1. Approximately 24% of respondents feel the goal is reachable. Twelve percent feel it is too high. The remaining 64% had no opinion on whether this goal can be achieved. This is an indication that the proposed goal is too high.



2. No lead gift was identified, and too few other gifts were reported at this early date to allow a goal of \$2,857,354 to be fully embraced.



Influential Leadership

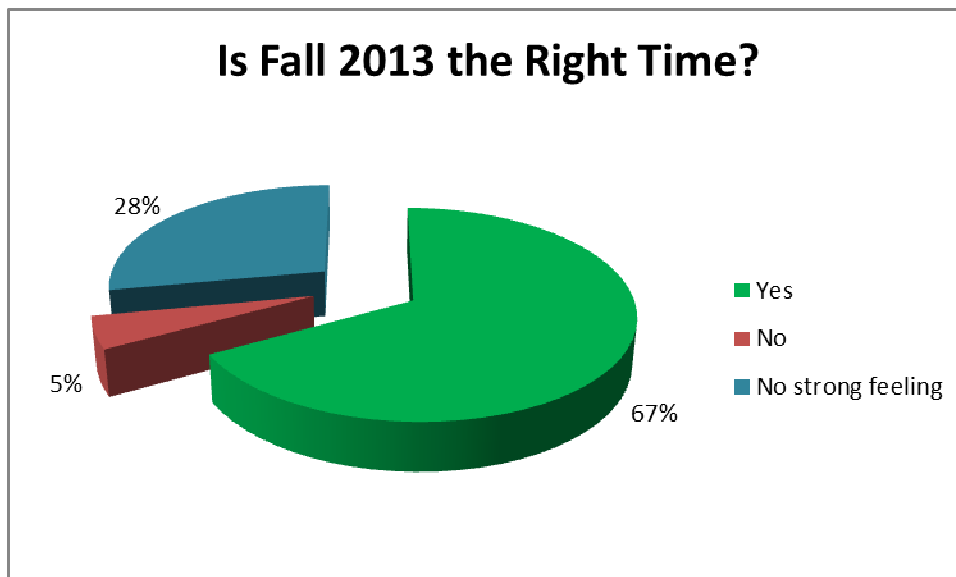
Strong leadership—both financial and volunteer—is absolutely essential for the success of any campaign. A leadership core is presently in place. It is the challenge of this leadership group to expand involvement within the parish, including other individuals who may have significant giving potential. With involvement comes commitment.

Planned Giving

A number of people requested planned giving information, and 11 indicated the church was already in their estate plans. This is encouraging and suggests that such future gifts could be used to help build endowment or retire indebtedness.

Campaign Timing

The respondents endorsed the proposed campaign timing. Of course, decisions on the priorities of projects must be made. It is imperative to revisit the proposed plans and make appropriate changes in the size of the effort, the proposed goal, and other sources of funding.



III. Recommendations

Recommendation #1

The information revealed in this Study suggests that a capital campaign for a Primary Goal of \$1,871,000 is realistic and appropriate. This presupposes that an assertive campaign involving the entire constituency would be launched, and that the type of methodology used by the Episcopal Church Foundation would be followed.

Recognizing that immediate needs are greater than what is revealed in the Study, leadership may wish to consider \$1,871,000 as the “primary” goal and establish a larger “challenge” goal, which would encourage the congregation to stretch to longer pledges—five years rather than three years, for example.

If the “challenge” was not reached, the congregation would still experience success by achieving the “primary” objective, but hopes would be high that the challenge, at least in part, could be accomplished.

Recommendation #2

Planned giving activities should be pursued during the campaign in an effort to encourage major gifts to underwrite the future of the church. Such gifts, often deferred and received in future years, are helpful in reducing mortgages or indebtedness. The Episcopal Church Foundation is responding to individual requests for information on planned giving.

Recommendation #3

Review the Tentative Case Statement and make final decisions based on the financial feasibility revealed in the Study. Consider also the prioritization suggested by respondents.

Recommendation #4

Share as soon as possible the revised plans with the congregation and seek increased consensus. Increase significantly all publicity concerning this project.

Recommendation #5

Once the leadership has had an opportunity to review the Study recommendations and revise the proposed plan, a timetable such as the following should be considered to maximize success:

Months 1-2	Determine campaign calendar and budget. Announce goal. Begin materials development (pledge cards, brochures, letterhead, etc.). Recruit and train campaign leadership and support committee chairs. Evaluate Advance Gift prospects.
Months 2-3	Continue to train leadership. Complete materials development. Begin Advance Gift solicitation. Contact planned giving prospects, if appropriate.

- Months 3-4 Prepare for and launch the Congregational Gift division. Hold kick-off event. Begin personal solicitations and monitor solicitation efforts.
- Months 4-5 Finalize all calls. Set up pledge collection and acknowledgment systems. Hold Celebration Event to acknowledge conclusion of the campaign and recognize the leadership and volunteers.

Recommendation #6

Select professional management to guide and direct the campaign to insure efficiency and the implementation of a proven, successful fundraising methodology.

IV. Methodology

A. The Feasibility Study

As the parish considers a capital campaign, it should reflect on several important questions:

- ◆ What conditions are essential to a successful campaign in the church community?
- ◆ How much money realistically can be raised?
- ◆ Will the church community support a drive that fulfills the goals of the proposed plans?
- ◆ When should the campaign begin, and how long should it last?
- ◆ What volunteer leadership is available to head the campaign?

Determining the answers to these and other questions was the major purpose of the Feasibility Study. Through the Study we have researched, analyzed, and evaluated fundamental factors present, or capable of development, which might influence a capital campaign.

The study was conducted in three phases: research, personal interviews, and direct mail.

Phase I

An examination of the proposed needs, development of a “Tentative Case Statement,” determination of optimum campaign goals and timing, and review/selection of personal interview prospects were completed during sessions with the parish leadership.

Phase II

A sampling of parish members was selected for personal interviews. A total of seven interviews were ultimately conducted by Leslie Pendleton and Teresa Mathes of the Episcopal Church Foundation. A listing of the persons interviewed may be found in Section Three: Personal Interviews.

Phase III

A mail survey was sent to 35 households. Included in the mailing was a letter requesting participation in the survey, the questionnaire, the tentative case statement and a self-addressed return envelope.

An online survey was sent to 156 households. Included in the mailing was a letter requesting participation in the survey, the online questionnaire, and the tentative case statement.

STATISTICAL NOTE:

- ◆ A total of 35 direct mail questionnaires were mailed to the parish community.
- ◆ Of those, 10 were returned: a mail response rate of 29%.
- ◆ A total of 135 online surveys were sent to the parish community.
- ◆ Of those, 73 were returned: an online response rate of 54%.
- ◆ Including the 7 who were interviewed, 198 units were exposed to the study. Of those, a total of 90 units or 45% participated.
- ◆ Based on experience, this response rate is a good representative involvement from the parish community, lending credibility to the study findings.
- ◆ Of the total that participated, the majority, 60%, attend worship services one or more time(s) per week.
- ◆ Regarding the financial-giving practices of those who responded, the majority, 77%, are regular contributors with a written annual pledge.
- ◆ In importance of charitable donations, St. Luke's ranks as in the top five charities that respondents donate to, with 51% rating it as such.

B. Elements of a Successful Campaign

There are certain elements which must exist in connection with every successful fundraising campaign.

1. Recognition and acceptance of the “tentative needs” as expressed.
2. The case for widespread appeal.
3. Availability of strong financial leadership.
4. The capability of existing leadership to recruit additional support.
5. Past and current support levels for other church-wide capital campaigns.
6. The congregation’s awareness of the proposed plans.
7. The economic optimism of the parish community.
8. Possible conflict with other past, present, and projected community, parish or diocesan campaigns.
9. Overall response to goal attainability.
10. Indicated interest in contributing to, and projected levels of support for the proposed campaign.
11. Projected timing of the campaign.

These elements are carefully reviewed in this report. The Conclusions and Recommendations Section of this report addresses the elements of success as we consider the readiness of St. Luke’s Episcopal Church to proceed with a major capital campaign.

NOTE: Minor editing has occurred in the comments to ensure grammatical accuracy and preserve the anonymity of the feasibility study respondents. Also, the spellings of some names could not be verified against the parish directory.

Section Two:

**Composite Analysis and Summary of
Personal and
Direct Mail / Online Responses**

Results from 7 Personal Interviews and 10 Direct Mail and 73 Online Responses **Total of 90 Responses**

Note: Not all respondents answered all questions.

Awareness of Need

- 1. Prior to this survey, were you aware that the parish was considering a capital campaign?**

83 Yes _3_ No

Ninety-seven percent were aware that St. Luke's Episcopal Church is considering a capital campaign. This is a positive indication that the church leadership has prepared the ground for a major capital campaign.

- 2. Prior to this survey, were you aware of the needs as expressed in the accompanying proposed plans?**

60 Aware _3_ Not Aware _24_ Aware of some of the needs

Sixty-nine percent of the respondents were aware of the capital needs of St. Luke's Episcopal Church. Another 28% were aware of some of the needs. Only 3% were not aware of the needs. This is an indication that the leadership has done a fine job of communication.

- 3. Are there additional needs that seem important to you which are not covered by the proposed plans?**

A number of additional needs were offered and should be read.

Interest in and Support for a Capital Drive

- 4. Generally speaking, do you favor the parish conducting a capital campaign as outlined in the proposed plans?**

60 Yes _5_ No _18_ Yes, but with some concerns

Seventy-two percent are in favor of the campaign, with another 22% in favor with some concerns. Only 6% are opposed to the campaign. This is a sign that the church community is willing to support a campaign.

5. Please indicate the level of priority you would attach to each of the projects outlined in the proposed plans by checking the appropriate line under each heading. At present, they are listed in no particular order.

**Select only one option per line and feel free to make comments (use an extra sheet if necessary).*

	PRIORITY				
	High	Medium	Low	Opposed	Lack Information
<i>Phase III:</i>					
a. Reclaiming full use of the Nave	<u>74</u>	<u>8</u>	<u>0</u>	<u>2</u>	<u>0</u>
b. Parish House Roof	<u>60</u>	<u>16</u>	<u>4</u>	<u>2</u>	<u>1</u>
c. Accessible Lavatories	<u>55</u>	<u>19</u>	<u>8</u>	<u>1</u>	<u>2</u>
d. Entrance Lobby	<u>14</u>	<u>34</u>	<u>25</u>	<u>6</u>	<u>5</u>
e. Parish House Assessment	<u>18</u>	<u>40</u>	<u>17</u>	<u>3</u>	<u>5</u>
f. Tithe for Outreach	<u>26</u>	<u>16</u>	<u>24</u>	<u>12</u>	<u>6</u>

In determining which parts of the proposed case are most attractive to respondents, the following system is used:

High Priority = 3 points; Medium Priority = 2 points; Low Priority = 1 point;
Opposed to Project = -1 point; Lack Information = 0 points

The most popular receives the highest number of points.

a. Reclaiming full use of the Nave

222 High Priority 16 Medium Priority 0 Low Priority
0 Lack Information -2 Opposed to Project

Total Points: **236**

b. Parish House Roof

180 High Priority 32 Medium Priority 4 Low Priority

0 Lack Information -2 Opposed to Project

Total Points: **214**

c. Accessible Lavatories

165 High Priority 38 Medium Priority 8 Low Priority

0 Lack Information -1 Opposed to Project

Total Points: **210**

d. Entrance Lobby

42 High Priority 68 Medium Priority 25 Low Priority

0 Lack Information -6 Opposed to Project

Total Points: **129**

e. Parish House Assessment

54 High Priority 80 Medium Priority 17 Low Priority

0 Lack Information -3 Opposed to Project

Total Points: **148**

f. Tithe for Outreach

78 High Priority 32 Medium Priority 24 Low Priority

0 Lack Information -12 Opposed to Project

Total Points: **122**

RANKING BY POINTS:

Reclaiming full use of the Nave	236
Parish House Roof	214
Accessible Lavatories	210
Parish House Assessment	148
Entrance Lobby	129
Tithe for Outreach	122

These rankings do not dictate those projects the church should embrace in the final case statement, but they are a strong indication of what communication and marketing must occur if leadership does elect to support projects that have a lower acceptance rating.

6. If the proposed total goal of \$2,857,354 cannot be fully funded by a capital campaign, how would you feel if the parish were to assume prudent long-term debt to ensure completion of these proposed plans?

23 Acceptable 50 Undesirable, but acceptable 11 Unacceptable

More than half (60%) responded that it is undesirable, but acceptable to assume long-term debt; another 27% said it is acceptable. Another 13% responded that long-term debt is unacceptable.

7. In your opinion, what major positive factors does the parish have in its favor for the proposed campaign?

Comments were many and varied. Some highlights include:

- Commitment
- Obvious needs
- Active and growing membership

8. What problems, if any, do you foresee for this project?

Comments were many and varied. Some highlights include:

- Raising the money
- Financial capacity of the parish
- Cost overruns/unforeseen expenses

9. What added ideas or suggestions do you have which might be helpful to the leadership in making this important decision?

Comments were varied and thoughtful and should be read in their entirety.

Leadership

10. If asked, would you be willing to work on a committee in support of the proposed capital campaign?

21 Yes 26 No 35 Not sure at this time

Twenty-six percent would be willing at this early date to volunteer. Another 43% are not sure at this time and may be persuaded to participate as the campaign plans are formulated. This is a relatively good response at this stage in the process. It appears likely that an adequate number of workers would be attracted to the campaign.

11. Among individuals you know, who would make an ideal CHAIR for this proposed capital campaign?

[The names of 29 individuals were suggested.]

12. Hypothetically, if you were a chair, who would you select to serve with you?

[The names of 52 individuals were suggested.]

Campaign Timing

13. Do you know of other current or projected capital campaigns in the community that might have an impact on the success of this proposed effort?

A few area campaigns were mentioned, but these should not affect the success of St. Luke's campaign.

14. Does a proposed solicitation period for pledges in the fall of 2013 seem appropriate to you?

55 Yes 4 No 23 No strong feeling

More than half of the respondents, 67%, are in favor of the proposed timing. Twenty-eight percent expressed no strong feeling one way or another. The remaining 5% were opposed to the campaign timing. This is an endorsement that a campaign could proceed as scheduled.

Gift Potential**15. How would you describe the present economic climate in your community?**

 1 Excellent 43 Good 34 Fair 3 Poor

Fifty-three percent of the respondents to this question believe the present local economy is good, 42% consider it fair. Four percent believe it to be poor, and one respondents rated it as excellent.

16. Is the present economic climate improving, remaining the same, or declining?

 46 Improving 29 Remaining the Same 6 Declining

Indications are that the local economy is improving, with 57% rating it as such. Another 36% believe it is remaining the same, and only 7% believe it is declining. These responses express economic optimism. When people feel the economy is good, they are more apt to make gifts.

17. To attain the proposed goal, substantial leadership gifts would be required. Are there individuals, foundations, or other sources who might support these proposed plans? (Please include mailing address, phone number, and email address if possible and please use the back of this page for additional space.)

A complete listing of names can be found in the Personal Interview and Direct Mail/Online sections of the report.

18. Do you think a goal of \$2,857,354 (as outlined in the proposed plans) can be raised in gifts and pledges?

 20 Yes 10 No 52 Don't Know

Twenty-four percent believe the goal can be attained, while another 64% have no opinion if it can be reached. Another 12% do not believe the goal can be attained. Normally, we like to see at least a majority believing the goal is feasible. Generally when less than half are confident about the projected goal, the proposed goal is usually too ambitious.

**19. If convinced of the need, would you be willing to contribute to this proposed campaign?
(All gifts, regardless of size, are needed and are important to the success of the
proposed campaign.)**

70 Yes 2 No 9 Not sure at this time

Eighty-six percent would be willing at this early date to contribute to the campaign, while another 11% expressed that they are not sure at this time. Only 3% indicated a negative response. This is a positive and an indication that a campaign can proceed.

20. If "yes," please estimate your possible total range of giving. Gifts potentially could be paid over a several-year period. *This is not a pledge or in any way binding.*

<u>10</u> \$500 or less	<u>14</u> \$500 to \$1,000
<u>10</u> \$1,000 to \$3,000	<u>12</u> \$3,000 to \$5,000
<u>4</u> \$5,000 to \$10,000	<u>12</u> \$10,000 to \$25,000
<u>1</u> \$25,000 to \$50,000	<u>2</u> \$50,000 to \$100,000
<u>3</u> \$100,000 to \$150,000	<u>2</u> \$150,000 to \$250,000
<u>0</u> \$250,000 to \$350,000	<u>0</u> \$350,000 to \$500,000

**Typical Gifts Essential to the Success
of a \$2,857,354 Capital Campaign**

Size of Gift	# Needed	Gifts Indicated in Study*
\$500,000	1	0
\$350,000	1	0
\$250,000	2	2
\$150,000	3	3
\$100,000	4	2
\$50,000	5	1
\$25,000	7	12
\$10,000	8	4
\$5,000	10	12
\$3,000	12	10
\$1,000	14	14
\$500 and below	Many	10

*Using the high range estimate

Respondents projected donations ranging from a low of approximately \$923,000 to a high of \$1,749,000. While not indicated in the chart above, not all gift amounts were given within a range as presented. Some were given as singular amounts, e.g., \$5,000, instead of \$3,000 to \$5,000. The high and low estimates have been adjusted accordingly. These early estimates fall short of supporting \$2,857,354 as a primary goal.

Planned Giving

21. In addition to making a gift to the proposed campaign, some parishioners may wish to explore planned or legacy gifts. Check the blank next to the item(s) of interest. Materials will be sent to you from the Episcopal Church Foundation.

- 3 Make a gift to your parish through a bequest in your will.
- 3 Create a charitable gift annuity (minimum gift of \$5,000).
Benefits of a charitable gift annuity could include:
- receive guaranteed income for life (i.e. current rates of approximately 4.7% annually at age 65, approximately 5.8% annually at age 75)
 - receive an income tax deduction now for the gift portion
 - receive some tax-free income from the investment until your life expectancy age
 - possibly reduce applicable estate and inheritance taxes
 - enjoy the satisfaction that at the death of the final income beneficiary, the remaining principal would go to an Episcopal congregation or entity you designate
- 2 Create a Charitable Remainder Trust with appreciated assets (minimum gift of \$100,000)
- 1 Create a Pooled Income Fund gift for life (minimum gift of \$2,500)
- 1 Donate appreciated real property such as a house, vacation home, farm or business
- 6 Send me the *Overview of Planned Giving* brochure which explains planned gift options further
- 2 Add me to the Episcopal Church Foundation e-newsletter on estate planning.

21a. 11 St. Luke's Episcopal Church is already in my will or estate plans.

Eleven individuals have already included the church in their estate plans. Several others have indicated they would welcome information. They will receive information confidentially from the Episcopal Church Foundation.

Section Three:

Personal Interviews

Listing of Persons Interviewed

[Seven interviews were conducted, involving 10 individuals.]

Results from 7 Personal Interviews

Note: Not all respondents answered all questions.

Awareness of Need

- 1. Prior to this survey, were you aware that the parish was considering a capital campaign?**

 7 Yes 0 No

- 2. Prior to this survey, were you aware of the needs as expressed in the accompanying proposed plans?**

 7 Aware 0 Not Aware 0 Aware of some of the needs

- 3. Are there additional needs that seem important to you which are not covered by the proposed plans?**

Comments:

I want chairs, not pews, so space can be more flexible.

We need to address the parish house in order to grow and accommodate a crowd, in order to sustain the nave.

We need to look at financing the community connector and choir master.

Interest in and Support for a Capital Drive

- 4. Generally speaking, do you favor the parish conducting a capital campaign as outlined in the proposed plans?**

 6 Yes 1 No 0 Yes, but with some concerns

Comments:

Let's make sure this will open St. Luke's up to the world, not just repair and return things to the status quo.

Let's get on with it!

I don't think the parish can sustain a building of this magnitude.

5. Please indicate the level of priority you would attach to each of the projects outlined in the proposed plans by checking the appropriate line under each heading. At present, they are listed in no particular order.

**Select only one option per line and feel free to make comments (use an extra sheet if necessary).*

	PRIORITY				
	High	Medium	Low	Opposed	Lack Information
<i>Phase III:</i>					
a. Reclaiming full use of the Nave	<u>7</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
b. Parish House Roof	<u>3</u>	<u>2</u>	<u>2</u>	<u>0</u>	<u>0</u>
c. Accessible Lavatories	<u>7</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
d. Entrance Lobby	<u>1</u>	<u>1</u>	<u>4</u>	<u>0</u>	<u>1</u>
e. Parish House Assessment	<u>1</u>	<u>6</u>	<u>0</u>	<u>0</u>	<u>0</u>
f. Tithe for Outreach	<u>2</u>	<u>1</u>	<u>2</u>	<u>1</u>	<u>1</u>

Comments:

I think it's time we concentrate on keeping the building standing in order to continue outreach. Let's not apologize for maintaining the property.

Could we downsize the nave to make use of it? Priority is making the nave safe.

Given the magnitude of the campaign, I think we need to focus on our building needs for once. I lack conviction about tithing for outreach.

6. If the proposed total goal of \$2,857,354 cannot be fully funded by a capital campaign, how would you feel if the parish were to assume prudent long-term debt to ensure completion of these proposed plans?

3 Acceptable 3 Undesirable, but acceptable 1 Unacceptable

Comments:

I would trust the vestry's leadership about what's prudent.

Only for \$200,000 or less.

7. In your opinion, what major positive factors does the parish have in its favor for the proposed campaign?

Comments:

I'm so excited about where we are right now. Our newcomers are enthusiastic. I feel optimism coming out of the pores of this place. It's a very happy place to be.

Jeannette's preaching and leadership and Kat's as well!. The Crossroads project was fantastic and preparing us.

A committed set of parishioners and alumni.

A strong sense of history.

A strong sense of place in community.

A commitment to outreach.

There is a group of people highly committed and dedicated to the church and ministry. (2)

There are people willing and able to contribute.

We have some ability for major donations.

It is long overdue!

We have a beautiful worship space and organ that needs this work to continue.

Significant recent growth and participation.

Significant increase in energy and optimism.

We have been thoughtful and realistic in making real plans for growth.

St. Luke's has the strongest prospects in comparison to other churches in the area.

People with resources are expecting this to happen.

There is a vibrancy that is reflected in growing participation and more people.

New families with young children.

Physically the church is beautiful.

Music program.

St. Luke's feels very relevant to me now and we should take care of it while we can.

Our rector's cheerful leadership.

8. What problems, if any, do you foresee for this project?

Comments:

The organizational gifts of the administration are challenged.

There is a small number of people with significant means.

This will only be successful if everyone supports this and gives. It cannot continue to be funded by a few.

We are a small parish to raise this amount of money.

Not everyone is able or willing to support it.

Community does not have the resources to support all the space for the future.

Delays in getting going on the work.

The building is the problem. Every problem leads to three more.

I wonder about people not wanting to support the campaign because they don't want to take care of the building.

I don't know how generous people can or will be.

9. What added ideas or suggestions do you have which might be helpful to the leadership in making this important decision?

Comments:

I would be immensely delighted if the nave were available for purposes beyond worship. Square dances, even a community center. We want to bring the world inside!
Don't lose sight of reaching out to alumni.

Continue to be transparent and communicative.

We need to be mindful of the future members and what we are expecting them to maintain.

We need to join with another Episcopal church nearby.

Proceed with confidence and don't wait for all the answers first; this is a worthy project and you cannot wait.

We need stronger leadership presence before the congregation. There needs to be persistent communication.

Go overboard with transparency and presence.

I am glad we have consultant assistance.

I hope there is some mechanism to convey to the congregation a sense of urgency about the projects.

Leadership

10. If asked, would you be willing to work on a committee in support of the proposed capital campaign?

 5 Yes 1 No 1 Not sure at this time

11. Among individuals you know, who would make an ideal CHAIR for this proposed capital campaign?

[The names of 20 individuals were suggested.]

12. Hypothetically, if you were a chair, who would you select to serve with you?

[The names of 24 individuals were suggested.]

Campaign Timing

13. Do you know of other current or projected capital campaigns in the community that might have an impact on the success of this proposed effort?

Respondents did not provide any responses to this question.

14. Does a proposed solicitation period for pledges in the fall of 2013 seem appropriate to you?

 6 Yes 0 No 1 No strong feeling

Gift Potential

15. How would you describe the present economic climate in your community?

 0 Excellent 7 Good 0 Fair 0 Poor

16. Is the present economic climate improving, remaining the same, or declining?

 6 Improving 1 Remaining the Same 0 Declining

17. To attain the proposed goal, substantial leadership gifts would be required. Are there individuals, foundations, or other sources who might support these proposed plans? (Please include mailing address, phone number, and email address if possible and please use the back of this page for additional space.)

Illinois Historic preservation committee

Landmarks Illinois

Evanston Historic – Carlos Ruiz might know of other places of support

Lilly Foundation

Music supporters who are non-members.

Ask Greg Jorjorian for alumni/connection prospects

18. Do you think a goal of \$2,857,354 (as outlined in the proposed plans) can be raised in gifts and pledges?

 5 Yes 0 No 2 Don't Know

If no, how much do you think can be raised?

19. If convinced of the need, would you be willing to contribute to this proposed campaign? (All gifts, regardless of size, are needed and are important to the success of the proposed campaign.)

 7 Yes 0 No 0 Not sure at this time

20. If "yes," please estimate your possible total range of giving. Gifts potentially could be paid over a several-year period. *This is not a pledge or in any way binding.*

<u> 0 </u> \$500 or less	<u> 0 </u> \$500 to \$1,000
<u> 1 </u> \$1,000 to \$3,000	<u> 0 </u> \$3,000 to \$5,000
<u> 0 </u> \$5,000 to \$10,000	<u> 1 </u> \$10,000 to \$25,000
<u> 1 </u> \$25,000 to \$50,000	<u> 0 </u> \$50,000 to \$100,000
<u> 2 </u> \$100,000 to \$150,000	<u> 2 </u> \$150,000 to \$250,000
<u> 0 </u> \$250,000 to \$350,000	<u> 0 </u> \$350,000 to \$500,000

Planned Giving

21. In addition to making a gift to the proposed campaign, some parishioners may wish to explore planned or legacy gifts. Check the blank next to the item(s) of interest. Materials will be sent to you from the Episcopal Church Foundation.

 0 Make a gift to your parish through a bequest in your will.

 2 Create a charitable gift annuity (minimum gift of \$5,000).

Benefits of a charitable gift annuity could include:

- receive guaranteed income for life (i.e. current rates of approximately 4.7% annually at age 65, approximately 5.8% annually at age 75)
- receive an income tax deduction now for the gift portion

- receive some tax-free income from the investment until your life expectancy age
- possibly reduce applicable estate and inheritance taxes
- enjoy the satisfaction that at the death of the final income beneficiary, the remaining principal would go to an Episcopal congregation or entity you designate

 2 Create a Charitable Remainder Trust with appreciated assets (minimum gift of \$100,000)

 1 Create a Pooled Income Fund gift for life (minimum gift of \$2,500)

 1 Donate appreciated real property such as a house, vacation home, farm or business

 2 Send me the *Overview of Planned Giving* brochure which explains planned gift options further

 0 Add me to the Episcopal Church Foundation e-newsletter on estate planning.

21a. 3 St. Luke's Episcopal Church is already in my will or estate plans.

Section Four:

Direct Mail / Online Responses

Results from 83 Direct Mail / Online Responses

Note: Not all respondents answered all questions.

Awareness of Need

- 1. Prior to this survey, were you aware that the parish was considering a capital campaign?**

76 Yes 3 No

- 2. Prior to this survey, were you aware of the needs as expressed in the accompanying proposed plans?**

53 Aware 3 Not Aware 24 Aware of some of the needs

- 3. Are there additional needs that seem important to you which are not covered by the proposed plans?**

Comments:

Reset the arch in the chapel.

Enclose the garth for year-around use instead of focusing on the entry.

Repair and restore windows in the church and Lady Chapel.

Restore the Hubbell Festival fanfare state trumpet.

We are interested in learning what plans there are for making the nave more adaptable for a variety of activities and programs. The fullest possible use of the nave for our ministries is important to us.

Establishing an endowment for building and program (other than music, please). I would prefer that as part of a capital campaign over a tithe to outreach. Outreach should remain part of annual giving (and it would be nice if more was local, fulfilling the unrealized vision of St. Luke's being a "presence").

Expanded programs for children not in the choir.

Generally, we believe a NEW community-centric, sustainable space for worship and gathering is preferable to restoration of the existing nave.

As a parent of young children, it is very important to our family that the parish house is a priority as well, for nursery accommodations for very young children and for education for older children and adults.

Redo the men's toilet room.

We need to remain keenly attentive to the spiritual and pastoral needs of our own community and the world beyond. Rebuilding St. Luke's is key to our continuity as a parish, but we are a community of spirit, not of bricks and mortar, or even stained glass.

Frosting on the cake would be improving acoustics in our space for hearing-impaired.

This is an important start. An elevator connecting our large gathering spaces to the nave level seems very important as well.

Accessibility to the Parish Hall; assessing the feasibility of adding an elevator or LULA.

Not sure if this has been covered, but the basement could use a total redo. From the kitchen through to the back "pantry".

Lighting.

Interest in and Support for a Capital Drive

4. Generally speaking, do you favor the parish conducting a capital campaign as outlined in the proposed plans?

 54 Yes

 4 No

 18 Yes, but with some concerns

Comments:

Based on past history, I am concerned the capital accumulated would be spent before it was used for the initial purposes.

The amount of money needed for the entrance lobby is overreach.

I assume this would be on top of (or in addition to) my current regular contribution?

Once a campaign is launched and publicized, anonymous/"angel" bequests may materialize as memorials to preserve landmarks or simply because someone was asked to donate to a worthy cause. Our reputation for music and liturgy is national and our recordings are frequently played on WFMT.

I have concerns regarding ongoing improvements and maintenance as these have been put off for the 20 plus years I have attended. There needs to be funds to support the building and grounds and this is the chance to establish that; program is an "easy sell" make this effort worthwhile!

Have environmental issues been addressed? Such as energy and water efficiency? Use of green/ recycled building materials?

Monies better spent other ways than maintaining an enormous aged structure for small parish.

We want to learn more about how we plan to more fully utilize the nave.

My concern is that St. Luke's has its identity so engrained in the building, and especially the organ, that the potential vision is limited by the limits and constraints of the building. While the campaign is necessary to keep the building, it represents more years of making the building the focus of the community. I have heard it said that without the building there would be no St. Luke's but I'm not sure that is what a Christian Community should be about today.

Concerns about how deep our pockets can possibly be for this kind of campaign.

The parish is not big enough to achieve this!

The amount of money required is not commensurate with the size of the congregation. (3)

I don't support including the tithe for outreach. In my opinion, this should not be mingled with the serious capital needs of our facility.

I believe the amount we are seeking may be beyond the means of our parishioners

5. Please indicate the level of priority you would attach to each of the projects outlined in the proposed plans by checking the appropriate line under each heading. At present, they are listed in no particular order.

**Select only one option per line and feel free to make comments (use an extra sheet if necessary).*

	PRIORITY				
	High	Medium	Low	Opposed	Lack Information
<i>Phase III:</i>					
a. Reclaiming full use of the Nave	<u>67</u>	<u>8</u>	<u>0</u>	<u>2</u>	<u>0</u>
b. Parish House Roof	<u>57</u>	<u>14</u>	<u>2</u>	<u>2</u>	<u>1</u>

c. Accessible Lavatories	<u>48</u>	<u>19</u>	<u>8</u>	<u>1</u>	<u>2</u>
d. Entrance Lobby	<u>13</u>	<u>33</u>	<u>21</u>	<u>6</u>	<u>4</u>
e. Parish House Assessment	<u>17</u>	<u>34</u>	<u>17</u>	<u>3</u>	<u>5</u>
f. Tithe for Outreach	<u>24</u>	<u>15</u>	<u>22</u>	<u>11</u>	<u>5</u>

Comments:

One handicapped bathroom is sufficient; we do not need three.

The nave is already handicap accessible. There is no need to expand the lobby.

Let's get our house in order before outreach.

All funds should be used to restore the church.

I support the outreach in the annual budget. I'm not sure that I see the need to include outreach in this focused capital campaign. It seems a gesture whose meaning is not going to be noticed or valued.

An assessment will not be helpful, or particularly fundable, without some plan to implement a date to do so, a vision of what it will mean.

With the exception of making St. Luke's more accessible immediately (re: item c), it is our feeling that the current state of disrepair is too great to warrant any investment in the existing campus. A complete rehab would result in a space that still lacks the resources attractive to a progressive faith community and therefore funds would be better spent building a new space.

Bathrooms should be in the entrance lobby

What is our thinking about the future of the parish house?

They are all important, that is why it feels like the ship has too many leaks to patch.

While the plan for the entrance lobby seems wonderful, I would think if anything had to be discarded from the total it would be that, since it is not a repair, but an addition. Could this still be added later in years to come after we recover from this go-around and have a chance to grow the parish?

While I understand the philosophy of the outreach tithe and was initially in favor, I currently believe the funds raised for a particular purpose should be fully focused on that purpose.

I was surprised to see the Ember Project as a tithe recipient; I know in the past there were some concerns about accountability. I fully support tithing to our mission ministries but I would like to hear if something has changed with Ember. If nothing has changed, I would like to hear why we are including them.

Although I understand the "theology" here, the fact is we give tens of thousands to the diocese which includes their outreach and thousands annually to the litany of ministries we recite every Sunday in the prayers of the people.

6. If the proposed total goal of \$2,857,354 cannot be fully funded by a capital campaign, how would you feel if the parish were to assume prudent long-term debt to ensure completion of these proposed plans?

20 Acceptable 47 Undesirable, but acceptable 10 Unacceptable

Comments:

We keep doing that over and over again.

We are operating in deficit now and cannot support additional expenses.

The capital campaign should focus on what the parish is willing to commit to and that would include what amount we can reach due to the size of our membership. Another campaign could be proposed in the future. In the future we will see where and how well our parish life is growing. There will be funds available for growth in other ways.

I would have concerns about this.

Is this possible?

Depends on the amount of debt.

I would try very hard to see if campaign can be accomplished without a loan; but if not, then we should get a loan.

I guess it depends on the definition of "prudent" and "long-term". If we can assume the parish will continue to grow, I think it would be acceptable. Also, some of the repairs will better enable us to grow the parish and to use the facility for other events.

Necessary if we are going to be relevant to the 21st century; let's go down in a blaze of trying our hardest.

7. In your opinion, what major positive factors does the parish have in its favor for the proposed campaign?

Comments:

Handicapped accessibility is a necessity; opening up the pews that have been closed off allowing seating for everyone.

Continuing to be a force of good for so many.

The obvious need to maintain this large and historic church.

Some dedicated members.

The physical church.

There is wide agreement that we must fix the nave.

The prospect of an improved worship space might attract new members.

Location, location, location.

It is a historic and beautiful structure.

A solid running start on contributions to building repairs, pretty good contacts with former parishioners, and a good case that repairs and improvements have been long neglected and are surely necessary.

High awareness about the state of the building. Good energy for the programs and worship inside the building.

For the most part, the proposals need to be done and are not frivolous or cosmetic.

The parish is enthusiastic and growing.

There seems to be a committed contingent in support of the project.

I think the needs are obvious and have been discussed at length in many Crossroads Meetings.

A handful of families have the emotional connection to “historic” St. Luke's and the resources to make major contributions to rehabilitate the nave and related spaces.

We seem to be a discerning parish. We take steps instead of plunging in. We listen. These are all strengths of a caring community.

A committed congregation and a beautiful historic neighborhood church that needs to be saved. St Luke's is well known in the community, particularly through music.

There is a wonderful, youthful, growing, and vibrant spirit present in the congregation these days.

We have been able to raise funds without a formal campaign.

The nave is so acoustically (also architecturally and theologically) outstanding that St. Luke's is known to a very wide range of people who have attended concerts here. Hopefully they might be contributors also.

A few people will have to pay half or more of the goal. Some money will come in through will beneficiaries.

It is a well thought out plan.

A permanent fix to an old problem, the congregation is growing, more families are attending, and we have strong and inclusive leadership.

A core of dedicated parishioners that seems to be growing (if slowly); parishioners who seem to recognize the importance of the worship space itself in awakening, shaping, and nurturing faith and practice; and spaces worth preserving.

Active, and engaged membership.

The level of engagement of parishioners in active ministries and service. We need to reclaim the building in order to adequately support those ministries.

With a clearly labeled need sheet by amount donated, it makes the large amount of money needed seem more approachable, especially broken down by how much a \$500 donation would cost each month for example!

St. Luke's current overall health as a community is as good as we've seen it in 30 years.

This is a generous and giving parish that responds well to open communication about the challenges it faces. Members seem willing to take educated risks.

A beautiful building that needs to be restored.

We're in a vibrant neighborhood so there are many potential new members nearby. (The flip side is that people tend to move in and out of this neighborhood, so many new members do not stay long). A magnificent building that draws people and a strong music program that also draws new members.

The parish has seen renewal and growth over the past decade. We have a committed group of parishioners that see St Luke's as their church home and have explored many options before coming to this point. This group will do everything feasible to help the church continue with its mission.

Not only does it allow continuing use of the building, but adds possibility for additional future use.

A vibrant but small, semi-urban parish with affection for the worship site and deep connections to it.

The commitment of its parishioners, some wealthy members, and the tradition of the church as an irreplaceable center of worship, music and culture.

We are committed to maintaining and improving the beauty of this blessed institution.

To return the facility to working order.

Obvious and visual evidence of the need to complete the work, along with a dedicated church community.

It's so clearly necessary. There is also a large pool of former members who left angry or disappointed who still love the church building, organ, and music program in particular.

Location, accessibility to public transportation, stature and history of the building, potential for future uses of the building by the congregation and others, acoustics, the music program, a willingness to address this issue, and a willingness to grapple with change.

Long-standing members and new families.

It is a wonderful place, diverse in many ways (though not all possible ways); the involvement quotient of parishioners has increased tremendously over the past eight or so years. Younger parishioners (late 20's/30's) who may not have the financial capabilities of some of the more mature parishioners have been extremely generous with their time and talents. All of this coming together has contributed to a stronger connection among parishioners who are nourished to then go out into the community.

A sense that these repairs are needed and that delaying them will just cost us much more in the future.

A very engaged parish community.

An innovative population who have been engaged in the process.

Positive feelings about the parish among the congregation.

The potential to use space for music events.

A beautiful, if somewhat run-down, building.

Its acoustics and organ.

We are unique in Evanston as an Episcopal church.

Thoughtful and inspiring preaching, uplifting worship, and a broadened age group.

Protecting the building from the elements is long overdue. We did not address these issues when they were small and now need to pay for resolving big issues. A capital campaign is essential for a goal of this amount. To divert smaller funds from our operating budget on an ongoing basis is not sustainable.

A strong congregation (though I have no idea of the financial capabilities) and a long-standing place in the history of the Evanston community.

Engaged membership, and strong leadership.

Fran Bushhammer.

The commitment of parishioners to support and expand the use of St. Luke's for church-related and other community events and activities.

Inspiration to extend St. Luke's as a gathering space for the community and variable "celebrations of life" as one parishioner at the March 17th meeting put it.

Exceptional leadership from the rector, clergy team, and vestry in addition to clear communication with parishioners.

Great devotion by the parishioners to the physical space of worship.

8. What problems, if any, do you foresee for this project?

Comments:

Incurring major debts.

The estimates are excessive.

Getting people to pony-up the money.

There are uncertain financial situations for many.

The size of the project and the fluctuation in the number of communicants and membership.

Not enough members with deep pockets.

It is too ambitious.

I don't think we can raise enough money to do it all.

Still no parking lot and little handicapped parking.

Perhaps there is more enthusiasm around the parish than I am aware of or connected to. For me, this is a low-energy period and it is difficult to get excited about giving even more money than usual.

The challenge of raising the money.

It is still challenging to fundraise in this economy.

Not strong enough annual giving, no community presence as a resource, no vision for the parish in the community, and disparate and unfocused outreach (people's pet projects, no strategy).

The amount needed may outstrip the financial capacity of the parish.

Is there enough capital support?

The economy hinders some people's ability to give. They say the recession is over but that is not entirely the case.

Overwhelmingly, our biggest concern is that the \$2.8 million campaign is a large "band-aid" and major additional work will be needed within the next 5-10 years. Should the current project be successful, it moves us farther in a direction (of rehab vs. replace) that stresses the finances of our parish rather than alleviating them.

Unforeseen additional expenses.

The proposed amount will not be enough and additional needs/costs will arise.

We would need to make sure people don't feel seen only for their possible monetary contributions.

Asking those folks who have given substantial funds in the near past to AGAIN contribute to a formalized strategy/plan.

The salaried people in the church are stuck with an overwhelming financial responsibility. When any new people are brought in, as with a priesthood change, they would start with an overwhelming burden. It seems to be such a large sum that I would think we would be talking about, and focusing on, nothing else for years. Better, perhaps, to leave some crumbling.

Cost estimates and overruns, pledges not fulfilled, years of work on the nave which may prevent full usage and therefore limit the growth of the parish. Also, unexpected additional building problems.

A lack of consensus about what the church is and where it should be going, which could weaken parishioners' will to see the campaign through.

Inability of members to come up with the necessary money.

We might have to do the capital campaign in phases, but this should not be seen as a defeat.

We might fail to fund it adequately. It may impinge on annual giving.

With a few exceptions of well-off major donors, our parish consists of people varying from those who are financially comfortable, to those who have to use significant portions of their incomes to support their families day-to-day, to some who live on the edge of need. I am concerned that our parish will not be able to respond with funds in the amount needed to assure the success of the capital campaign.

It is a lot of money for a parish that doesn't seem to be growing.

I worry that Evanston cannot support four Episcopal churches, given the downward church attendance nationally. This money would be a lot easier to raise if our congregation were twice as large. The Gift Chart shows several gifts of greater than \$100,000. In fact, these constitute the majority of the money to be raised. I have no idea if there are members of this congregation capable of such gifts. If the vestry is aware of such members, I would feel more comfortable. If this is simply a sort of "dream" wish list, then I am worried.

The scope of the project is overwhelming. Due to neglect from previous eras, this group is having to shoulder a tremendous burden. I hope that we will be up to the task.

I doubt that the St. Luke's community, at its current size, can fund this total on its own and I doubt that there will be enough outside donors, even former members and lovers of the organ, to make this campaign successful.

It will require major flexibility during construction, meeting capital fund goals, and possible cost over-runs even if capital fund goals are met.

Basically, money! Our mainline Protestant denominations continue to decline in numbers. We will probably never be the size congregation needed to care for this space so let's think about succeeding generations many years from now.

Lack of funds.

The cost seems way too high.

Meeting the financial commitment.

The limited resources available to many parishioners and the length of time required to complete funding and stage work.

Having to court big donors who may feel entitled to more influence; keeping the church going during construction; making the church not change so drastically that it has a very different feel.

A loss of momentum.

Competition for financial resources.

Some folks will not have the financial ability to contribute a lot or will worry about feeling pressured to give more than is prudent. Some folks may argue that we should only invest time and money outward into the community, rather than amongst ourselves.

The possibility that once work starts we will find other issues that were not included in the projections.

A rather financially modest population. Only a small, small fraction can make capital gifts.

The ability to raise the money in a still somewhat uncertain economy.

Members of the parish leave instead of arguing.

There is always the unknown.

Nothing insurmountable. The ability to raise funds, of course, but in the past we have always raised whatever we needed to. The necessity of closing of certain areas at time of construction, but we have always shown forethought in having secure alternatives for use in place.

Finding the money to do it all. We may have to prioritize and that may be difficult.

Sustaining interest and giving over three years. Fundraising fatigue towards the end.

The difficulty of suspending "celebrations of life" as well as worship services in the nave for an extended period of time.

9. What added ideas or suggestions do you have which might be helpful to the leadership in making this important decision?

Comments:

Continuing communication with the parish on all phase and thoughts on this project. You have made a good start.

Have fundraising events like lectures, concerts, tours of the church, dinners and sales.

Encourage people to give memorials for their loved ones.

Focus on the changes that need to be done like the roof and accessible lavatories.

Be prepared to adjust plans according to financial capacity.

A full rebuild proposal, even a “rough sketch” should be presented in contrast to the rehab proposal. More specifically, we would be interested in the "\$6 million tear-down and rebuild" concept (if one exists or could be created) to understand what St. Luke's “could” look like in 10 years, for example.

\$2,857,354 is an unrealistic number; we all know we cannot be that exact. It's very likely to grow. Reflect that reality by rounding up to \$3million or even \$4 million.

Continue to keep the excellent communication going.

Make the campaign very public and, in the spirit of saving a historic neighborhood church which is a place where all are truly welcome, request donations at choir/music events (include a brief version of plans and campaign in the program each time and a timeline of progress).

Make sure all people, regardless of their ability to contribute with money, feel they are a part of the building of this campaign.

Give more emphasis and information on leaving a gift to St. Luke's in one's will/estate. So many choral and instrumental organizations use St. Luke's for its outstanding acoustics. We should judiciously ask concert attendees to join us in financing this refurbishment.

Perhaps another follow-up survey with some more questions and suggestions that this survey will uncover? I would also suggest that in another blind survey (if that is possible) we ask how much could each of us, because of our individual circumstances, actually be willing and able to give.

St. Luke's currently has a choice regarding the fiscal management of a core of aging, dedicated and moderately wealthy parishioners. This campaign will represent "legacy" gifts from numerous families which may or may not be around in next 5-10 years. Is the restoration of the building the most compelling story we can ask them to tell?

Prioritization of phases will be critical; constant communication during the campaign and construction will foster inclusion and momentum.

Guard against letting this campaign (or anything else) take precedence over the mission to proclaim, by word and deed, the Good News of God in Christ as handed down to us by His apostles and their faithful successors

Do not take counsel of your fears.

Keep communicating. Everyone buy lottery tickets.

I, unfortunately, do not have any visionary suggestions but I think the leadership has taken a very important step in consulting with the parish through this survey. Continuing open communication is essential. Thank you for taking this step.

None of us want to be part of "The United Episcopal Church of Evanston"but why not? I'm playing the devil's advocate here, but I wonder if this might not be what will need to happen someday, hard as it sounds.

If a loan is taken out to fund repairs, perhaps having a breakdown on what would be required of the members of the parish to repay the loan is needed.

It seems like a lot of money for a facility that is only used very few hours a week. Find meaningful ways to better use the nave or consider an alternative plan.

Keep the process transparent. Keep up parish and worship programming to reinforce importance of the church as a center for the spiritual, intellectual, and fellowship.

Continued excellent communication will be necessary, along with excellent planning especially for worship or we will lose members.

Clearly state what the alternative to a capital campaign looks like.

Show the long-term consequences of debt and how they will place a stranglehold on church mission and programs.

I believe that nourishment at home (in this case, the parish) leads to good works (better works) beyond home. It's important to encourage people to stretch a little but not to pressure people unduly. It's important to involve friends of the parish who have moved elsewhere but still have strong positive feelings about the place so when they come "home" to visit they find a vibrant place that is not literally falling down around them.

Have we considered reaching out to the neighborhood, not necessarily parishioners, to donate to the campaign? I would think the neighbors would have an interest in keeping the beautiful building in their midst, even if they are not parishioners.

Are we using outside consultants to help? People from the "corporate" world with great experience and innovative ideas?

Prayer, fasting, and listening to the voice of the Holy Spirit.

I question the necessity of a warming kitchen. Could we have lockable doors installed for the basement dining area (off the kitchen) and the Great Hall so traffic can still go back and forth to the kitchen and secure the rest of the parish house? Or if you wanted the bathrooms downstairs to still be accessible, could we have lockable doors installed at the bottom of the two sets of stairs so traffic can get to the kitchen and bathrooms but no accessibility to anywhere else? Perhaps an usher could be assigned downstairs to direct traffic during special events. Might this be less costly than a warming kitchen?

Is there any way to reach out to "alumni" of St. Luke's? People who may no longer live in the area (or perhaps still live in the area but no longer attend) but feel strongly enough about the building and their experience here that they might contribute?

Share more than you think you need to, more regularly than you think you should.

It is undoubtedly planned, but clear dissemination of the Feasibility Study findings would be helpful to determine whether and by how much the campaign may fall short of reaching its goal.

Make sure we do a thorough job of outreach to "old St. Luker's" and be sure we are still in their plans.

Leadership

10. If asked, would you be willing to work on a committee in support of the proposed capital campaign?

16 Yes 25 No 34 Not sure at this time

11. Among individuals you know, who would make an ideal CHAIR for this proposed capital campaign?

[The names of 18 individuals were suggested.]

12. Hypothetically, if you were a chair, who would you select to serve with you?

[The names of 49 individuals were suggested.]

Campaign Timing**13. Do you know of other current or projected capital campaigns in the community that might have an impact on the success of this proposed effort?**

Chiaravalle Montessori School

Connections Street Wise

Evanston Public Library and Friends Organization

Northwestern (2)

Noyes Cultural Center

Several theaters Connections Street Wise

No, and in my experience other people's capital campaigns have little cross-over impact. What impact there may be relates to timing of gifts, not their amount.

No. But in comparison to other efforts I support that help the poorest of the poor, it is hard to justify larger amounts allocated to physical space. That said, the physical space of the church is very important to the parish.

14. Does a proposed solicitation period for pledges in the fall of 2013 seem appropriate to you?

49 Yes 4 No 22 No strong feeling

Gift Potential**15. How would you describe the present economic climate in your community?**

1 Excellent 36 Good 34 Fair 3 Poor

16. Is the present economic climate improving, remaining the same, or declining?

40 Improving 28 Remaining the Same 6 Declining

17. To attain the proposed goal, substantial leadership gifts would be required. Are there individuals, foundations, or other sources who might support these proposed plans?

(Please include mailing address, phone number, and email address if possible and please use the back of this page for additional space.)

RRF might help with accessibility; has a grant process for that- rrf.org

Mazza Foundation

M Hoover family foundation

John and Lynn Rowell. Email is johnrowell@charter.net Address: 309 Belmont Avenue Greenville, SC 29601

North Shore Choral Society- www.northshorechoral.org - Bela Voce A Cappella Choir

I trust that the local foundations are being looked at, as well as The Foundation Center, etc, being contacted.

No specific people, etc., but cast a wide net. People all along the north shore have historical links to St. Luke's and many have the resources to help make sure the building does not disappear.

The Retirement Research Foundation (RRF) has a competitive program for Accessible Faith grants to make houses of worship more accessible (but only for that aspect of the Capital Campaign). However, if a complete overhaul of a building is happening, St. Luke's may not be eligible, since new construction requires accessibility features anyway. Someone at St. Luke's would have to talk to the Accessible Faith contacts at RRF to learn the specifics. They are either Shelley Sandow (Sandow@rrf.org) OR Naomi Stanhaus (Stanhaus@rrf.org).

Architecture buffs in the neighborhood would be into this IF there were a way to give them a stake in this effort. Are there special tours you could give? A special dinner with the architect to offer? I would suggest an indiegogo campaign for the neighborhood where they can pledge and get various benefits for the pledge. (Kickstarter requires that you raise the full sum before you get anything, whereas on Indiegogo, you can keep whatever money you raise even if you don't get to your goal.

18. Do you think a goal of \$2,857,354 (as outlined in the proposed plans) can be raised in gifts and pledges?

 15 Yes 10 No 50 Don't Know

If no, how much do you think can be raised?

\$1.5 million (2)

Half the amount.

To complete it all it will have to be done in stages.

**19. If convinced of the need, would you be willing to contribute to this proposed campaign?
(All gifts, regardless of size, are needed and are important to the success of the proposed campaign.)**

63 Yes 2 No 9 Not sure at this time

20. If "yes," please estimate your possible total range of giving. Gifts potentially could be paid over a several-year period. *This is not a pledge or in any way binding.*

<u>10</u> \$500 or less	<u>14</u> \$500 to \$1,000
<u>9</u> \$1,000 to \$3,000	<u>12</u> \$3,000 to \$5,000
<u>4</u> \$5,000 to \$10,000	<u>11</u> \$10,000 to \$25,000
<u>0</u> \$25,000 to \$50,000	<u>2</u> \$50,000 to \$100,000
<u>1</u> \$100,000 to \$150,000	<u>0</u> \$150,000 to \$250,000
<u>0</u> \$250,000 to \$350,000	<u>0</u> \$350,000 to \$500,000

Planned Giving

21. In addition to making a gift to the proposed campaign, some parishioners may wish to explore planned or legacy gifts. Check the blank next to the item(s) of interest. Materials will be sent to you from the Episcopal Church Foundation.

3 Make a gift to your parish through a bequest in your will.

1 Create a charitable gift annuity (minimum gift of \$5,000).

Benefits of a charitable gift annuity could include:

- receive guaranteed income for life (i.e. current rates of approximately 4.7% annually at age 65, approximately 5.8% annually at age 75)
- receive an income tax deduction now for the gift portion
- receive some tax-free income from the investment until your life expectancy age
- possibly reduce applicable estate and inheritance taxes
- enjoy the satisfaction that at the death of the final income beneficiary, the remaining principal would go to an Episcopal congregation or entity you

designate

- 0 Create a Charitable Remainder Trust with appreciated assets (minimum gift of \$100,000)
- 0 Create a Pooled Income Fund gift for life (minimum gift of \$2,500)
- 0 Donate appreciated real property such as a house, vacation home, farm or business
- 4 Send me the *Overview of Planned Giving* brochure which explains planned gift options further
- 2 Add me to the Episcopal Church Foundation e-newsletter on estate planning.

21a. 8 St. Luke's Episcopal Church is already in my will or estate plans.

A Final Word

The Episcopal Church Foundation thanks the leadership of St. Luke's Episcopal Church for the opportunity to work with the parish family. We enjoyed our work on your behalf and would welcome the opportunity to be of service.

Thank you, and best wishes.

Section Five:

**Appendix I:
Tentative Case Statement**



St. Luke's EPISCOPAL CHURCH

Total Proposed Capital Campaign Goal: \$2,857,354

Capital Needs Committee

The Very Rev. Jeannette DeFriest,
Rector

Linda Winter
Sr. Warden

Mary Pat McKeown
Jr. Warden

Timothy O'Brien
Treasurer

Debora de Hoyos
Nave Committee Chair

Gregory Jorjorian
Nave Committee Chair

Scott Romans
Crossroads Committee

Jane Young
Buildings and Grounds Chair

Francis Bushhammer
*Buildings and
Grounds Chair
Vestry*

After our patron, St. Luke, we strive to proclaim the love and healing power of the Gospel of Jesus Christ through our ministry and mission. St. Luke's is a welcoming, inclusive congregation, centered in liturgy and focused on formation and discipleship. St. Luke's has a history of service and is committed to outreach well beyond our walls.

St. Luke's was founded in 1885 as a mission church to serve the expanding suburb of Evanston. Work began on our present structure shortly after the turn of the 20th century, with services being held in the partially completed church in 1906. In 1910 the Lady Chapel was completed and shortly after, the nave rose to its final height. In 1920 the Parish House was built to serve the needs of the expanding congregation. During the Great Depression St. Luke's lost a substantial part of its endowment, halted work on the building, and focused its remaining assets on relief, leaving the church unfinished. A large tower and entrance lobby / narthex had been planned for the Hinman street entrance, and additional second floor choir and meeting rooms had been anticipated on the north and south sides of the church building.

St. Luke's continued to focus on mission and ministry and, because of its sturdy construction, the building did not require much attention. As the campus turned 70 it was time to conduct significant repairs and make improvements. A boiler fire had left the interior of the building stained with soot; in 1985 a complete cleaning and res-

toration of the church interior was undertaken, the worn pews were replaced, and the original temporary brown glass west window in the nave was replaced with the current, brighter, diamond-paned window. The large art glass window at the east end of the nave was restored. In the 1990s a full restoration of E.M. Skinner's Opus 327 organ was completed and the roof over the organ loft replaced. Since commissioning of the 2002 Inspired Partnerships building conditions report, St. Luke's has invested just over \$1.2 million in upgrades and repairs to the campus.

By 2006 the masonry walls and many of the roofs and gutters had started to leak, and water infiltrated deep into the walls. That moisture, in combination with Evanston's freeze and thaw cycles, had damaged the limestone on both the interior and exterior of the church, creating loose pieces of stone that had the potential to dislodge and fall. It also damaged the interior of the Lady Chapel, walls and floors in the north rooms, and other areas throughout the campus.

In 2008 a fist-sized piece of limestone fell three stories from the north upper windows

continued...

of the church into the pews below. This incident had two significant outcomes for St. Luke's. First, it renewed concerns about building safety and conditions. Second, it provided the catalyst for the congregation to examine every aspect of its life together and in the building. The congregation has done this through the Crossroads process. An initial step of the Crossroads process was to define our options regarding the cam-

pus and determine a path forward. Using detailed, credible information, the people of St. Luke's decided that the best and most affordable option was to stay in our current campus and make the necessary repairs to the buildings.

The falling limestone came from high up in the north clerestory just under the ceiling of the nave. The 1916 brown glass

windows there were meant to be temporary and were to be replaced by pictorial art glass windows like those opposite them in the south clerestory. These temporary windows, long past their useful life, allow water to enter the building during severe storms. A large section of pews in the nave has been roped off since the initial stone fell in 2008.

In order to address building issues, St Luke's has adopted a phased approach:

Phase I: 2007 *Completed and Paid*

Emergency masonry repairs and stabilization of west facade with stainless steel mesh and strapping.

Phase III: Proposed

In October 2011, the Building and Grounds Committee and church leadership determined that **Reclaiming Full Use of the Nave** should be the guiding priority for Phase III repairs. The goal is to complete both interior and exterior repairs to the church, ending water infiltration and stabilizing the masonry. Several project components are meant to improve the hospitality, accessibility, and safety of the campus. *This will be a multi-year repair effort requiring a multi-year commitment from the community.*

Phase II: 2009 *Completed and Paid*

Replacement of the majority of the roofs and rebuilding of associated gutters and downspouts; additional masonry repairs in areas adjacent to roof.

Summary of Phase III Projects and Costs

What we have done so far: *\$513,284 (funded by early capital gifts)*

- Rebuilding the west exterior facade of the nave
- Lady Chapel repair and structural evaluation

Parish House Roof: \$42,782

The large flat roof over the Great Hall is leaking and shows signs of rotted decking. The roof is over 30 years old, well past its useful life, and needs to be replaced before it fails entirely.

Reclaiming Full Use of the Nave: \$1,219,950

- Exterior masonry repairs of the north, east, and south walls
 - Masonry repairs to all the interior walls of the nave
 - Replacing the deteriorated upper clerestory windows on the north side of the nave
 - Replace the small roof over the Resurrection (south) Altar
- The cost figure also includes funds for protecting all interior assets, especially the organ, during repairs and thoroughly cleaning after repairs are complete.

Accessible Lavatories: \$309,000

In keeping with our long-term goals of accessibility, security, and hospitality, the vestry determined that we needed a set of modern, accessible lavatories on the same level as the nave floor. Our current lavatories in the basement of the Parish House are inadequate and hard to find, and our handicap lavatory does not meet current accessibility standards. We contracted with a local architecture firm to explore the feasibility of building appropriately sized lavatories in the unused space on the north side of the nave and to develop preliminary plans and cost estimates. In addition to the fully accessible women's and men's bathrooms, the plan includes a family bathroom and a small warming kitchen. Having lavatories and a warming kitchen in the church building would allow us to keep the Parish House closed during events in the nave, making the campus more secure.

Entrance Lobby: \$900,000

In order to make the church more welcoming and create additional space for meetings and receptions, a large entrance lobby is proposed for the Hinman entrance to the church. The lobby would allow us to address accessibility issues by making accommodating transitions among the Lady Chapel, the church, and the outdoor courtyard. We would also be able to open up several brick-filled doorway arches on the west end of the nave, creating views into the church from the lobby and street. The lobby would protect the walls and foundations that were originally intended to be inside the planned, but unbuilt, tower and narthex from further exposure to the elements and eliminate a significant route of water infiltration in the nave and Lady Chapel.

Parish House Assessment: \$19,200

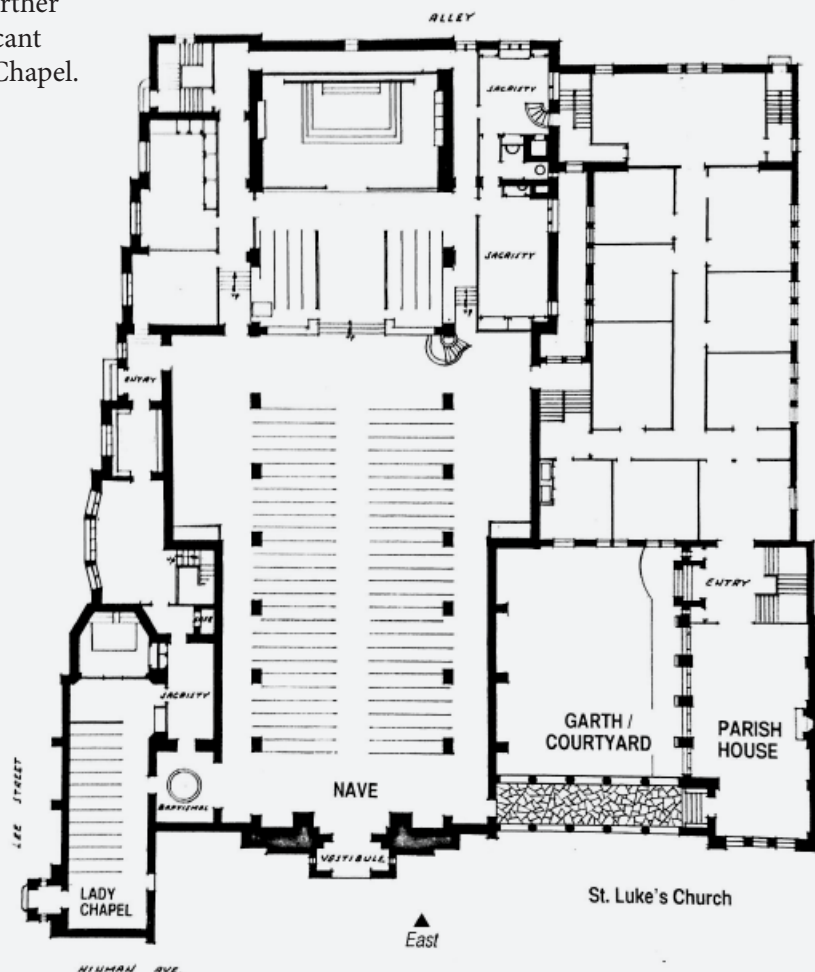
A thorough engineering evaluation of the Parish House would be commissioned to use as a tool for future planning.

Capital Campaign Expenses: \$60,000

These funds would cover the consulting fees and administrative expenses incurred in running the Capital Campaign.

Tithe for Outreach: \$306,422

The Vestry will direct 10% of the funds from this campaign to outreach and mission. St. Luke's dedicated the tithe from the roof campaign to mission ministries including the Seraj Library Project, Ember Kenya Grandparents Empowerment Project, Cathedral Counseling Center, U.I.C. Community Clinic Network, Family Matters, Connections for the Homeless/Hilda's Place, Youth Organization Umbrella and Cathedral Shelter.



*Total projected Capital Campaign \$3,370,638 including the outreach tithe.
\$513,284 has been raised and spent for building repairs leaving us \$2,857,354 to raise.*

Gifts Essential Chart

This chart illustrates the size and number of gifts necessary for a successful \$2,857,354 capital campaign.

Size of Gift	Number Needed	Cumulative Total	Monthly (Over 3 yrs.)
\$500,000	1	\$500,000	\$13,889
\$350,000	1	\$850,000	\$9,722
\$250,000	2	\$1,350,000	\$6,944
\$150,000	3	\$1,800,000	\$4,167
\$100,000	4	\$2,200,000	\$2,778
\$50,000	5	\$2,450,000	\$1,389
\$25,000	7	\$2,625,000	\$694
\$10,000	8	\$2,705,000	\$278
\$5,000	10	\$2,755,000	\$139
\$3,000	12	\$2,791,000	\$83
\$1,000	14	\$2,805,500	\$28
\$500	15	\$2,812,000	\$14
\$500 or less	Many	Goal Achieved	Variable

Capital Campaign Prayer

Gracious God, source of light and life, you call your people to gather under the stars, in the wilderness, near the ark, and around the altar. We are blessed to receive this church, built by bold dreams, generous hearts, and skilled hands. Through this place has flowed a century of prayer, worship, and passion for taking the Gospel into the world.

Be our abundant source of creativity, generosity, and gratefulness as we repair and reclaim our gathering space through this campaign. In the name of you, who creates, redeems, and inspires, *AMEN*.