

Feasibility Study Report

Trinity Episcopal Church

Collinsville, CT

June 9, 2103

The Rev. Linda M. Spiers
Trinity Episcopal Church
PO Box 374
55 River Road
Collinsville, CT 06022

Dear Rev. Spiers:

We wish to extend our thanks to all for the cooperation and support extended to our consultant and staff throughout the feasibility study process recently completed.

A total of 93 units participated in the survey by being personally interviewed, or completing questionnaires received online or in the mail. This represents an excellent total response rate of 52% among the members of the parish community that were contacted.

Now important decisions can be made to continue the momentum essential to the success of a proposed campaign. We welcome the opportunity to continue to work with you during the exciting phases of growth and development which lie ahead.

Faithfully,

Louise M. Baietto
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Feasibility Study Table of Contents

Letter of Introduction and Appreciation.....	2
Table of Contents	3
Feasibility Study Methodology.....	4
I. Introduction	4
II. Elements of a Successful Campaign.....	6
Composite Analysis and Summary.....	7
Recommendations	30
Tentative Case Statement	

Feasibility Study Methodology

I. Introduction

For some time the leadership of Trinity Episcopal Church has been evaluating the parish's programs, facilities, and resources, and assessing the ministry opportunities before the parish. 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 parish to support financially these identified needs.

The facts, findings, and recommendations of the resulting survey, now completed, provide a 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.

STATISTICAL NOTE:

- ◆ A total of 130 direct mail questionnaires were mailed to the parish community.
- ◆ Of those, 48 were returned: a mail response rate of 37%.
- ◆ A total of 38 online questionnaires were e-mailed to the parish community.
- ◆ Of those, 34 were returned: an online response rate of 90%.
- ◆ Including the 11 who were personally interviewed, 179 units were exposed to the study. Of those, a total of 93 units or 52% participated.
- ◆ Based on experience, this response rate is an excellent representative involvement from the parish community, lending credibility to the study findings.

QUALIFIER QUESTIONS:

How frequently do you personally attend services at Trinity?

44 One or more times per week

37 Two to three times per month

5 Monthly

5 One to four times per year

2 Less often or not at all

Which of the following best describes your current monetary giving status as a parishioner at Trinity?

- 65 Have pledged an annual amount to the church in 2013
- 6 Tithing
- 12 Donate just during Sunday services when the plates are passed
- 4 Some other form of regular financial support
- 6 Currently do not support the church financially

Thinking about the various organizations and charities you choose to support each year, which of the following best describes your commitment to Trinity?

- 2 It is the sole organization or charity I support
- 54 It is the most important organization or charity I support
- 32 It is in the top five organizations or charities I support
- 1 It is an important organization or charity, but not in my top five
- 4 I do not currently support Trinity Episcopal Church

II. Elements of a Successful Campaign

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

1. Recognition and acceptance of the proposal as expressed.
2. Awareness within the parish to the proposed plans
3. Availability of strong financial leadership.
4. Projected timing of the campaign.

These elements are reviewed in this report.

Composite Analysis and Summary

Total of 93 Responses

Note: Not all respondents answered all questions.

Awareness of Need

1. Prior to this survey, were you aware that Trinity Episcopal Church was considering a capital campaign?

87 Yes 6 No

Ninety-four percent were aware that Trinity 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?

34 Extremely Aware 26 Very Aware 18 Aware
12 Not very Aware 3 Not at all Aware

Thirty-seven percent of the respondents were extremely aware of the capital needs of Trinity Episcopal Church. Another 28% were very aware and 19% are aware of the needs. Thirteen percent were not very aware of the needs and only 3% were not at all aware. 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?

Comments:

Is roof repair needed?

Are we putting too much emphasis on the building and its preservation and not enough on spending money on actual important spiritual questions?

Why is the cost of ECF not listed?

Why is vinyl siding not a possibility? (2)

The church needs love and care.

More office building cleaning hours.

Addition to office staff for vacations and holidays.

The future of the church as we know it so that plans beyond maintenance can be made accordingly.

Endow staff positions like Christian formation.

Higher toilets or handle bars to accommodate elderly/handicapped.

Sustainability, e.g. "green" approaches to the proposed renovations. For instance, geothermal energy or solar panels, plans for composting waste, and so on and on.

Hardwood floorings need repair and refinishing or, if necessary, replacing.

Consider replacing the pews.

How will cost overruns be handled?

Convert the furnace and stove over to natural gas.

Security improvements must allow for securing the preschool during school hours.

We need to attract more participating parishioners.

A general emergency fund.

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?

 59 Completely Favor 26 Somewhat Favor 3 Somewhat Disfavor
 1 Completely Disfavor

More than half, 66%, are completely in favor of the campaign, with another 29% somewhat in favor. Another 3% somewhat disfavor the campaign and only one respondent completely disfavors the campaign. This is a sign that the church community is willing to support a campaign.

Why do you feel this way?

I don't necessarily agree with the size and scope of the campaign. We only have so much money and some of these projects are not necessary.

It's a fine line. When a newcomer arrives and sees repairs need to be done they may say "I better not join here, it's going to cost me down the line" or a newcomer who arrives and doesn't want to attend because it needs cosmetic attention.

There are a lot of repairs that need to be done. We question if the time is right as the economy is still recovering.

We think that we could have used the talent of the church to collaborate on the capital campaign logistics, rather than hire ECF to work on the campaign.

We can live with change to things like the bell tower. We worship God not the church. We want the people to be the focus, not the building.

Can we consider siding? And why carpet? Some things require more maintenance down the line.

Can we apply for a grant for the handicap access elevator?

As far as entrances and stairs, do what is needed to make things safe. Be creative. Change things if you need to.

We could all work together as a group on the parking lot.

I am in favor of maintenance. Why has it been put off so long? We had opportunities to maintain the property better since the last campaign; we have been very lax. Our chief concern should be to repair this building and create a maintenance fund to continue supporting the building correctly over time.

It's about time. We need to perform maintenance on a regular basis and, like your home, we should protect our assets.

Our exterior is very important.

I don't think the furnace needs to be replaced or expanded, just improved and maintained.

Things which are not up to code, or safe must be addressed.

The bare minimum kitchen has served us just fine all this time; but the nursery school should have air conditioning.

Could we use a smaller stair/deck back there? No one uses those stairs.

There's no Sunday school in the summer; I don't seem much need for air conditioning in the Sunday school.

This NEEDS TO BE DONE!

Why is the bell tower so expensive?

Can we consider putting more parking in front of the church?

We're torn. It's not easy to say yes to this. When you talk about people, as part of the church, you want to support the church but to focus on the cosmetic enhancements of the building doesn't seem to fulfill our mission. A family who has been immersed here, for all their lives, may not be able to see that holding onto a building is not always a possibility. The church is not a building. It should be changeable and flexible.

We hope that you will replace the carpet.

Maintaining the place you reside is the most important piece of strategy. We're sad to see some of these things have not been done over time. We'd like to see better management of a church we call home.

We had considered other churches simply because of the smell in the sanctuary, but Linda's presence as rector convinced us to stay.

We would like to see two capital campaigns; one for important functional and safety items and then one for other things which are less urgent.

Why is the roof not listed?

Concerned about the price quotes and estimates.

I want to learn more about the issues with the phone and computer systems before investing in it.

When I look around I see people working hard to maintain the church at a basic level and I want to see some of that burden lifted. Maintaining something like this building requires effort.

Most items are maintenance and that is not really a choice, it is a necessary part of any building.

Based on condition of asset, work needs to be done to protect. That said, I do feel the Episcopal Church has assets throughout the valley/state that should be part of a study on allocation based on areas, membership, etc. to best use or liquidate those assets in an attempt to make financial sense versus each parish operating on their own, given the cost needed.

The church needs to be maintained and the recommendations are not extravagant. Taking care of some of the items on the list will help save money on the operational costs of Trinity.

The goal of the capital campaign was not clear to us. There is usually a specific need to get behind (new addition or move to new building).

It is vital to the long-term viability of the parish. This is our spiritual and community home and must be cared for in the same way as we all take care of our own homes.

It is important for the church to maintain its property so repairs need to be made. (2)

I think we need to have this campaign but I have reservations. First is the ability to raise this kind of money. The second is, it is extremely obvious that the Episcopal Church must change or die; so will this be money well spent over the long term?

Everything described is necessary, but the cost is overwhelmingly scary! (2)

The buildings need to be maintained and the church does not have funds for current maintenance or future maintenance,

I want the parish to have a future and a viable home for that future. The older part of the building is a historic treasure for the Canton community as a whole and we should preserve it for that reason as well.

Most of the items seem reasonable, but the price tag on others seems really high, and I don't know the parish well enough to know if they can raise this kind of money.

It has been well developed.

Anyone entering the church can easily see that the physical plant is in desperate need of repair. Boards are rotten, paint is flaking and peeling, the interior needs refreshing with paint and carpeting. Those are just the visible signs. If we don't take action soon, the costs are only going to increase and we'll be in an emergency situation rather than a need-to situation.

Individuals, like myself, are struggling daily just to support ourselves and homes and do not have additional funds for anything out of the ordinary. My ability to support this financial project is very limited.

We need to fix the structural damage before we cause more and it costs more money.

The entire scope of it seems out of reach, considering the size and demographics of the congregation.

We consider the maintenance of the church as a primary responsibility of all parishioners, not the most active families only. The capital campaign seems to be the best way of reaching the entire parish membership.

Parishioners continue to be financially responsible.

I believe the campaign is too aggressive. Instead, I would rather see a manageable and attainable project list of what is most needed. We are a small church and I think the goal is far more than could be expected.

We are not adequately caring for our building and being stewards of what is entrusted to us. Repair expenses will continue to grow as the deterioration increases. Our current giving does not support these much needed repairs.

Any physical property needs to have a fund from which to draw from for upkeep and improvements.

It is important to update Trinity's facilities to encourage new membership and maintain existing membership.

Many who pledge do not keep their pledge. The last time we had to extend way beyond the three years to help cover those who do not pay.

We should take pride in our house of worship and be proud of the way it appears to those outside our congregation. It should represent the passion of our congregation and serve as a beacon to others.

I am stunned at the price tags on several individual items. Are the work estimates on the high side in case they missed something?

These projects that are desperately needed cannot be funded through annual pledges or by doing these projects ourselves.

5. Please indicate the level of priority you would assign to each of the projects outlined in the proposed plans by checking the appropriate line under each heading. The list below is in the same order that each project appears in the accompanying case statement.

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

	PRIORITY				Lack Informatio n
	High	Medium	Low	Opposed	
<i>Foundational Items:</i>					
1. Maintenance Fund	<u>59</u>	<u>26</u>	<u>4</u>	<u>1</u>	<u>2</u>
2. Exterior All Sections	<u>74</u>	<u>14</u>	<u>1</u>	<u>0</u>	<u>1</u>
3. Sanctuary and Narthex Interior	<u>62</u>	<u>22</u>	<u>4</u>	<u>0</u>	<u>2</u>

4. Carpeting	<u>46</u>	<u>30</u>	<u>11</u>	<u>3</u>	<u>1</u>
5. Furnace	<u>65</u>	<u>19</u>	<u>4</u>	<u>1</u>	<u>4</u>
6. Bell Tower	<u>42</u>	<u>25</u>	<u>19</u>	<u>1</u>	<u>3</u>
7. Narthex (lift/elevator)	<u>33</u>	<u>33</u>	<u>17</u>	<u>3</u>	<u>4</u>
8. Nursery School and Kitchen	<u>25</u>	<u>36</u>	<u>23</u>	<u>5</u>	<u>1</u>
9. Phone System	<u>22</u>	<u>37</u>	<u>24</u>	<u>4</u>	<u>3</u>
<i>Core Items:</i>					
10. Computer Network	<u>28</u>	<u>30</u>	<u>23</u>	<u>4</u>	<u>5</u>
11. Replace Stairs and Deck to Classroom Area	<u>28</u>	<u>34</u>	<u>21</u>	<u>3</u>	<u>3</u>
12. Restrooms	<u>15</u>	<u>38</u>	<u>30</u>	<u>3</u>	<u>2</u>
13. Parking Lot	<u>25</u>	<u>31</u>	<u>27</u>	<u>5</u>	<u>1</u>
14. Sacristy	<u>23</u>	<u>43</u>	<u>18</u>	<u>1</u>	<u>5</u>
15. Windows	<u>23</u>	<u>44</u>	<u>19</u>	<u>2</u>	<u>2</u>
<i>Reach Items:</i>					
16. Parish Hall and Classrooms	<u>7</u>	<u>36</u>	<u>35</u>	<u>8</u>	<u>3</u>
17. Security System	<u>21</u>	<u>32</u>	<u>31</u>	<u>4</u>	<u>2</u>
18. Church Sign	<u>16</u>	<u>20</u>	<u>45</u>	<u>8</u>	<u>1</u>
19. Stairway to Community Center Parking Lot	<u>5</u>	<u>19</u>	<u>37</u>	<u>26</u>	<u>5</u>

Comments:

Maintenance should be a line item in the annual budget, not a restricted fund. (2)

These prices seem very steep. Some of these things are too expensive and can be done for less with moderate improvements or changes.

Security of the building is a priority; vandalism in a church is very dangerous.

Maintenance for the roof? Where is that?

The building isn't really level, as it's settling with age. Putting a carpet over a warped floor won't help.

Focus on safety.

I don't believe the covered stairway is a good use of church funds. You do need more parking, but for the elderly that stairway would not be an option and for the younger people probably not a preference.

What I think would be prudent at this time is to repair and replace things that are safety or insurance issues. Interior painting of the offices, classrooms, parish hall etc. can be done by congregation and cost less. The lift we have now is working and although it can be temperamental it meets our needs.

Also, and you may already know this, but at the time of the 1990 addition and renovations, in the corner of the building where the lift is placed there were problems of hitting stone and when removed flooding in the Parish Hall. If you decide to do work on or replace this lift you should be aware of this area.

I would also like to make a strong case for siding rather than painting the exterior of our buildings. I know it is more expensive but would eliminate an expensive and on-going maintenance cost. I also know that people oppose this for aesthetic reasons but the advancement in new materials and presentations has truly made it look like wood. This I believe would also solve our lead abatement problems freeing us from that ongoing expense. As a compromise perhaps only the actual sanctuary building could be painted.

Why are we looking into a security system? Have there been robberies or break-ins of which I am unaware? Right now this seems unnecessary.

I admit to being quite confused about the work suggested for our bathrooms. I realize that the two behind the kitchen are old however all the bathrooms except the one in the downstairs back hall have windows. Is that no longer considered sufficient ventilation?

I am a bit concerned about the replacing of the steps into the classroom area, only because we have had so much trouble with the wooden steps that are there. Maybe we might consider something like stain versus paint? Or concrete? Or even open metal? I am not a designer nor do I know all the possible ways to look at the problem, I would just encourage that we explore more than one option.

For item #18, an esthetic but feasible proposal and drawing has already been submitted to the vestry which is WAY lower than the presented estimate of this campaign and would be helping the needy designer to boot.

Many of the things we opposed have been redone recently and there is nothing wrong with them.

It only makes sense to repair, replace, and upgrade since it not only makes the space more liveable and safer, but also prevents the need for future repairs. In the long run it will prove to be cost effective to take care of what needs attention now.

I feel exterior building should be completely repaired and sided to avoid future maintenance. Carpet is not needed; wood or tiled floors kept clean and waxed should be fine.

Does the lift really need replacing?

Stairs have rarely been used.

Cost estimate is too high for carpeting.

Emergency exit is a priority for the sacristy, but why \$33,000 when the classroom stair exit is only \$7,000?

The stairway would benefit both trinity and the town. Would the town share the cost? Very rarely has parking been an issue. It is too expensive! One-sixth of the entire campaign! Luxury is not needed.

I don't consider the nursery school and kitchen to be "foundational". I think that is way too high of a number for what really needs to be done. Some of it can be done at a later date. While air conditioning may be nice, I don't see it as something that is really needed. First of all, it is a basement and basements are cool. Nursery school is not in session in the summer when it is hottest. When that space is used during church services, it is in the morning when it is the coolest.

I don't understand the sacristy emergency door expense.

Considering that the nursery school uses the kitchen, I think upgrading it should be a joint effort.

6. The ultimate goal of the capital campaign would be to successfully raise the \$768,030 estimated cost to cover all of the outlined projects. If the proposed total goal of \$768,030 cannot be fully funded by a capital campaign, how would you feel if Trinity Episcopal Church were to assume prudent long-term debt to ensure completion of these proposed plans?

 12 Acceptable 50 Undesirable, but acceptable 24 Unacceptable

More than half (58%) responded that it is undesirable, but acceptable to assume long-term debt; another 28% said it is unacceptable. Only 14% responded that long-term debt would be acceptable.

Comments:

If you run short for essential items, such as items 1-9, and you had good contracts and estimates already in place, then yes.

We did that once already; it was not a good idea.

Depending on how this works out, it may make sense to acquire the rest of the money through financing. And, if we are more appealing to newcomers (via working on the exterior) we could do better financially overall.

Depends on how much debt; over \$200,000 would be too much debt.

If the church takes on debt for the projects, I doubt I'd contribute.

It depends. Some repairs are urgent and so long-term debt would not be unacceptable. However, if the long-term debt affected the parish negatively (in terms of mood and function), it would not be wise.

Long-term debt is not a solution for a church that cannot cover its operating budget each year. (4)

If we are going to build momentum we need to get things done, so debt may be acceptable for important projects. (3)

Need to see the financials and the ability to service the debt.

It is critical, at this juncture, to stay completely within the means of the church community.

We have done this before and it worked out well. Just be sure this is the best way to go.

Depends totally on the size of debt.

Do not believe we should assume debt to cover projects in the "reach" category. (3)

This may be necessary because of the average age of parishioners and their ability to give in a sustained way to a project like this. (2)

For some of the proposed items, but not all. (3)

Would rather skinny down this list into more manageable project groupings, complete a smaller subset, then go back to the parish to raise additional funds for other work. (2)

All of these projects are too much to do all at one time.

The estimates seem too high on some items. Were these estimated put out to bid?

If you can't afford it, don't buy it. (2)

Take advantage of low rates for priority improvements only.

I question the ability to repay debt.

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

Comments:

We are an incredibly welcoming church.

We're a very viable community. Underneath our Episcopalian exteriors, we are deeply caring. That feeling of home is apparent when you join us.

The Sunday school has improved greatly over time.

People are enthusiastic, especially folks who haven't already lived through the first two campaigns.

We have a very strong church family. Many members are deeply devoted and dedicated. (11)

We had success with campaigns in the past.

Linda does a wonderful job. (4)

The leadership of the church is good. (3)

Generous members who care deeply about Trinity. (8)

This has been done in a very open and honest manner. (5)

Our commitment to outreach and community is excellent. (7)

The framework and discernment was very thoroughly done. (2)

Starting this project will create great energy in the parish. (3)

The recent closing of another church has brought home the reality of needing to preserve our church home.

The people of Trinity can and will step up if asked. (7)

There is a can-do attitude about this church. (2)

This is a strong Christian community with above average household incomes.

Trinity has a stable congregation with necessary resources. The church is in a position to grow. (2)

Most members and attendees love the church and want it to be here for the future. (4)

A committed and loyal congregation that is dedicated to Trinity. (9)

Church members seem to be in favor of obtaining funds for needed maintenance. (2)

Trinity is a giving member of the community and is a historical focal point. (4)

Repairs are must do's, not wish list items.

Parishioners are aware that we have put this off as long as we can. (3)

This is a stable community.

Contractors need work and may be willing to do this for a good price.

The history of our beautiful architectural structure.

The facility is home to a preschool, Canton Food Bank, Canton Connections, and many social needs.

The strong faith and belief of parishioners.

8. What problems, if any, do you foresee for this proposed capital campaign?

Comments:

This project appears too daunting.

Newcomers may not admit that they can't afford to come to our church because we are in the midst of an expensive capital campaign.

People need to demonstrate the right commitment to the church and realize that this campaign is a stretch and they need to give in a meaningful way to make sure the church continues. (2)

Most people are of moderate means. (2)

We are a small group. (6)

People who come to the table with their own agendas. (4)

Not understanding the financial limitations. (2)

The ultimate cost! (4)

Tough economic times. (10)

It is a lot of money for our parishioners to come up with.

We have a track record of a lack of overall giving. (2)

Communicating and convincing the congregation of the necessity of the campaign. (4)

Raising the money. (9)

Trinity is a very outreach oriented parish (it is better to give than to receive). We need to refocus some of the energy inward (take care of our home so that we can take care of others). (2)

Negativity due to the last campaign.

Resistance to individual items.

I think it will be difficult to assure that people, once pledged to this plan of giving, sustain their interest and efforts. With annual pledges this is a problem; with a three-year plan it will also be a concern. (6)

People may leave to avoid giving more money (financial pressure). (3)

The increasing average age of the congregation means more members on fixed incomes.

An overall decrease in membership/attendance and a lack of dedication of younger members (many who attend sporadically). (3)

Overreaching and unnecessary “dream” list.

There is a danger of accruing another long-term debt.

Will the level of giving support our needs? There is fear and a lack of confidence in our ability to do this.

Costs need to be kept under control. There is no room for cost overruns. (2)

I don't see a net-growth in the parish.

9. What added ideas or suggestions do you have which might be helpful to the leadership in making the important decision to move forward with the capital campaign?

Comments:

Continue to have informative meetings. (3)

Perhaps we could spend more money on our own campaign, or maintenance, instead of outreach. (2)

Go to contractors and remind them that we're non-profit and they could write off some of the expenses; that might lower our costs.

Some of the things I was interested to see done last time in terms of maintenance were trimmed to save costs. Please be more conscientious in completing these projects, for the benefit of future parishioners.

Emphasize our need for pledges to be fulfilled in a timely manner. This needs to be taken seriously.

We love that the young families are involved in this process, please keep that up.

There are people in the church who will give, anonymously, for various needs and that may be a way to encourage giving. Tap those givers who want to help, quietly, to get things ACCOMPLISHED.

Is it possible to investigate moving to another existing abandoned church in the area? Is there a way to maximize the diocese' assets in the area so that we are able (as an entire Episcopalian community) to focus on our mission instead of preserving our buildings?

It would be helpful if the campaign leaders could be more transparent about data. For example, the time lag between discernment and the results of the first questionnaire was long. Communication is key to this things success. Let us know more, more often.

Leadership will be key. A charismatic leader who energizes the church and helps them feel motivated and welcome is essential.

We have a history of asking for money for special things and we might be better off extending the pledge period to four or five years to avoid nagging.

I would like to see more visual/pictorial detail. (2)

Break the costs down in more detail.

Remind people of what their houses would look like if they didn't do the same maintenance that we are asking them to do here.

Do we have any soft commitments on the capital raise? Are there any sources outside the parish membership that can help?

Communicate each step of the process. (3)

Paint a picture of what Trinity will look like in the future and how the needed changes will help advance our mission to serve Christ. Right now it sounds like we have neglected the building and it's time to pay the price. It is true I guess but hard to get motivated and inspired about it.

Be absolutely certain that whatever dollar amount is established for a goal is realistic and achievable. It is very important that the campaign be a positive, successful experience for the church community.

If you have to choose between projects, think about choosing ones that will save us money in the future. Like a new, efficient, furnace and windows; savings on heating could be used in other ways in the future.

I would strongly recommend that, in concert with our priest, a group be formed to look very seriously at the future of the Church, capital "C", and Trinity in particular. There may be ways, if we are able to move beyond basic deferred maintenance, that some new ideas might be incorporated. I believe that change or die is a given and although it may sound strange coming from an Episcopalian...I chose change!

Include sustainability in the plans.

You need to take advantage of existing talent within our congregation, not to replace professional contractors but to assist and supplement to lower costs. What a beautiful thing if we came in below budget and had money left to go for the "Reach" list.

Over the years I have heard complaints about all of the campaigns that run throughout the year that ask people to consider giving financial support to one cause or another. At times it is possible to feel bombarded. In the event that this campaign goes forward it might also make some sense for parish leadership to give some thought to how "other fundraising" needs to be managed during the three years of the campaign. Does it make any sense to have a moratorium on other fundraising during this time, apart from annual pledging? Is there some way to at least "dial down the noise level" while we focus on this important goal?

Many parishioners are tapped out financially. Only count on the monies that have been committed. Please do not put us back into debt like after the last reconstruction. We can't carry it.

Are there members of the congregation that have skills/training that could help complete any of the projects listed or contribute to an effort (volunteer to be extra hands, heads, hearts, etc.)? I'm sure many of us would pick up a paint brush if asked. We should learn who in our midst can support/complete these efforts for free or at a reduced rate before we solicit bids from outside parties.

Some of these items should have been done over the years, especially interior painting. Something being done yearly rather than leaving our beautiful building in the run-down shape it is in is most disturbing.

The scope of the project seems to require a professional project manager.

Please take a look at costs. Some estimates look high. (3)

Have the discipline to prevent “scope creep”.

Shop for prices.

When I look at the Trinity family, I wonder about how much talent we have out there to do some of these things “in house”. We will need a lot of different contractors to do all of these items and I wonder how many of us can do these things ourselves. I wonder how many of us might either by contractors or have connections with contractors to do this work.

It would be helpful to know which projects must be done together or in conjunction.

Reduce the scope to priority items only.

Improving Trinity will encourage new membership and result in recovering financial burden through new gifts.

The whole thing is overwhelming!

Get parishioners involved in fundraising so that if they can’t contribute as much as their devotion would want them too, they can contribute in spirit, sweat and tears.

Stop trying to get large financial decisions and commitments out of the youth.

Rally the troops! The key to success will be to get everyone to accept that these improvements must be done and that it is our duty to answer the call.

Plan for having a cash reserve account.

Pursue possible low-interest loans from the diocese.

Could grants be investigated because of the historical value?

Leadership

10. If asked, would you be willing to attend a discussion to learn more about working on a committee in support of the proposed capital campaign?

28 Yes 29 No 33 Not sure at this time

Thirty-one percent would be willing at this early date to attend a discussion to learn about volunteering. Another 37% 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 non-vestry individuals you know, who would make an ideal chair for this proposed capital campaign?

Paul Atkins	13
John Almore	
Russ Asklof	2
Leslie Deehy	3
Peter Deehy	2
Janet Downey	
Bill Emo	
Steve Gorman	9
Christine Green	
Jack Henne	
Betty Holmes	
Ken Jones	
Walt Lowell	2
Ray McAdoo	2
Mimi McGill	4
Joe Menguel	
Anne Marie Pelletier	
Rick Richardson	2
Patrick Sparks	
Jim Stapleton	
Tom Sweeney	
Mike Wallace	4
Jeffrey Wilbraham	

A young person or family.

Someone with professional project management experience who has the time to devote to this project.

Campaign Timing

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

57 Yes 7 No 27 No strong feeling

Sixty-three percent are in favor of the proposed timing. Thirty percent expressed no strong feeling one way or another. The remaining 7% were opposed to the campaign timing. This is an endorsement that a campaign could proceed as scheduled.

Gift Potential

13. Do you think a goal of \$768,030 (as outlined in the proposed plans) can be raised in gifts and pledges?

12 Yes 35 No 44 Don't Know

Only 13% believe the goal can be attained, while the majority, 48%, have no opinion if it can be reached. Another 39% 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.

If no, what percentage of the total do you think can be raised?

2%

10%

10% to 20%

25%

25% to 30%

\$25% to 50%

30%

33%

50% (6)

70%

75%

80% to 85%

85%

One-third

\$300,000 (2)

\$450,000

\$500,000 (5)

\$550,000

14. If convinced of the need, would you be willing to contribute to this proposed campaign? Please keep in mind this contribution would be above and beyond your annual pledge or stewardship. (All gifts, regardless of size, are needed and are important to the success of the proposed campaign.)

72 Yes 6 No 13 Not sure at this time

Seventy-nine percent would be willing at this early date to contribute to the campaign, while another 14% expressed that they are not sure at this time. Only 7% indicated a negative response. This is a positive and an indication that the campaign can proceed.

15. If "yes," please estimate your household's possible giving in total over the course of a three year period. *This is not a pledge or in any way binding.*

<u>11</u> \$500 or less	<u>8</u> \$500 to \$1,000
<u>27</u> \$1,000 to \$3,000	<u>10</u> \$3,000 to \$5,000
<u>10</u> \$5,000 to \$10,000	<u>4</u> \$10,000 to \$25,000
<u>2</u> \$25,000 to \$50,000	<u>0</u> \$50,000 to \$75,000
<u>0</u> \$75,000 to \$100,000	<u>0</u> \$100,000 to \$140,000
<u>0</u> \$140,000 and above	

Respondents projected donations ranging from a low of approximately \$220,500 and a high of approximately \$444,500. While not indicated in the chart above, some amounts were not given in ranges, but rather in single amounts. For example, instead of \$3,000 to \$5,000, a gift of \$5,000 may have been indicated. The high and low estimates have been adjusted accordingly. These early estimates do not support a primary goal of \$768,030.

Experience tells us we can take the average between the low estimate (\$220,500) and the high estimate (\$444,500) of the pre-campaign projections revealed in the study and multiply by a factor of 1.2 when certain percentages and comments (such as revealed in this study) are attained. Thus the average, \$332,500, when multiplied by this factor (1.2) reveals a suggested goal in the range of \$400,000. This recommendation is made factoring in the reality that additional gifts, not yet identified, will be forthcoming; hence the multiple of 1.2.

Planned Giving

16. In addition to making a gift to the proposed capital campaign, some parishioners may be thinking longer term about supporting Trinity Episcopal Church. This type of support could be in terms of a planned or legacy gift such as:

- A bequest in your will
- Creating a charitable gift annuity with term benefits (e.g. income, tax) while also ensuring a legacy benefit in your name to help secure Trinity's future (minimum gift of \$5,000)
- Creating a charitable remainder trust with appreciated assets (minimum gift of \$100,000)
- Creating a pooled income fund gift for life (minimum gift of \$2,500)
- Donating appreciated real property such as a house, vacation home, farm or business

Information about each of these types of planned or legacy gifts is available in the Narthex or can be mailed to you by requesting the information through Trinity's main office at (860) 693-8172.

At this time, have you considered making a planned or legacy gift to Trinity Episcopal Church?

 66 No, I have not

 13 Yes, I have considered this type of gift

1 I have already taken action on one of the above types of gifts

 9 Trinity Episcopal Church is already in my will or estate plans.

A number of respondents indicated an interest in planned giving. Nine have already included the church in their estate plans. Others welcome information; they should receive information on planned giving. Endowment building should be pursued regardless of whether or not there is a campaign immediately. The Episcopal Church Foundation can respond to these personal queries on behalf of the parish.

Recommendations

Recommendation #1

The information revealed in this study suggests that a capital campaign for a Primary Goal of \$400,000 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 this firm would be followed.

Consideration may also be given to embracing a Challenge Goal, higher than this recommended Primary Goal. Persons could be encouraged to pledge for five years for example.

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.

A Final Word

The Episcopal Church Foundation thanks the leadership of Trinity 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.

Tentative Case Statement