



**M&M INTERNATIONAL INC**  
*BRINGING MISSION TO LIFE*

# PLANNING FEASIBILITY STUDY FINAL REPORT

Holy Family Parish, Whitby ON



M&M INTERNATIONAL INC  
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August 23, 2022

## INTRODUCTION

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We are pleased to present this Planning Feasibility Study Final Report to Holy Family Parish outlining the details of **M & M International's** findings and recommendations for the proposed \$3,650,000 financial campaign. The purpose of the study was to assess the ability of the parish to raise this amount in a financial campaign over a 5-year period. Through a series of personal face-to-face meetings and open forum sessions **M & M International** set out to gauge the ability of the parish community to provide these funds.

This report follows a clear path, setting the stage for the study findings. First, we illustrate the **study process**, highlighting and identifying the key components critical to the process. The second section is an **in-depth analysis** of the findings and observations. Lastly, we present our **recommendations** for consideration by the parish prior to launching a fundraising campaign. Our Planning Study focused on these **key objectives**:

1. To define and assess the various strengths and weaknesses of Holy Family Parish and its Case for Support as it relates to a possible fundraising campaign.
2. To assess the importance of the proposed Case for Support with parishioners of Holy Family Parish.
3. To gauge the potential for crucial financial contributions from select individuals and congregation members that would be critical to the campaign's success.
4. To identify possible campaign leaders, including chairperson and committee volunteers.
5. To determine the most appropriate timing for a campaign.
6. To determine if the identified \$3,650,000 goal is realistic and attainable.

At **M & M International**, we are conscious of our responsibility in presenting this report and recommendations. It is our goal to be concise in our statements and to present a report of substantial value to Holy Family Parish's leadership in developing its fundraising plans and objectives.

This report represents **M & M International's** professional judgment. Our experience provides the basis for our assessment of the advice and counsel solicited from the Study participants. Our study research is exploratory, providing findings that are primarily attitudinal in nature. Accordingly, **M & M International** has attempted to illuminate the statistical findings with narrative explanations and insights.

We have enjoyed the opportunity to participate in the development of the fundraising plans for Holy Family Parish. We would like to acknowledge the efforts and assistance provided by the Study Committee. Most importantly, we wish to thank the individuals who gave freely of their time to assist the parish and **M & M International** with this study. We look forward to being of service in the future.

Yours in Christian Service,



Martha Asselin  
Partner Consultant



Sarah McCarthy  
Senior Consultant

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## EXECUTIVE SUMMARY

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### *Overview*

In general, participants are very supportive of and **feel** connected to Holy Family Parish. The parish community is considered friendly, vibrant and welcoming. Participants in the Study most frequently identified the following three strengths of the parish:

- 1) Fr. Laszlo, the priests and lay leadership
- 2) Community vibrancy and welcome
- 3) Parish's focus on ministries, faith formation and activities

Parish areas mentioned as possible areas to improve included:

- 1) Space limitations for programs and group meetings
- 2) The need for engagement of young families and new volunteers
- 3) Lack of accessibility.

Generally, respondents strongly support both phases of the Master Plan Priorities of the Case for Support, with some minor considerations around the landscaping, lighting and acoustics elements of the plan. Some people expressed reservations about high costs and the difficult economic situation with unemployment and higher cost of living. Overall, however, there is positive endorsement of the Master Plan.

### *The Case for Support*

Broadly, **almost all the case elements** of both phases are fundable. Based on respondents' feedback, the less strongly supported areas are the Landscaping, Church Acoustics and Lighting Improvements. Also, there are questions about the need for, and the cost of, the atrium in some people's minds.

More communication about and buy-in are needed from people who didn't see the need for the atrium space.

Many people are also unaware of the uses of the parish offices. Additional clarity/details would assist people in understanding these requirements.

There is also strong support for the future plans. Most people felt we could defer some repairs and updates for a time; however, **the elevator, accessibility and kitchen renovations stand out** as projects that people believe require action more quickly.

### *Leadership and Volunteerism*

Most respondents named parishioners they believed capable of leading a campaign or being a campaign chair. Approximately **65 names were identified as potential campaign leaders**.

Many people would also consider volunteering for a committee or visiting fellow parishioners in a fundraising effort. This is a **strong response**, indicating that **Holy Family would have the required leadership to embark on a campaign**.

## ***Goal Attainability and Financial Support***

When asked if the parish had the capacity to raise \$3.65M, sixty-one percent (61%) of participants said *yes* and thirty-six percent (36%) were *uncertain* with one person not responding. In general, respondents were concerned that many people have lost jobs and that the increased cost of living may have an impact. There was overall acknowledgement that Holy Family is a generous parish.

Of the eighty (80) participants or couples interviewed, sixty-five (65) agreed to support the campaign financially. Eight (8) participants might contribute financially but did not provide a specific gift amount. Seven (7) would not or could not support the campaign financially.

The parishioners included in this report would contribute approximately **\$692,500 in gifts**. This amount represents a substantial **average gift size of \$10,654**.

A high proportion, **seventy-eight percent (78%) of participants, would make or would consider making a financial gift to a campaign** at Holy Family Church, and **seventy-five percent (75%)** of those who would contribute said they would **pledge for five years**.

Unfortunately, we did not identify gifts in a \$250K – \$1M range, **such as** would be required to reach a goal of \$3.65M. Based on the respondents' current support of the case and strong endorsement for a campaign, **M & M International's** opinion is that **a \$2.4M goal for the parish campaign is attainable with the understanding that Holy Family Parish follows the recommendations outlined in the Recommendation Section** herein. To attain this goal, M & M International requires the parish to minimize the use of the current Building Fund envelopes and direct attention and support to the campaign fully.

M & M International recommends that after the parish finalizes the costs and details of the full plan, a **quiet phased approach to approximately 4 – 8 donors capable of gifts of between \$250K to \$1.0M** would be undertaken to consider a potential higher goal amount.

## ***Giving Options and Guidance***

Participants support a campaign in the parish. However, only forty-eight percent (48%) of respondents considered this campaign a *high priority* within their philanthropic giving. Many are concerned about giving to other work or charities and about the financial uncertainty of today, post-COVID.

Only three percent (3%) of respondents indicated that they have left a gift to Holy Family in their will. However, sixty-six percent (66%) of respondents would **consider leaving a gift in their will**. This is a very good response and indicates that a program of information and bequest identifications would greatly benefit the parish.

Ninety-five percent (95%) of respondents also felt that parishioners should be able to choose to make **gifts in memory or in honour of someone**.

## ***Recommendations***

Overall, a campaign at Holy Family parish has broad support and the tentative approval of parishioners. There are many committed people who strongly support the plans and the overall Case for Support. There is good support to commence with the Key Priorities of The Master Plan. However, there is some concern over the phasing of some of the key priorities.

**It is the opinion of M&M International that the parish of Holy Family needs some preparation and further communication to ensure that the case that is most likely to be successful is presented to the parish before undertaking a campaign.**

Based on our experience and the results of the Study, we have listed below some of the opportunities we see, and concerns and recommendations that we would have before launching a fundraising campaign.

### **Recommendations:**

- 1. Finalize the Master Plan: priorities, timing, plans and costs**
  - a. Develop detailed costs for all phases that can be scrutinized by the parish.
  - b. Consider the idea that, at a minimum, accessibility and a renovated kitchen be included in the Key Priorities
  - c. Consider moving forward with all, or as many as feasible, high priority elements of the plan if a solid financial plan can be made. (Note that people who do not favor the atrium, may favor the kitchen, accessibility, and Msgr. Breen Hall updates.)
- 2. Develop a Communication Plan once Master Plan has been defined**
  - a. Communicate the benefits to the parish of the new atrium
    - i. Include pulpit testimonials of youth and other participants in programs that cannot find space and require rental sites
    - ii. Use people who are a part of these programs to communicate and to tell their story.
  - b. Provide more context on the usefulness of all of the planed elements so as to assist in campaigning once campaigning is undertaken.
  - c. Answer questions regarding the costs of plans: e.g. what is the cost of an Archdiocesan Loan? And of any other contributions?
  - d. Answer questions and engage the community by communication in person, through hard copy, electronically, online and using email.

### **3. Campaign Goal Recommendations:**

Most respondents felt tentative as to whether a \$3.65M goal can be achieved.

Based on the respondents' tentative support of the case and strong endorsement for a campaign, ***M & M International's*** opinion is that **a \$2.4M goal for the parish campaign is attainable with the understanding that Holy Family Parish follows the recommendations outlined in the Recommendation Section** herein. To attain this goal, M & M International requires the parish to minimize the use of the current Building Fund envelopes and direct attention and support to the campaign fully.

M & M International recommends that after the parish finalizes the costs and the elements of the full plan, a **quiet phase approaching approximately 4 to 8 donors capable of gifts of between \$250K to \$1.0M** be undertaken with a view to considering a higher goal than that stated above.

## STUDY OVERVIEW

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### *Method*

**M & M International** collaborated with the Planning Feasibility Study Steering Committee to compile a list of potential interviewees – parishioners from a broad cross-section of the parish, whose insight and support were deemed critical to the success of the proposed fundraising program. **M & M International** and the Planning Feasibility Study Committee developed a preliminary Case for Support to provide these participants with the necessary background information regarding parish plans.

The intention was to invite the proper proportion of interviewees, consistent with the overall demographics of the parish, so as to inform the parish with a variety of opinions. Individual invitation letters and the Case for Support were emailed to approximately 160 potential interviewees. Of those invited, **eighty (80) confidential interviews were conducted with one hundred and thirteen (113) respondents.**

Open Forum sessions were held after masses on the weekend of June 4—5. Between 75 and 100 people attended the sessions and 28 survey responses were received.

Interviewees were invited by email and phone to participate in face-to-face interviews with a staff member of **M & M International**. Interviews were conducted over a three-week period commencing June 1.

Participants in the Study were asked to comment on issues relating to a successful fundraising initiative, including:

- † Personal perceptions of the parish and their views of its strengths and weaknesses
- † Responses to the parish's building plans, including assessing building elements in accordance with the Case for Support
- † Personal giving intentions in a proposed campaign
- † Inclination to volunteer for a proposed campaign
- † Thoughts on available leadership and specific individuals who could lead a potential campaign
- † Suggestions to ensure a successful capital campaign
- † Opinions as to whether the parish should launch a capital campaign
- † Support for this initiative and opinions on how to ensure its success

Participants were also asked if they had considered a **gift in their will** and whether they would consider leaving a planned gift to the church. As well, they were asked if pre-authorized giving options would be welcomed.

Finally, the participants' input on these topics was recorded in a questionnaire and their comments were compiled in an online database post-interview. Their responses and opinions serve as the basis for the series of recommendations included in this report.

## M & M INTERNATIONAL TEAM

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The following members from **M&M International** managed this Study:

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Martha Asselin	Study Supervision
Partner Consultant	Review of Preliminary Case for Support Interim Report preparation Study interviews Analysis and development of recommendations Report review Open Forum facilitation
Sarah McCarthy	Study interviews
Senior Consultant	Preparation of Preliminary Case for Support Development of recommendations
Gila Samoe	Report analysis
Development Coordinator	

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We gratefully acknowledge the **Planning Feasibility Study Committee**: Vera Hugel, John Hugel, Fr. Nagy Laszlo, Alan Diapero, Norm Sawula, Mary Kay Boase, Nicolaas Mensink, Angie Baglieri, and Tess Bondoc in the parish office, for their guidance throughout the Study process.

## **THE STUDY: FACTORS FOR CAMPAIGN SUCCESS**

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Based on *M & M International's* extensive experience with parishes of all sizes, we have found that the following factors comprise the benchmarks for fundraising success:

### **A Positive Image**

Parishes that are viewed as working proactively in the community and providing active ministry in the spirit of Christ are more likely to succeed in a fundraising campaign. Professional and consistent communication, and clergy and lay leaders are critical to the positive image of a parish.

### **Committed Leadership**

Major fundraising initiatives in parishes need high-level volunteer leadership to succeed. In addition, many volunteers will be required to carry out all other crucial actions.

### **An Urgent and Compelling Case for Support**

Parishes seeking support must communicate the urgency of plans, find specific and appealing opportunities for people to participate, and align the mission and vision of the fundraising initiative to the overall goals of the parish.

### **An Attainable Goal**

It is crucial that a campaign's financial goal be perceived as realistic and attainable.

### **Overall Support**

Financial support for parish campaigns comes from major donors (who represent a small proportion of most parishes' membership) and all other parishioners. Parish campaigns, although certainly dependent upon major gifts, can only succeed with broad parishioner and community support.

### **Readiness to Conduct a Campaign**

Parishes that complete preliminary groundwork in advance, succeed more often during the campaign. Establishing priorities, cultivating volunteers, communicating the goals, and constantly advancing the vision and mission of the parish are mandatory for successful fundraising.

## KEY STUDY FINDINGS AND OBSERVATIONS

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(In relation to the Discussion Stimulant)

### *Image (Questions 1 – 3)*

The people whom we heard from are very supportive of and connected to Holy Family Parish. The parish community is considered friendly, vibrant, and welcoming. Participants most frequently identified the following three strengths of the parish: (1) Fr Laszlo, the priests and lay leadership, (2) the community vibrancy and friendliness, and (3) the parish's focus on ministries, faith formation and activities.

The parish community is seen as a strength because of their friendliness and support of each other. From small groups to youth programs, there is a wide availability of programs to support the discipleship of people. The clergy and lay leadership are considered strong and approachable, and many people we interviewed were actively involved in ministry. Fr Laszlo's leadership and creativity is recognized and appreciated by all. Most are grateful for the many programs and supports to deepen their faith. The following are some verbatim comments:

- Fr Laszlo, priests and lay leaders (75)
  - Strong leaders
  - Great priests
  - Fr Laszlo has made the parish what it is today.
  - Strong group of people that support his vision
- (Sense of) Community and welcoming (57)
  - Good culture; really good vibe
  - Inviting and welcoming
  - Alive with faith
  - Engaging parishioners
  - Welcoming to all
- Focus on ministries, faith formation and activities (40)
  - Study opportunities
  - Opportunities to serve
  - Summer camps
  - Various ministries and small groups

When asked about the parish's areas of possible improvement, people mentioned weaknesses of the parish in relation to space limitations for programs and group meetings, engagement of young families and new volunteers. Also, the need for accessibility, too much focus on money, need for a crying room and concerns for the low numbers of returning parishioners post-pandemic.

When asked about the parish's **areas of improvement**, parishioners responded with remarks in the following areas. (Numbers in parentheses indicate the number of times an item was mentioned.)

- Lack of space for ministry and programs (39)
  - Need space for children's programs
  - Too busy, with space limitations
  - Crowded masses

- Engagement of young families and new volunteers (17)
  - Not creating new leaders
  - Welcoming newcomers
  - Involving youth
  - Core group does everything
- Lack of accessibility (7)
  - Lack of access
  - Ramp too difficult
  - Elevator a must
- Child/family room (6)
- Too much focus on asking for money (5)
- Decline in attendance after COVID – is this still needed?
- What happens if Fr Laszlo leaves?
- Parking (3)
- Diversity – [reach out] to LGBT and indigenous community

### ***Case for Support***

Eighty-five percent (85%) of participants in the study were “aware” and ten percent (10%) were “somewhat aware” of the financial needs and the plans outlined in the Preliminary Case for Support.

Eighty-three percent (83%) of participants in the study were supportive or somewhat supportive of the Case for Support, based on the materials that were sent to them.

Ninety-nine percent (99%) of participants believed that other parishioners would or may support this campaign and only one percent (1%) thought other parishioners would not support a fundraising campaign based on the materials.

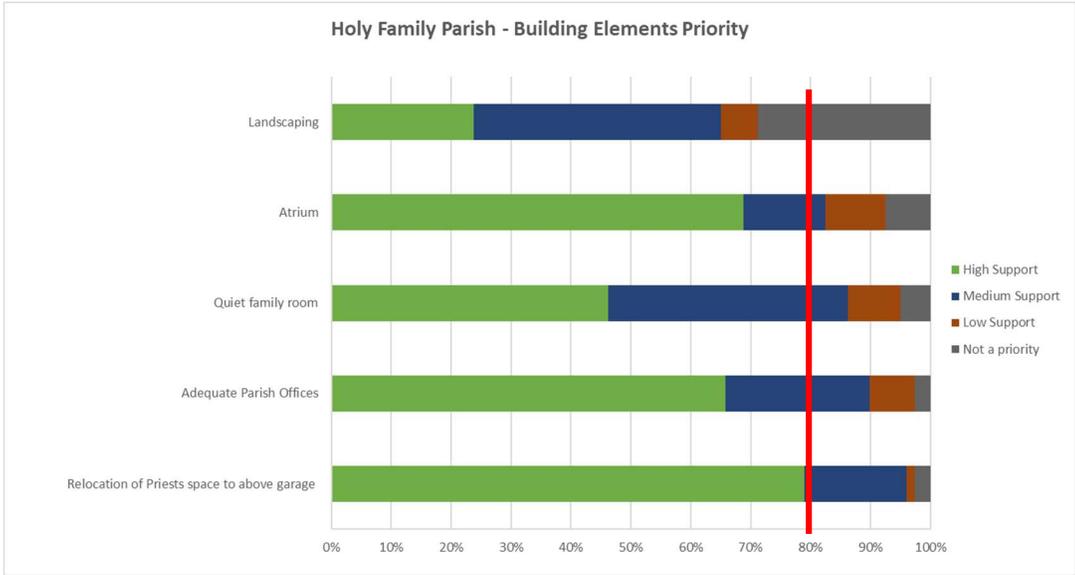
Forty-eight percent (48%) consider this campaign high within their philanthropic giving priorities.

**Q7: Please tell us whether the priorities outlined in the material provided are important or not to you.**

Based on the detailed plans, we asked participants to rank in priority the planned elements in Phase 1 and Future Phases. This allowed the participants to consider the priority they would give to each element of the plans, regardless of phase.

### ***Key Priorities of the Master Plan: Elements by Priority***

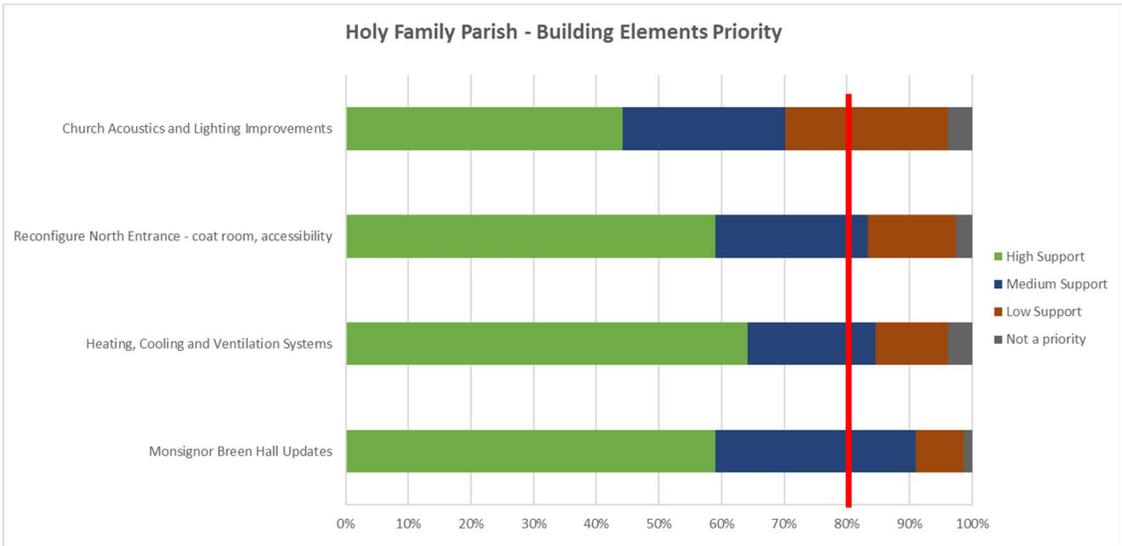
<b>Building Plans: Elements</b>	<b>High Support</b>	<b>Medium Support</b>	<b>Low Support</b>	<b>Not a priority</b>	<b>Med and High (excl no answer)</b>
Holy Family Plans					
Relocation of Priests space to above garage	79%	17%	1%	3%	<b>96%</b>
Adequate Parish Offices	66%	24%	8%	3%	<b>90%</b>
Quiet family room	46%	40%	9%	5%	<b>86%</b>
Atrium	69%	14%	10%	8%	<b>83%</b>
Landscaping	24%	41%	6%	29%	<b>65%</b>



(Note: ranked from lowest to highest support)

**Future Phase: Elements by Priority**

Future Phases					
Holy Family Plans	High Support	Medium Support	Low Support	Not a priority	Med and High (excl no answer)
Monsignor Breen Hall Updates	61%	33%	8%	1%	93%
Heating, Cooling and Ventilation Systems	66%	21%	12%	4%	87%
Reconfigure North Entrance - coat room, accessibility	61%	25%	14%	3%	86%
Church Acoustics and Lighting Improvements	45%	26%	26%	4%	71%



Listed above are elements of the plans. Respondents were asked to rate each element on a scale of high, medium, low priority or not a priority. **M&M International** recommends that a combined high and medium priority be over eighty percent (80%) to be fundable.

Broadly, **almost all the case elements** which are a part of both phases are fundable. The less supported areas are the Landscaping and the Church Acoustics and Lighting Improvements, based on respondents' feedback. There are questions also about the atrium in some people's minds. The respondents mentioned that people are not in favor of the high cost and suggest the atrium is **unnecessary**. More communication and buy-in is needed for people who do not see the need for this space. There is a tension between people who support the atrium and people who see it as too fancy and costly and who believe that the Msgr. Breen Hall can be updated and renovated to meet the current needs.

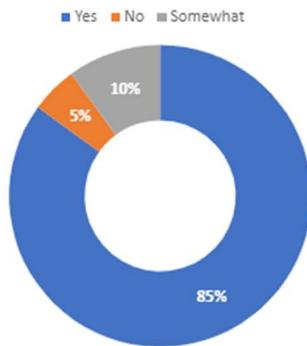
Many people are also unaware of the uses of the parish offices, so more clarity on details would assist people in understanding the need. Some people feel that sharing of the space is adequate.

There is ~~also~~ strong support for the future plans. Most people felt we could defer these repairs and updates for a time. However, the elevator, accessibility and renovations to the kitchen stand out as areas that people may want to move forward with more quickly.

There is a tension, mentioned by some respondents, that long-standing parishioners are not in favor of the new atrium. Many of these individuals may be interested in the hall updates and maintaining accessibility and the kitchen to a better standard. Not only increased communication, but also a broadening of the case to include some of these elements would meet their needs and also would provide a stronger campaign case for support.

## Quantitative Results

**Q7: Before this feasibility study, were you aware that Holy Family was planning to renovate the church building, creating a new atrium with furnishings, parish administration offices and landscaping?**

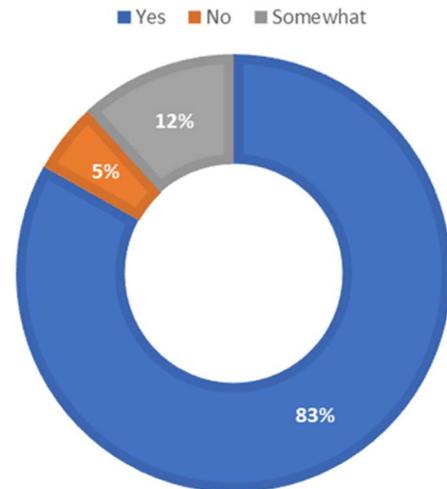


Answer	Count	Percent
Yes	68	85%
No	4	5%
Somewhat	8	10%
No Answer	0	0%
Total	80	100%

**Observations:** People are **generally very aware** of the overall plans to renovate the building.

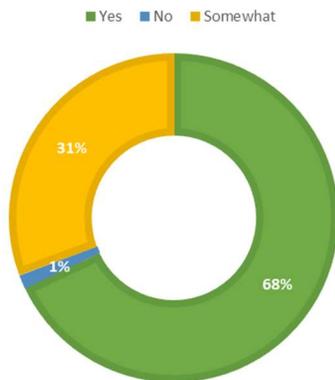
**Q8: Overall, are you in favour of the Master Plan priorities to renovate the church building: creating a new Atrium with furnishings, parish administration offices, and landscaping?**

Answer	Count	Percent
Yes	64	80%
No	4	5%
Somewhat	9	11%
No Answer	3	4%
<b>Total</b>	<b>80</b>	<b>100%</b>



**Observations:** Almost all people are in favor or somewhat in favor of the plans and felt it will make the building more welcoming. Most people agreed with renovation plans overall and the need for more space. Many were concerned with the overall cost. Also, people wondered if the atrium was extravagant.

**Q9: In your opinion, would fellow parishioners support this fundraising campaign based on the materials?**



Answer	Count	Percent
Yes	51	64%
No	1	1%
Somewhat	23	29%
No Answer	5	6%
<b>Total</b>	<b>80</b>	<b>100%</b>

**Observations:** There is a strong belief that people will or may support a fundraising campaign; however, some issues regarding support exist among the people who are less involved in active ministry and may also be of the older generation. Some may fail to see the need. Also, participants mentioned the financial issues facing people today.

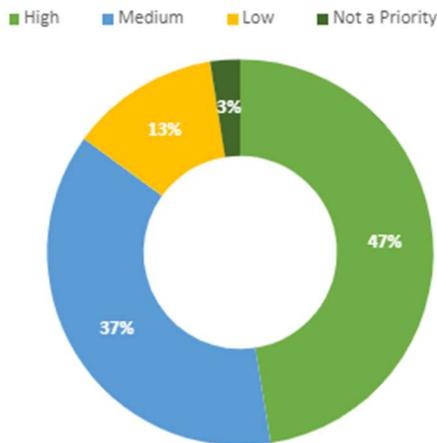
**Q11: Are there other needs that Holy Family should address in a fundraising campaign?**

Nineteen people recommended the following other elements be considered:

- Washrooms upstairs (11)
- Adoration Area (5)
- Choir space (5)
- More parking (7)

- Family Room (10)
- Storage (6)
- Chapel (3)
- More seating in church
- Midway aisle in church
- Accessible washrooms
- Re-install electric bells
- Breastfeeding room
- More staff to run programs
- Multiple screens in basement
- Clock in church
- Ministry to high school and other ages
- Drinking water fountain
- Community Hub for all groups in community
- Confessional improvements (2)
- Small room for religious article booth

**Q12: How would you rate this campaign within your own philanthropic giving priorities?**



Answer	Count	Percentage
High	38	48%
Medium	30	38%
Low	10	13%
Not a Priority	2	3%
Total	80	100%

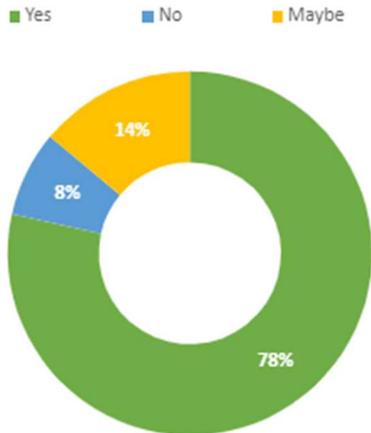
**Observations:** Forty-eight percent (48%) of respondents considered this campaign a *high priority* within their philanthropic giving. Some respondents had competing priorities. In our experience, **M & M International** would like

to see the *high priority ranking* for giving at ninety percent (90%) or above. Many participants spoke about the urgent need for renovations and others about competing charities and needing to provide family financial support.

***Leadership and Volunteerism***

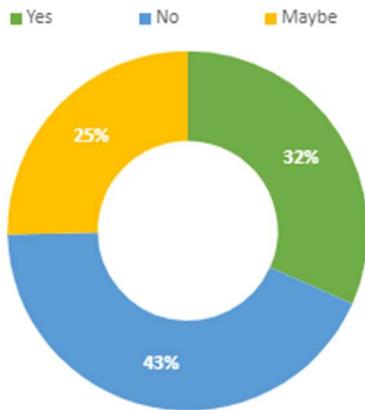
Almost all respondents were interested in naming parishioners they believed capable of leading a campaign or being a campaign chair. Over 65 names were identified as potential campaign leaders. Recommended leaders are provided in a confidential list and submitted to Fr Laszlo. This is a strong endorsement on possible campaign leadership.

**Q14: Would you personally serve on a committee to help organize and implement a campaign here at Holy Family Parish?**



Answer	Count	Percentage
Yes	26	33%
No	31	39%
Maybe	22	28%
No Answer	1	1%
<b>Total</b>	<b>80</b>	<b>100%</b>

**Q15: Willingness to visit parishioners in a fundraising situation.**



Answer	Count	Percentage
Yes	25	32%
No	34	43%
Maybe	20	25%
No Answer	1	1%
<b>Total</b>	<b>80</b>	<b>100%</b>

**Observations:** Forty-eight (48) parishioners who were interviewed, said “yes” or “maybe” to serving on a committee to organize or implement a campaign if it were launched today while thirty-one (31) would not. Also, forty-five respondents would consider visiting fellow parishioners in a fundraising situation. This is an overall **strong response** and Holy Family will have enough volunteers to embark on this campaign.

**Goal Attainability and Financial Support**

Of the eighty (80) participants or couples interviewed, sixty-five (65) agreed to support the campaign financially. Eight (8) participants might contribute financially, however did not provide a gift amount. Seven (7) would not or could not support the campaign, financially, at this time. Of the respondents who indicated support for a campaign:

1. Four (4) indicated a major gift of \$50,000 or more
2. Sixteen participants (16) indicated a major gift of \$10 – 50,000
3. The remainder would contribute less than \$10,000 **per donor** over the 5-year pledge period

The parishioners included in this report would contribute approximately **\$692,500 in gifts** estimating on the **low side** and **\$1,290,500 on the high side**. There is an **average gift size of \$10,654**. This is a very solid average gift size.

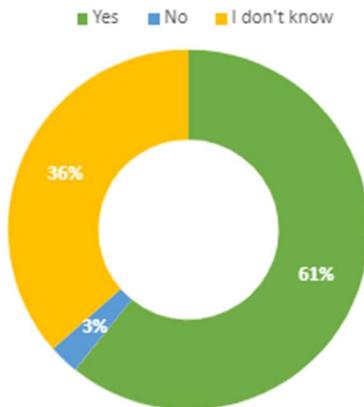
Gift Size (\$) Low	Gift Size (\$) High	Occurrences	Total Amount - Low	Total Amount - High
\$ 100,000	\$ 200,000	2	\$ 200,000	\$ 250,000
\$ 50,000	\$ 100,000	2	\$ 100,000	\$ 200,000
\$ 25,000	\$ 50,000	6	\$ 150,000	\$ 300,000
\$ 10,000	\$ 25,000	10	\$ 100,000	\$ 250,000
\$ 5,000	\$ 10,000	21	\$ 105,000	\$ 210,000
\$ 2,500	\$ 5,000	10	\$ 25,000	\$ 50,000
\$ 1,000	\$ 2,500	11	\$ 11,000	\$ 27,500
\$ 500	\$ 1,000	3	\$ 1,500	\$ 3,000
	Later Gift	8		
	No Gift	7		
<b>Total Study</b>		<b>80</b>	<b>\$ 692,500</b>	<b>\$ 1,290,500</b>
<b>Avg. Gift</b>			<b>\$ 10,654</b>	<b>\$ 19,854</b>

A high proportion, **seventy-eight percent (78%) of participants, would or would consider a financial gift to a campaign** at Holy Family Church, and seventy-five percent (75%) of those who would contribute said they would pledge for five years.

Unfortunately, we did not see the gifts of \$250K – \$1M that would be required to reach a goal of \$3.65M. Based on the respondents’ tentative support of the case and strong endorsement for a campaign, **M & M International’s** opinion is that **a \$2.4M goal for the parish campaign is attainable with the understanding that Holy Family Parish follows the recommendations outlined in the Recommendation Section** herein. To attain this goal, M & M International requires the parish to **minimize the use of the current Building Fund envelopes** and direct attention and support to the campaign fully.

M & M International recommends that after the parish finalizes the costs and attributes of the full plan, it consider embarking on a **quiet phase approaching approximately 4 to 8 donors capable of gifts of between \$250K to \$1.0M. Depending on the outcome of this quiet phase, a higher goal could be considered than that stated above.**

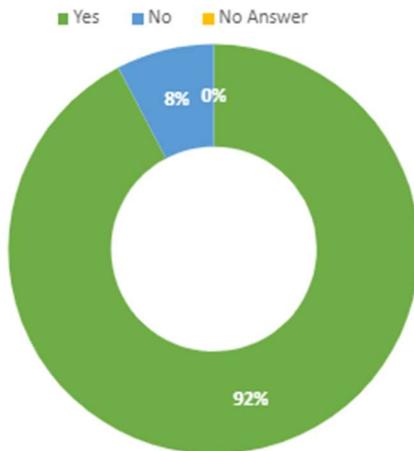
**Q22A. Do you believe that Holy family can raise \$3.65M in a fundraising campaign for these priorities of the Master Plan?**



Answer	Count	Percentage
Yes	45	61%
No	2	3%
I don't know	27	36%
No Answer	6	8%
<b>Total</b>	<b>80</b>	<b>100%</b>

**Observations:** When asked the above question, sixty-one percentage (61%) of participants responded “yes” and an additional thirty-six percent (36%) said they “do not know;” or are uncertain; three percent (3%) said “no”. Participants are cautiously optimistic about the \$3.65M goal. Many spoke of this being a generous parish with many who can support it financially. Others spoke about the current financial situation and reduced numbers in attendance due to COVID. Some respondents felt that a broad campaign that is inclusive would be required.

**Q25: In your opinion, should Holy Family Parish launch a fundraising campaign?**



Answer	Count	Percentage
Yes	72	90%
No	6	8%
Maybe/I don't know	2	3%
No Answer	0	0%
<b>Total</b>	<b>80</b>	<b>100%</b>

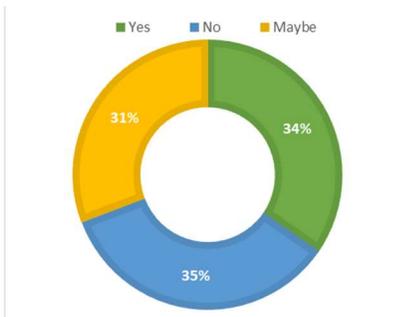
**Observations:** The vast majority of respondents, ninety (90%), believe **that the parish should launch a fundraising campaign**. Many participants felt that a campaign, is needed to meet the needs. People are cautiously optimistic and with regard to the financial situation facing people today and the numbers coming back to church post-COVID. Some mention we should optimize our current space before embarking on a campaign. Some questioned whether these are the final costs.

## Giving Options and Guidance

### Q 27: Have you left a gift to Holy Family Parish in your will?

	Count	Percentage
Yes	2	3%
No	75	94%
No Answer	3	4%
Total	80	100%

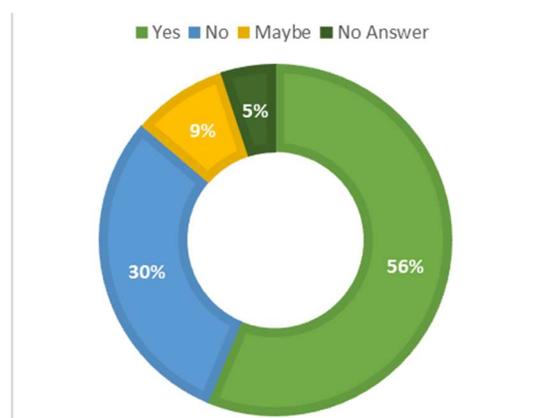
### Q28: Would you consider leaving a gift to Holy Family Parish in your Will?



Answer	Count	Percentage
Yes	27	34%
No	27	34%
Maybe	24	30%
No Answer	2	3%
Total	80	100%

**Observations:** When respondents were asked if **they had left a gift in their will to the parish**, only 3% have done so. However, when asked if they would **consider a gift to the parish in their Will**. Sixty-six percent (66%) of respondents said “yes” and “maybe” at this time. This is a very good response and an opportunity for Holy Family. It indicates that a program of information and bequest identifications would greatly benefit the parish in the future. It is important to remember that bequests are critical long-term gifts that will ensure that the ministry and building needs of the parish are met well into the future.

### Q28: Would you consider Pre-Authorized Giving for your campaign pledge?

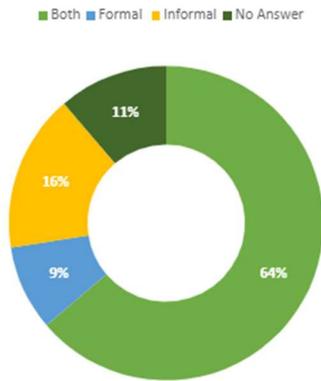


Answer	Count	Percentage
Yes	45	56%
No	24	30%
Maybe	7	9%
No Answer	4	5%
Total	80	100%

**Pre-Authorized Giving (PAG)** helps to ensure regular, predictable donations throughout the year and usually results in higher revenues. Sixty-five percent (65%) of respondents would or might consider using PAG for their campaign pledge. Only thirty percent (30%) would not. These figures indicate that

communication regarding PAG could increase its adoption among parishioners, especially for the campaign.

Q26B: IF "YES" WHAT KIND OF RECOGNITION WOULD BE APPROPRIATE? FORMAL = PLAQUES, NAME RECOGNITION, ETC OR INFORMAL = MASS SAID IN HONOUR OR A BOOK ETC.



**Recognition** Most of the respondents felt that parishioners should be able to make gifts in memory or in honour of someone if they so choose. Ninety-five percent (95%) of respondents said “yes”, a gift in memory would be acceptable within a campaign setting. Most respondents were impartial as to the type of recognition. Sixteen percent (16%) would prefer informal recognition, while nine percent (9%) said formal recognition would be appropriate. The majority of respondents, seventy-four percent (74%) thought both formal and informal recognition would be acceptable.

Respondents were asked what they thought were the **top major challenges** of launching a fundraising campaign would be. Respondents felt that engaging everyone in the congregation and the financial issues of today were the top areas. Also, some parishioners may not be supportive. When asked what they thought would be ways to ensure the success of the campaign, people highlighted communication, especially ways to show the benefit to the parish of the plans, as well as the vision for the future. They also recommended legacy giving, involving many people in the fundraising process, and using personal contacts as a means to engage. They also suggested that a diversity of groups be represented on the committee.

### Open Forum

Open Forums were conducted on June 4<sup>th</sup> and 5<sup>th</sup> after every mass. Between 75 and 100 people attended the sessions and 28 survey responses, 8 on-line and 20 hard copy, were received. This is a very good response.

The Open Forum responses mirrored the face-to-face interview responses regarding the plans and elements for support. We heard a few people request that the Archdiocese support for the church. There is also the concern about competing charities and the financial uncertainty today.

Twenty survey respondents provided a gift amount. There was one gift of \$100,000 and the remaining at \$10,000 and below. The total of gifts identified was \$167,500 with an average of \$8,375 per gift. This is very strong support and endorsement of the plans.

## SUMMARY OF INTERVIEWEE RESPONSES

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This is one of the most important sections of this Final Report, summarizing the many interviewee responses, questions, and discussions in a meaningful and comprehensible format. It is an opportunity for the interviewer to provide their insight into the responses. Like a Report Card, this section distills the interviewer's perceptions of the surveyed base's mentality into four **useful** sections.

### OVERALL ATTITUDE

Ninety-three percent (93%) of the respondents were *positive* or *neutral* about the Case for Support and the overall ability of the organization to undertake a successful capital campaign.

### LIKELIHOOD OF VOLUNTEER PARTICIPATION

Sixty-four percent (64%) of respondents were seen to be excellent or good candidates for volunteer roles. This **score indicates that Holy Family will be able to engage enough volunteers for a campaign.**

### LEADERSHIP POTENTIAL

Sixty-eight percent (68%) of the respondents were considered *outstanding* or *good* prospects for leadership roles in a campaign setting. This is an excellent result and indicates that along with the interest in participating, Holy family will be able to engage good leaders, which will assist in ensuring a successful campaign.

### PERSONAL GIFT

Ninety-five percent (95%) of the respondents would *probably* or *definitely* contribute financially to a campaign. This is **a strong participation rate of contribution**, although it is important to ensure an attainable goal is set and that all case elements are supported.

### APPRAISALS

The **M & M International** interviewer appraises the participants at the end of the interview. This provides some additional information about them. The first two items of data in the boxes below are combined to get the percentages on the right side of the diagram:



## RECOMMENDATIONS

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Overall, a campaign at Holy Family parish has broad support and the tentative approval of parishioners. There are many committed people who strongly support the plans and the overall Case for Support, there is good support for the overall plan commence with the Key Priorities of The Master Plan. However, there is some concern over the phasing of some of the key priorities.

In churches where we conduct studies, we tell leaders that 1/3 of all parishes will not proceed to campaign, 1/3 need to do some kind of preparatory work to get ready for a campaign, and 1/3 can go immediately to campaign.

**It is the opinion of *M&M International* that the parish of Holy Family needs some preparation and communication to ensure that the most successful case is presented to the parish before undertaking a campaign.**

Based on our experience and the results of the study, we include below some opportunities, concerns and actions that we suggest you attend to before launching a fundraising campaign.

### Recommendations:

1. **Finalize the Master Plan priorities, timing, plan details and costs**
  - a. Develop detailed costs that can be scrutinized by the parish – for all phases
  - b. Consider the idea that, at a minimum, accessibility and a renovated kitchen be included in the Key Priorities
  - c. Consider moving forward with all high-priority elements of the plan if a solid financial plan can be made. (Bear in mind that people who do not favor the atrium, may favor the kitchen, accessibility, and Msgr. Breen Hall updates.)
2. **Develop a Communication Plan once the Master Plan is defined**
  - a. Communicate the benefits to the parish of the new atrium
    - i. Include testimonials at the pulpit by youth and other participants in programs that cannot find space and require rental sites.
    - ii. Ask people who are part of programs that need better space to tell their story.
  - b. Provide more context on the usefulness of all of the elements of the plans. This will assist in campaigning once undertaken.
  - c. Answer questions regarding the costs of plans: e.g. What cost is an Archdiocesan Loan?
  - d. Answer other questions and engage the community with communication in person, with hard copy, electronically, online and through email.

### 3. Campaign Goal Recommendations:

Most respondents were tentative that a \$3.65M can be achieved.

Based on the respondents' tentative support of the case and strong endorsement for a campaign, ***M & M International's* opinion is that a \$2.4M goal for the parish campaign is attainable with the understanding that Holy Family Parish follows the recommendations outlined in the Recommendation Section** herein. To attain this goal, M & M International requires the parish to minimize the use of the current Building Fund envelopes and direct attention and support to the campaign fully.

M & M International recommends that after the parish finalizes the costs and attributes of the full plan, a **quiet phase approaching approximately 4 – 8 donors capable of gifts of between \$250K to \$1.0M** be undertaken, so as to consider a higher goal than stated above.

It is our opinion that an 'every-member-visit' campaign will benefit the parish by engaging parishioners less involved in the parish and at the lower end of the giving scale. A **five-year pledge period** will be necessary to reach your goal. Holy Family has run a few campaigns in the last 10 years. With current building funds at \$1.5M, people are very supportive of the parish. It is recommended that the parish consider **one campaign for the next ten years** to reduce burnout and meet the needs for the parish in the longer term.

**4. Planned Giving - Bequests:** There is a tremendous opportunity to increase parish revenue by implementing a formal bequest program to parishioners. This may be incorporated into the active phase of the campaign and will support the future work of mission and ministry of the parish.

M&M International believes that Holy Family is ready to launch a campaign after the above recommendations are evaluated, planned, and undertaken by leadership.

***Final Recommendations (initial steps):***

- † The parish takes the necessary time to discern this report
- † Sending thank you letters to study participants along with the Executive Summary of a copy of the Study.
- † Prepare a communication plan including these elements:
  - a. The results of the Planning/Feasibility Study
  - b. The parish's next steps

## **APPENDICES**

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Case for Support (via PDF attachment)

Discussion Stimulant (via PDF attachment)

Confidential Lists (Sent to Fr Laszlo Nagy)

1. Participants List
2. Participants who would consider being on a committee and volunteer visitor
3. List of possible committee members
4. List of possible major donors