

FEASIBILITY STUDY REPORT

FOR

THE UNION CHURCH

WABAN, MASSACHUSETTS

Conducted by

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PURPOSE OF THE FEASIBILITY STUDY

The purpose of the feasibility study was four-fold:

1. To determine the level of knowledge of and enthusiasm for the proposed projects and the proposed goal of \$700,000.
2. To identify leadership for the campaign.
3. To assess the ability of the congregation to raise the proposed goal of \$700,000 over a three-year pledge period.
4. To test the members' willingness to begin the campaign in Fall 2017 - Spring 2018.

The study was conducted from September 27 to October 1, 2017. **The study included 35 interviews of approximately 30 minutes each, with a total of 55 individuals being interviewed.**

OVERVIEW

First, we would like to thank you for the opportunity to serve as consultants for your feasibility study. We found your members to be open, honest, and very willing to talk about church strengths, challenges, and opportunities.

This was an extremely positive study, with members indicating strong support for both lay and pastoral leadership, for the projects proposed, and the sense of spirit and enthusiasm within the church was very strong.

The support for your ministers, Stacy Swain & Amy Feldman, the lay-leadership, and the programs of the church were very positive. Those interviewed thoughtfully provided an abundance of suggested names for leadership of a Capital Campaign.

The details are included in the remainder of this report.

IMAGE OF THE UNION CHURCH OF WABAN

During the interviews, people interviewed had a very positive image of the church.

Of those interviewed, 96 percent indicated the church meets **their** needs very well or fairly well. Meeting the needs of the **church family** very well, well, or fairly well was endorsed by 95 percent of respondents, while meeting the needs of the **people in the area** very well, well or fairly well was endorsed by 76 percent. **These ratings are all very high.**

Regarding the **wider community**, people provided positive responses about the work that The Union Congregational Church is doing in the community, although many people acknowledged that the immediate community of Waban didn't have very many needs, and the outreach efforts tended to refer to the greater community. Even with that begin the case, 24 examples of outreach activities supported by The Union Church were identified.

Church spirit also received **very high ratings** with 100% percent of participants responding excellent, above average, or very strong. Comments regarding spirit included: It's "warm, supportive...a happier place we want to go!" It's "a place where you can put the rest of your life in perspective." The "families are amazing!"

People were supportive of church leadership, with **lay leaders'** effectiveness realizing a 93 percent very effective/effective rating, 4 percent saying they are getting better or were greatly improved and other 4 percent thought there was a wide gamut of effectiveness and that the leadership was always trying to keep everyone happy. There were comments that the leadership is "all highly effective people," a "cohesive team," "always interested in hearing voices of newer people," and that they are all "worker bees!" **This rating of 93 percent is very strong, and a good indicator of positive leadership overall.**

Lay Leaders' ability to motivate people to give substantially received a rating of 93 percent in the "definitely/probably/possibly" ranges. This rating is on the high end of what we usually see in other churches, and is a compliment to those who have worked hard in stewardship and on the plans for providing a viable campaign project. Two percent said doubtfully and the others didn't know.

Stacy's effectiveness as your Minister was rated by 100 percent of participants as very effective or effective. This is actually only the second study that we've completed where there was a 100% rating in this category. We didn't hear a single negative comment. Overall, people are impressed with her "exceptional pastoral care" and her "tremendous preaching." She is "uplifting and inspiring," "intelligent and compassionate." Folks feel that she is just "fantastic," and is a "gift to the community."

Amy also received a 100% rating of effectiveness. This is really quite remarkable. It's clear that this team of pastors is doing something right here in Waban. There were also many positive comments regarding Amy. The church is "blessed to have her," and the two of them are "two peas in a pod!" Amy is looked upon as "very dedicated, dynamic, and there has been a major improvement with her in her current role." These ratings of your pastors are **a strong indicator of positive leadership.**

PROPOSED CAPITAL OBJECTIVES

Study participants were well **informed about the projects** included in the proposed campaign. A solid 58 percent said they were informed, and 22 percent said they were somewhat informed. These were good responses, although a little lower than what we have seen at other churches. We attribute this positive, yet modest result of the fact that a lot of the communication about the project list happened during the summer and quickly as everyone returned this Fall. There wasn't an abundance of time to thoroughly inform everyone.

Enthusiasm for the projects, or a strong support of the need for the projects, was indicated by 64 percent of the respondents. An additional 30 percent have mixed feelings. Sometimes, people confuse the question about how they feel about the project with the capability of the church to raise the funds, and comments in the "mixed feelings" category often come from those who focus on the total dollar goal. In this case, however, we think the mixed feelings were also attributed to the quantity of projects on the list. Only two people felt the list of projects was a little far reaching or overwhelming, which is a lower percentage than we've seen at other churches.

While quite a few (18) other projects were raised as potential additional needs, there was little repetitiveness to the responses to indicate that the feasibility study committee missed anything important to the congregation. The only idea that had commonality was a desire to be able to compensate the staff better and/or hire more staff (particularly Christian Education staff). This is something that would really need to be addressed through the annual budget, however, not through a capital campaign. A list of suggested additional projects can be found in the data report.

In the questions about **strong positive or negative feelings about any portion of the project list**, the **highest rated positive item was the roof** (36 out of 55 respondents equaling 65 percent). The elevator and front stairs came in next highest each being mentioned by about 30 percent of respondents.

There were not any significantly strong **negative feelings about any of the projects**. The landscaping out front was one item that wasn't very exciting, but was only mentioned by 11% of the respondents.

One of the reasons that it's recommended to propose a diverse list of projects during a capital campaign is so that there is something on the list for everyone to connect with. That has happened here. There was a positive response to the way the list of projects was broken into the three categories, "Stewarding our past," "Shepherding our Present," and "Strengthening our Future." However, there were a number of people who commented that they would very much like to see more specificity about the projects and costs in the "present," and "future" categories.

One of the things that we found very interesting is that there was general lack of any resistance to the mission component at The Union Church. That is out of the ordinary and speaks to the importance of mission to the life of this church. We tend to hear that mission projects don't belong in a capital campaign.

FUND RAISING POTENTIAL

Folks interviewed identified 24 potential leadership donors. Five of those named were not interviewed. **One hundred percent of those interviewed indicated their own willingness to participate financially.** Of those interviews, 7 indicated gifts in the top four giving ranges of the “Chart of Gifts Needed” (\$25,000-\$70,000+). There is a strong willingness to step up and give sacrificially to help make it a success. These are positive indicators of capability and success.

Generally, churches doubt their ability to raise capital funds and your results are a little more optimistic than we typically see. Of those interviewed, 51 percent thought a \$700,000 goal was attainable, 5 percent said not likely, and the remaining 44 percent didn’t know. In addition, 58 percent of those interviewed thought there were sources in the church with the ability to make the necessary gifts, 2 percent were hopeful but not sure, 4 percent did not feel it was likely, and the remaining 36 percent didn’t know. It is very typical to see percentages of people who answer "I don't know" to these questions.

One question we typically ask in a feasibility study doesn’t impact your ability to move forward with a campaign, but it does give us a sense of financial commitment and willingness to discuss money – and that is the question about planned giving. One person indicated they have already put the church in their will, and eleven additional respondents have considered making a planned gift or bequest to the church. An additional 16 people would be open to learning about planned giving. This response is very strong and we'd recommend offering an educational program about planned giving in the next year or so.

LEADERSHIP POTENTIAL

Folks interviewed identified over 45 people who should be included in leadership positions. Eight respondents **volunteered to serve in a key leadership capacity**, and an additional 24 people indicated they will be involved in one way or another.

Launching into a capital campaign is an exciting time of renewal and growth, a time to engage emerging new leaders in a "leadership development program" by adopting a co-chair model for the campaign. We look for an overall participation factor of at least 50 percent of the church family in a capital campaign. This "stepping up to leadership" will have a long-lasting effect on the future viability of the church, as well as a guaranteed spiritual impact on those who do step up and participate. It can truly be a personal growth experience for all of those involved.

TIMING, CHURCH AND COMMUNITY READINESS

When asked about other campaigns in the area that might impact giving to this one, nothing was mentioned with any repetitiveness. A number of typical, annual-type efforts were mentioned.

Questions about the **economic situation** in the area resulted in 93 percent saying it was above average or average, with an additional 6 percent feeling that it is mixed. These percentages are actually higher than we typically hear in a feasibility study which indicated a strong confidence in the economy.

The question regarding **undertaking a campaign in the Winter/Spring of 2018** was answered with a strong positive response (79 percent). The overall sentiment was that it was time to move forward and do this.

CONSULTANTS COMMENTS

As Consultants, we look for the following as key indicators for a successful capital campaign:

- Confidence in leadership
- Support of the campaign objectives
- Willingness to participate financially
- Willingness to volunteer time in the campaign process
- Timing of the campaign
- Community economics
- Church spirit

Responses to all these indicators were very positive in this study. In fact, there wasn't a single negative indicator. It's clear to us, without hesitation, that you should move forward now. It was also clear to us that you are a generous church. The possible giving ranges that respondents were sharing were between 3 – 5.5 times what they give on a typical annual basis.

CONSULTANT RECOMMENDATIONS

1. We recommend that this feasibility study report be made available to the entire congregation, and especially to those who participated in the study.
2. In determining the feasibility of the financial goal of the campaign, we considered the following: the confidence in leadership, the support of the campaign objectives, the willingness to volunteer time in the campaign process, church spirit, and community economics. We also considered the indicated giving ranges, and the potential for giving from other regular donors. Given these factors, we recommend a goal of **\$650,000** over a three-year pledge period. (Individuals can determine the length of pledge periods to best meet their particular situations.)
3. We recommend that the campaign process be initiated in November and run through early April 2018. This timing will capitalize on the enthusiasm generated by the feasibility study, and we can work around the Nicaragua trip in February. We recommend beginning some of the project work immediately after the campaign solicitation process is complete, as this will result in stronger and more regular giving.
4. In light of the equitable support of the projects on the proposed campaign list, we recommend moving forward with the projects as proposed, but that an effort is made early in the process to clarify the projects and costs involved on the “Present,” and “Future” lists.
5. We recommend that the church members hold a special meeting of the church in November 2017 for the purpose of approving a concrete financial goal and time frame for the Capital Campaign. To ensure congregational confidence, the vote should pass by a margin in the area of about 85 percent of those present and voting.
6. We recommend that the warrant to the special meeting to vote include an article listing the desired projects and costs as best they can be determined by that point in time.
7. We recommend that the Minister and Campaign Consultant recruit the Campaign Chair or Co-Chairs using the feasibility study information before the Special Church Meeting is held.
8. We recommend that the Campaign Chair(s) recruit the Advance Gifts Chair(s) before the Special Meeting. Other Task Group chair names, as available by the time of the Special Meeting, should be listed during that meeting for informational and motivational purposes.
9. We recommend that the proposed Campaign Consultant be approved by the church membership at the special meeting.
10. All people connected with church must be invited to pledge to this campaign, whether or not they are members.

Respectfully submitted, **Jennifer D. Williams** and **Rennie Washburn**

Feasibility Study Summary of Study Questions

The Union Church

Waban, MA

September 27 - October 1, 2017

35

Interviews were completed

55

People were surveyed

CONFIDENCE QUESTIONS:

Question 1 - "When and how did you have your first contact with this church, and why did you stay?"

Average length of time in church = 13.7 years

Range of time in church = 2 to 70 years

Median of time in church = 8 years

Question 4 - "How well does the church meet the needs of the church family?"

| | | |
|---------------------------------|----|------|
| Very Well | 43 | 78% |
| Well | 2 | 4% |
| Between Very Well - Fairly Well | 3 | 5.5% |
| Pretty Good/Fairly Well | 4 | 7% |
| Don't Know | 3 | 5.5% |
| Didn't Answer | | |

Question 2 - "How familiar are you with the work of the church?"

| | | |
|------------------------------------|----|-------|
| Highly Informed | 30 | 54.5% |
| Between Highly - Somewhat Informed | 7 | 13% |
| Somewhat Informed | 15 | 27% |
| Fairly well Informed | 1 | 2% |
| Poorly Informed | 2 | 3.5% |

Question 5 - "How well does the church meet the needs of the people in the area?"

| | | |
|---------------------------------|----|-----|
| Very Well | 11 | 20% |
| Between Very Well - Fairly Well | 5 | 9% |
| Fairly Well/Well | 26 | 47% |
| Not Too Well | 2 | 4% |
| Other | 7 | 13% |
| Don't Know | 3 | 5% |
| Didn't Answer | 1 | 2% |

Question 3 - "How well does the church meet your needs?"

| | | |
|---------------------------------|----|-----|
| Very Well | 44 | 80% |
| Between Very Well - Fairly Well | 1 | 2% |
| Fairly/Moderately/Pretty Well | 8 | 14% |
| Meets some needs | 1 | 2% |
| Room for growth | 1 | 2% |

**Feasibility Study Summary of Study Questions
The Union Church
Waban, MA
September 27 - October 1, 2017**

CONFIDENCE QUESTIONS, Continued:

Question 6 - "How would you describe the effectiveness of church lay leaders in leading the church?"

| | | |
|--------------------------------------|----|-----|
| Very/Extremely Effective | 36 | 65% |
| Between Very Effective - Effective | 1 | 2% |
| Effective | 14 | 25% |
| Getting Better/Greatly Improved | 2 | 4% |
| Wide Gamut | 1 | 2% |
| Always trying to keep everyone happy | 1 | 2% |

Question 7 - "How would you describe Stacy's effectiveness in meeting the church's needs?"

| | | |
|------------------------------|----|-----|
| Beyond Very Effective/Highly | 6 | 11% |
| Very Effective | 48 | 87% |
| Effective | 1 | 2% |

Question 7b - "How would you describe Amy's effectiveness in meeting the church's needs?"

| | | |
|--------------------------|----|-----|
| Great!/Excellent/Awesome | 9 | 17% |
| Very Effective | 42 | 81% |
| Moderately Effective | 1 | 2% |
| Didn't Answer | 3 | |

Question 8 - "Does the present church leadership have the ability to motivate people to give substantial amounts of money?"

| | | |
|---------------------------|----|-----|
| Definitely/Yes/Absolutely | 19 | 35% |
| Possibly | 10 | 18% |
| Probably | 22 | 40% |
| Doubtfully | 1 | 2% |
| Don't Know | 3 | 5% |

**Feasibility Study Summary of Study Questions
The Union Church
Waban, MA
September 27 - October 1, 2017**

PROJECT QUESTIONS:

Question 9 - "Are you familiar with the church's proposed campaign components?"

| | | |
|----------------------|----|-----|
| Yes | 32 | 58% |
| Somewhat | 12 | 22% |
| No | 10 | 18% |
| Didn't need the info | 1 | 2% |

Question 10 - "What is your reaction to the scope of these projects and costs?"

| | | |
|-------------------|----|-----|
| Enthusiastic | 23 | 43% |
| Required | 11 | 21% |
| Mixed Feelings | 16 | 30% |
| Not Enthusiastic | 1 | 2% |
| A little reaching | 1 | 2% |
| Overwhelming | 1 | 2% |
| Didn't Answer | 2 | |

Question 11 - Positive/Negative feedback about projects:

POSITIVE

All of it 3

Stewarding Our Past

| | |
|-----------------------------|----|
| Roof | 6 |
| Elevator | 36 |
| Front Stairs | 17 |
| Landscaping | 16 |
| Physical Plant Work | 1 |
| Structural Repairs | 3 |
| Foundation being maintained | 2 |
| | 1 |

Shepherding Our Present

| | |
|--------------------------------|----|
| Inclusive and Engaging Worship | 3 |
| Sound System | 2 |
| Media System | 3 |
| Organ | 2 |
| Children and Youth Program | 7 |
| Community Engagement | 14 |
| Kitchen | 3 |
| Bathroom | 2 |
| Internet | 3 |
| | 1 |

Strengthening Our Future Projects

| | |
|-----------------------|----|
| Greening Our Building | 3 |
| Mission Outreach | 17 |
| LED lighting | 14 |
| | 2 |

NEGATIVE

#

Stewarding Our Past

| | |
|-------------|---|
| Elevator | 1 |
| Landscaping | 6 |

Shepherding Our Present

| | |
|----------------------------|---|
| Sound System | 2 |
| Media System | 4 |
| Organ | 2 |
| Children and Youth Program | 4 |
| Kitchen | 1 |
| | 5 |

Strengthening Our Future Project

| | |
|------------------------------|---|
| Mission Outreach | 1 |
| Future Things Less Important | 3 |
| Green House | 2 |
| | 1 |

**Feasibility Study Summary of Study Questions
The Union Church
Waban, MA
September 27 - October 1, 2017**

Question 11, cont. - Questions about projects:

Don't understand "Present" and "Future" lists. Why?
Need more info. (2)
Hope list gets more firmed up
Some projects are vague - Hard to know.
Shepherding our present, what are we getting for 250k?
Elevator
Elevator-is there warranty?
Elevator-repair or replace?
Is Landscaping needed?
Kitchen-what work?
What does the organ need?
Organ-he doesn't play it often
Organ-how vital? Don't use much.
Organ - Is it really worth it? Not used much, but is that because it needs repair?
Unsure about updating the Children and Youth Program
What else do we need for enhancing kids program?
Will changing the children's space make a difference?
Specificity around greening is needed
Greening-good idea generally, but what exactly?
If we're looking at the roof - green options - what are the priorities?
Would like to see more of a breakdown of the projects/costs
What is the sustainability? Perfect place to embrace

Question 12 - "Are there other projects you think the church needs to fund that aren't listed as part of the campaign?"

Hire Sunday School Teachers
Competitive Salaries
We are not competitive about salaries
Minister Salaries
Endowed salaries
Professional development for staff
Continue to support staffing for CE/youth
Dedicated and paid Sunday School teachers
Directory-need more info about people.
Efficiencies we can improve on
Energy Efficient Windows
Increase Operating Budget
Kitchen Sink
Lower level bathrooms
More mission revitalize
Panels? Windows?
Solar Panels?
Practical education/more opportunities
Some Interior Decoration-its tired.
Sometimes things come up unexpectedly-need to be prepared for that.
Are there things we should do for affordable housing?
Bike rack-no place to leave bike if you ride to church
Church growing: are we eventually going to need more space?
Resources dedicated to a sextant. All volunteer-we need a custodian.
Additional Bells

**Feasibility Study Summary of Study Questions
The Union Church
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September 27 - October 1, 2017**

TESTING THE GOAL QUESTIONS:

Question 13 - "Do you feel that a goal of \$700K is realistic and attainable with a three-year pledge period?"

| | | |
|-----------------------------|----|-----|
| Very Likely/Yes | 8 | 15% |
| Very Likely-Likely/Possibly | 5 | 9% |
| Likely | 15 | 27% |
| Unlikely/No | 3 | 5% |
| Do not know | 24 | 44% |

Question 14 - "In your opinion, are there sources in the church with the ability to make these kinds of gifts?"

| | | |
|-----------------|----|-----|
| Yes | 22 | 40% |
| Probably/Likely | 10 | 18% |
| Possibly | 1 | 2% |
| Not Likely | 2 | 4% |
| Do Not Know | 20 | 36% |

Question 15 - "Can you foresee your own gift falling in any of these areas (on gift chart)?" (Out

| | | |
|-----|----|-----|
| Yes | 34 | 97% |
| No | 1 | 3% |

Question 16 - "Would you support the campaign financially at some level?" (Only asked if answered "No" to Q15)

| | | |
|-----|-----|---|
| Yes | 100 | % |
|-----|-----|---|

Question 17 - "Can you foresee your own gift being one of the leadership gifts of \$70,000 or more, over three years?" (Out of 35)

| | | |
|-------|----|-----|
| Maybe | 1 | 3% |
| No | 34 | 97% |

Question 18 - "In what range or ranges do you see your gift being, over three years?"
CONFIDENTIAL INFORMATION

Question 19 - "Who do you think is capable of giving the top three to five gifts?"
CONFIDENTIAL INFORMATION

Question 20 - "Have you considered making a planned gift or a bequest to the church?"
CONFIDENTIAL INFORMATION

Question 21 - "Is there anything else you'd like to say about your gift?"
CONFIDENTIAL INFORMATION

**Feasibility Study Summary of Study Questions
The Union Church
Waban, MA
September 27 - October 1, 2017**

LEADERSHIP QUESTIONS

Question 22 - "Who do you feel would be the best person to serve as key leader of the campaign?"

CONFIDENTIAL INFORMATION

Question 23 - "Who else will have to be involved if the campaign is to be successful?"

CONFIDENTIAL INFORMATION

Question 24 - "Would you be willing to serve in a leadership capacity?"

| | | |
|------------------|----|-----|
| Yes | 8 | 15% |
| In a limited way | 16 | 30% |
| Maybe | 8 | 15% |
| No | 22 | 40% |
| Didn't Answer | 1 | |

Question 25 - "In what role would you be willing to serve?"

CONFIDENTIAL INFORMATION

**Feasibility Study Summary of Study Questions
The Union Church
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September 27 - October 1, 2017**

TIMING QUESTIONS

Question 26 - "Do you think the timeframe of November 2016 - March 2017 is a good time for the church to conduct its campaign?"

| | | |
|--------------------------|----|-----|
| Yes | 42 | 79% |
| Mixed feelings | 5 | 9% |
| No | 2 | 4% |
| It doesn't matter | 4 | 8% |
| No Opinion/Didn't Answer | 2 | |

Question 29 - "How would you describe the economic situation in the area?"

| | | |
|--------------------|----|-----|
| Excellent | 31 | 57% |
| Above Average | 19 | 35% |
| Mixed/Wide Variety | 3 | 6% |
| Don't Know | 1 | 2% |
| Didn't Answer | 1 | |

Question 27 - "If No, would you like to suggest a time?" (Asked only if answer to Q26 = No, Maybe, or Don't know)

| | | |
|---------------------------|---|-----|
| Into Spring a little more | 1 | 50% |
| Starting in the new year | 1 | 50% |

Question 29 - "How would you describe the church spirit?"

| | | |
|---------------|----|-----|
| Excellent | 40 | 73% |
| Above Average | 14 | 25% |
| Very Strong | 1 | 2% |

Question 28 - "Do you know of any major campaigns that have been conducted in the area lately or are in the planning stages that may affect the giving to this campaign?"

| | |
|--------------------------------|---|
| Suzuki School | 1 |
| Various school fundraisers | 3 |
| Possible political fundraising | 5 |
| Relief fundraising | 3 |
| The island across the street | 2 |

Question 30 - "Is there anything else you'd like to say?"

see comment section