

PLANNING STUDY

Executive Summary



St. Pius X
Catholic Church
and School



Study Participants



70

Personal
interviews



345

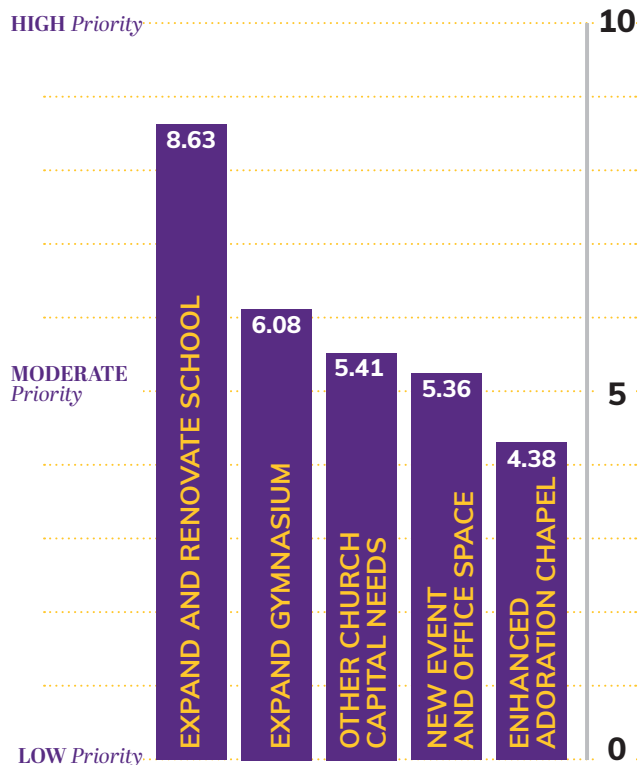
Mail, online and
in-pew surveys



25%

Total parish
participation

Priority of Respondents



OVERALL OBSERVATIONS

• STRONG AND GROWING SCHOOL COMMUNITY

Across the board, parishioners recognize the school as a major strength. Enrollment is rising, parents value the Catholic identity and academic quality, and many see the school as central to the parish's long-term vitality. This growth underscores the need for improved facilities and thoughtful planning.

• DESIRE FOR GREATER UNITY BETWEEN CHURCH AND SCHOOL

Many comments reflect a shared longing for deeper connection and collaboration. Parishioners want a more unified community identity and believe stronger church – school relationships will benefit the parish's mission and the campaign's success.

• NEED FOR STRONG COMMUNICATION AND TRANSPARENCY

A recurring theme is the desire for clear, consistent communication – especially regarding finances, project priorities, and the rationale behind campaign decisions. Parishioners express more willingness to give when they feel fully informed and included.

• BROAD AGREEMENT ON FACILITY NEEDS, WITH QUESTIONS ABOUT PRIORITIES

While most parishioners agree the campus – especially the school – needs additional space, improved safety, and better functionality, they also raise thoughtful questions about project priorities, including the cost and purpose of the event space. There is a desire to ensure investments align with the most urgent needs.

• OPENNESS TO SUPPORTING A CAMPAIGN, DEPENDENT ON CLARITY AND LEADERSHIP ALIGNMENT

Many express generosity and willingness to contribute, but their support is contingent on transparent plans, collaborative leadership, and confidence in the decision-making process. Engagement and alignment among parish leaders are viewed as key to building trust and inspiring community wide participation.

Key Statistical Findings



87% of respondents personally favor a capital campaign, including 92% of those interviewed.



90% of respondents will make a personal gift to the campaign, including 94% of those interviewed.



96 respondents indicated they would serve in a leadership position.



47 families have remembered the parish in their estate plans.



36 families are interested in learning more about how to make a planned gift.



School family vs non-school family data

Category	School Families	Non-School Families
Number Participated	128	287
% of Total Respondents	31%	69%
% in Favor of Campaign	94%	82%
% Who Will Make a Financial Gift	94%	85%
Gift Range	\$795,800 – \$2,857,800	\$2,822,612 – \$2,960,412
Willing to Serve in Leadership	49	47
Priority Ratings		
School Renovation & Addition	9.7	8.6
Gymnasium	7.6	5.6
Event Space	4.8	6.3
Adoration Chapel	3.7	5.2
Other Church Capital Needs	4.1	6.5



Fundraising Potential

Based upon the positive results of the planning study, the Steier Group recommends that St. Pius X Catholic Church immediately moves forward into the preparation phase of a 32-week campaign, beginning the week of January 12.

The Steier Group projects that St. Pius X will raise \$6.5 million to \$10 million over the three-year pledge period by using the firm’s recommended timeframe and approach.

Recommendations

FINALIZE CAMPAIGN GOALS

- Work with the Archdiocese of Indianapolis to secure approval to move forward with a campaign.
- During conversations with the archdiocese, clarify requirements to include an endowment component to the campaign. If necessary, ensure that endowment is incorporated into the ultimate campaign goals.
- During the preparation phase of the campaign, it will be important to finalize the projects, goals and estimated costs. Consider utilizing the parish's existing facilities committee to assist with this process. Committee members can work with contractors and architects in developing plans that meet the needs of both the church and school.
- To increase engagement, consider adding representatives from the pastoral council, finance council and school commission to the facilities committee. The group could even be rebranded as the "vision committee", charged with finalizing the master facilities plan that will be presented during the campaign.
- When finalizing the projects and goals, be sure the decision-making process incorporates feedback from the study, including the projected funding potential.
- During the study, several themes emerged regarding specific projects. This feedback should be considered when prioritizing the master plan.



EVENT SPACE REVISION

Many parishioners expressed concern over an events space that would be mostly dedicated for church use. Consider revising the event space concept to a true multi-purpose room that also functions as a gym. This eliminates the need and cost of a separate half-gym and creates a more efficient, flexible design that can be used by both the church and school communities.

ADORATION CHAPEL

This proposed project was judged as the lowest overall priority by respondents. However, there is a small contingent of parishioners – including a major donor – who strongly feel this renovation should move forward. That donor has agreed to fully fund this project. Secure this commitment and, if possible, publicly announce the commitment around the 21st of the month (likely February or March), which holds specific significance for the donor. This would allow the parish to complete the adoration chapel renovation separate from the campaign and leave the balance of the parish community to concentrate on funding the more popular plans.

CHURCH CAPITAL PROJECTS

Many parishioners were confused about the description for "other church capital needs." It will be important to define these projects for the campaign. Possibilities include new carpeting, pew refinishing and stained-glass windows.

- Once the projects are finalized, the Steier Group strongly recommends implementing a tiered goal structure to communicate the campaign goals. This allows the parish to celebrate fundraising milestones and provides a pathway for construction priorities. For example:

SCENARIO A

(using only the projects tested in the planning study and reflected by their finalized priority rating)

Tier #1: \$5.1 million

- School renovation and expansion (\$5.1 million)

Tier #2: \$7.05 million

- Expand gymnasium (\$1.5 million)
- Church capital projects (\$450,000)

Tier #3 \$11.35 million

- Event space and parish office expansion (\$4.3 million)

SCENARIO B

(possible revision of goals based on priority ratings and parishioner feedback)

Tier #1: \$5.1 million

- School renovation and expansion (\$5.1 million)

Tier #2: \$6.55 million

- Church capital projects (\$450,000)
- Office addition or renovation (\$1 million)

Tier #3: \$10 million

- Multi-purpose room that will connect all the buildings (\$3.45 million)

NOTE: the scenarios listed above are illustrations of how campaign goals can be tiered. It will ultimately be up to parish leadership to decide what projects are pursued and in which order they are sequenced. It is the Steier Group's opinion that, based on data and feedback, parishioners would be much more apt to financially support scenario B or something that is a revisioning of the plan tested in the study.

Recommendations (cont.)

RECRUIT A STRONG CAMPAIGN LEADERSHIP TEAM

- Begin identifying and recruiting a strong, diverse volunteer team to work on the capital campaign. Solidify commitments from key individuals identified in the planning study, including representatives from the pastoral council, school commission and finance committee. Include parishioners across different generations and different demographics.
- Secure 2-4 families to serve as general chairs of the campaign. These leaders will be responsible for working with the Steier Group to implement all facets of the campaign while collaborating with the parish staff to ensure the effort stays on track and on budget.
- Ensure the parish finance council also provides oversight of the campaign, tracking and transparently communicating funds available to cash-flow construction projects.

IMPLEMENT A COMPREHENSIVE COMMUNICATIONS PLAN

- Share the planning study results and campaign plan through a letter to the entire St. Pius X community. Emphasize the positive results of the study and the intention of the facilities committee to finalize the campaign projects and goals based on the study responses and the projected fundraising capacity.
 - If the timing aligns, also announce that the Archdiocese of Indianapolis has granted formal permission to move forward with a campaign.
- Work with the Steier Group to design a comprehensive communications plan that will educate parishioners on the needs facing the parish and school. The plan could include but is not limited to:

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|--------------------------|-------------------------|------------------|------------------------------|
| ■ Bulletin announcements | ■ Case statements | ■ Email/E-blasts | ■ FAQ document |
| ■ Pulpit announcements | ■ Campaign thermometers | ■ Social media | ■ Parish and school websites |
| ■ Brochures | ■ Campaign video series | ■ E-newsletters | |

- Should the parish decide to task the facilities committee with finalizing the campaign's projects and goals, provide regular updates to the community detailing the progress. This will increase engagement and reinforce the notion that the master plan is being assembled with the assistance of lay leaders.
- Once the projects and goals are finalized, hold a parish informational session to unveil the plans, explain the rationale for those plans and answer questions. This should address any previous concerns about the transparency of the process.
- As part of the communications plan, inform parishioners about improvements that have already been completed around the parish. A recent facilities assessment report detailed needs around campus. It is important to let the community know what progress has already been made on those items and what projects remain priorities.
- During the study, many parishioners expressed confusion about the "other church capital needs." Take extra care to communicate the church capital projects, why they are needed, and how they will enhance the worship space.
- Should the parish decide to alter the proposed events space to a multi-purpose facility, stress the collaboration that will be needed to accommodate both the church and school communities. This shared space will be an active hub that hosts multiple events and therefore will require coordination for reservation of space.
- With the development of Indiana's school choice program, and the burgeoning demand for a St. Pius X education, create comprehensive growth projections for the school. This will underscore the need for expansion, allow the parish to communicate its long-term vision for enrollment and demonstrate how this capital campaign will meet future needs.





FINALIZE CULTIVATION AND SOLICITATION STRATEGY

- Throughout the preparation and solicitation phases of the capital campaign, plan and host targeted donor cultivation events to share the broad vision for the parish and school. Take care to address the concerns that were shared during the planning study.
 - Consider small group dinners with the larger potential donor families.
 - Consider community wide event to correspond with the public kickoff.
- Implement a lead gift appeal strategy that involves securing the largest gifts early so that other parishioners, parents and prospective donors are challenged to give at a higher level.
- Consider developing a personalized proposal for each potential lead gift donor that lays out the case for support and takes into account each prospect's preferred project(s) as shared during the planning study.
- Develop challenge gifts to motivate new families, or those who have been financially inactive, to invest in the future of the parish and the school. Note that a parishioner has already said they were willing to provide a challenge gift. Challenge vehicles could include:
 - A dollar-for-dollar match up to a certain level.
 - A participation challenge.
 - A challenge where dollars are matched from all commitments made by new donors.
- Secure enough campaign volunteers so that the parish can approach the top 500 potential donors through personal visits.
- Develop naming opportunities designed to attract interest from major potential donors. Naming rights may include rooms in the school or the new multi-purpose space.



Proposed Campaign Timeline and Structure



The Steier Group recommends that St. Pius X Catholic Church implement a 32-week capital campaign that is structured as follows:

Preparation Phase

16 weeks

(January – April)

This focus of this section will be working with parish leaders on obtaining archdiocesan approval, finalizing the campaign projects and goals, sharing the positive results of the planning study, identifying and recruiting lay campaign leadership, designing a comprehensive communications plan, preparing all campaign operational and promotional materials, conducting donor evaluation, and developing personalized cultivation and solicitation strategies for potential lead gift donors.

Leadership Gift Phase

6 weeks

(May – June)

Also known as the “silent phase,” this section will involve securing gifts from the entire campaign volunteer team as well as a small group of potential major donors. Father Francis, campaign leaders and the Steier Group will personally visit these families to secure commitments.

Public Phase

8 weeks

(June – August)

Once gifts have been secured from campaign leaders and major donors, St. Pius X will move into the “public phase” of the campaign. The campaign volunteer team and the Steier Group will request support from the remainder of the parish. The Steier Group will keep the parish up to date on the campaign progress throughout the entire effort.

GRANT WRITING (throughout the campaign)

Foundations will be researched by the Steier Group and prioritized with input from parish leaders. The Steier Group will manage the process of contacting feasible foundation prospects, securing application guidelines and submitting formal requests. The Steier Group will work to uncover any personal connections between foundation board members and campaign leaders or volunteers that may increase the parish’s chances to secure funding for this campaign. This process will continue throughout the campaign. See the Appendix for a list of foundations identified as possible funding sources for this capital campaign.

FOLLOW-UP PHASE (end of the campaign)

As personal appeals are completed, the Steier Group will coordinate campaign calls to target those families who have not yet responded. Additionally, a “Commitment Weekend” will be held to offer parishioners an opportunity to make a campaign commitment during Mass. At the conclusion of the entire effort, a final direct mail appeal will target those who have not yet responded, providing them with a final opportunity to participate in the campaign.

