

2010

Master Plan

2010 - 2020

A long-range plan for the development of physical space to meet the changing needs of the faithful members of St. John Neumann Parish



SAINT JOHN NEUMANN PARISH

Master Plan

2010 - 2020

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SAINT JOHN NEUMANN CATHOLIC CHURCH

801 W. Cherry Street, Suite 120
Sunbury, Ohio 43074-8005



May 31, 2010

Dear Parishioners:

Since my appointment as Pastor of Saint John Neumann Parish in 2005, the number of families in the Parish has more than doubled, growing from 430 families at the end of 2004 to 970 families at the end of 2009. Based upon this five year trend and demographic studies, the Saint John Neumann Long Range Planning Committee forecasts this growth trend to continue, anticipating over 100 new families each year for the next 10 years. This projection factors in the recent downturn in area housing construction, due to the recession. In addition, the number and size of Parish programs and ministries has increased at a rapid pace, and I expect that trend to continue. Our people are spiritually hungry and keep coming up with new ways to meet the needs of our faith community.

The growth we have experienced at St. John Neumann requires that we plan for the future. In 2006, I asked the Long Range Planning Committee to begin working on a Parish Long Range Master Plan that would serve as a guide and a compass, anticipating our space needs so we wouldn't be forced to react to them. The tasks are fulfilled in the following pages. While our growth has caused us to temporarily respond to certain events (e.g., moving Parish offices and PSR off campus), this Master Plan thoughtfully and prudently considers the total current and future needs of St. John Neumann Parish.

The Master Plan also describes and documents in detail the processes and steps the Long Range Planning Committee used and followed in the development of this long range plan, providing a model for updating the plan in the future. As you will see, thorough due diligence was employed in producing this long range future plan.

I would like to thank the members of the Long Range Planning Committee for their dedicated and consistent work of helping our Parish plan for its future. The information documented in this Master Plan has helped guide us as a faith community trying to plan for growth in our membership, programs and facilities. I believe this Master Plan will help our Parish plan beyond the next ten years, too. I would also like to thank those parishioners who participated in interviews and focus groups, completed surveys, participated in the feasibility study, and committed their financial resources for the benefit of our future. May God bless us all in our future planning and providing for the needs of the next ten years and beyond.

Sincerely,

A handwritten signature in black ink, appearing to read "Fr. David W. Sizemore".

Father David Sizemore

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Saint John Neumann Parish

Master Plan

2010 - 2020

EXECUTIVE SUMMARY

In its short 33 year lifespan, St. John Neumann Parish (“SJN” or “the Parish”) has experienced tremendous growth, not only in the number of families, but in the number of faith-filled programs and ministries, and especially in the Parish’s faith and devotion to Jesus Christ. A Parish that began in what was a very rural area in 1977, SJN has retained its rural character despite growth in the Sunbury and Southeastern Delaware County areas.

The Parish Long Range Planning Committee (“LRPC” or “Committee”), a subcommittee of the Parish Finance Committee, is comprised of the Pastor, Deacon, two co-chairs, and active members of the Parish community. The purpose of the LRPC is to advise the Pastor in his administration of the Parish by anticipating, analyzing and evaluating the needs of the Parish community through open dialogue with parishioners and periodic review of external factors such as demographic and economic changes. In collaboration with the Pastor, the LRPC is responsible for the initial publication and ongoing maintenance of the SJN Parish Master Plan document.

In 2006, at the request of Fr. David Sizemore, the LRPC began the master planning process aimed at identifying and prioritizing the space needs of the Parish. After almost 4 years of hard work and in-depth analysis, the Committee identified the most immediate needs of the Parish – to provide adequate social, classroom & office space, and additional parking as soon as possible.

The process of identifying and prioritizing needs at SJN occurred in three phases. Phase I – Needs Assessment; Phase II – Feasibility & Fundraising; and Phase III – Pre-Construction. These phases are described in detail in the following pages. Throughout all three phases, the Committee’s most important task was to maintain open dialogue with Parishioners, keeping them informed of its progress and of the outcomes of its analyses, and soliciting input from Parishioners on all important issues.

The Committee began with an assessment of SJN’s “physical plant,” that is, its land and buildings. This assessment also included an assessment of SJN’s financial condition, and how the physical plant impacts the Parish’s bottom line (and vice versa).

Given the global economic and financial crisis that enveloped most of the four years of planning, the Committee paid particular attention to how these factors may alter present and future conditions at the Parish. When making financial and other projections, these factors were taken into account.

Phase I of the Master Planning process, Needs Assessment, was the most critical phase of the entire process, as it involved assessment of demographic trends, assessment of Parish programs, ministries and families, assessment of Parish facilities, and an assessment of Parish finances over the long-term. The demographic assessment included analysis of population trends, building trends, Parish membership trends, and other relevant factors affecting growth. The program assessment involved assessing the needs

of parishioners and Parish programs. Facilities assessment involved working with Parish groups and ministries to assess their current and future space needs. The financial assessment involved making a conservative 10-year projection of income and expenses.

The Committee's assessment of demographic trends and conditions resulted in the following conclusions:

- The availability of the new Church facility in 2005 likely contributed to sustained growth.
- Overcrowding or lack of adequate facilities at neighboring Parishes may have affected the decisions of families to join SJN.
- The attraction of SJN's sense of community, programs, pastoral staff, and music program likely contributed to Parish growth.¹
- Based upon compound annual Parish growth of 22.47% from 2005 – 2009, a period when population rates and building permit issuances were decreasing, the Committee concluded that Parish growth rates likely would continue into the future. The Committee projects net annual growth of 105 families through 2020, with a conservative scenario being 75 families per year, and an aggressive expectation of 125 families per year.

The program and parishioner needs assessment process involved interviews, focus groups, and a full Parish survey to collect parishioner input. Interviews and focus groups were held with parishioners and Parish groups, and the information obtained was used to shape a Parish-wide needs assessment survey. A cross section of the Parish comprising 30% of all registered parishioners responded to the survey, which was administered via the Internet over the course of 4 weeks. The Committee clearly concluded from survey results that a new Social Hall was the most pressing priority, with classroom and office space as additional priorities. Moreover, an overwhelming majority of respondents expressed a willingness to financially support a future construction process above and beyond offertory giving.

Once the Parish facility needs and priorities were identified in the program assessment, the Committee performed a facilities assessment which, like the program assessment, involved interviews with Parish Staff, and with every committee, ministry, prayer group, and program at SJN. The Committee tried to determine how Parish facilities were being utilized, and how often, and which activities were taking place off-site. In addition, at the request of the LRPC, greeters at all SJN weekend Masses counted attendance every weekend Mass for three straight months so the Committee would have reliable information about utilization of the Church and parking lots.

In performing its facilities assessment, the Committee also visited five Churches who had recently undertaken building projects involving parish centers. The tours yielded valuable insight and information for the Committee.

The final, and equally important assessment performed by the Committee was the financial assessment. Using conservative estimates, a 10-year pro forma was assembled detailing expected income and expenses for 2010 – 2019. The pro forma indicated that SJN is on solid financial ground, and will continue to provide for the Parish in an acceptable manner. It also indicated that projections do not provide the additional resources needed to build a Parish Center and return the Parish offices to the SJN campus.

Phase II of the Master Planning process centered upon the feasibility of obtaining funding for the proposed construction project. This phase involved two processes, Construction Planning and Fund Raising.

¹ This information was obtained from the Parish-wide survey discussed under Program Assessment.

Based upon information obtained in Phase I, the Committee solicited proposals from architects to design and estimate the cost of the Parish Center. Prior to issuing the Request for Proposal (RFPs) the Committee assembled a “Program”, spelling out Parish space needs, and stating exactly how these needs should be incorporated into a construction plan for the new Parish Center.

Ten architectural firms were invited to submit proposals. Of those, eight firms attended the Committee’s pre-proposal meeting at SJN. Five firms submitted proposals, and four of those firms were invited back for more detailed interviews with the Committee. In the end, the firm Meacham & Apel (M&A) was selected for the project. M&A proposed renovating the current Social Hall for Parish Offices (7,416 square feet), and building a 31,000 square foot (including basement) facility with classrooms in the lower level, and a large social space and kitchen in the upper level, for an estimated total project cost of \$3.2 million.

With initial renderings and a project cost estimate in hand, the Committee sought to determine the feasibility of raising funds for the Parish Center project. As with the architectural hiring process, representatives of the Parish formed a selection committee to hire a feasibility/fund raising consultant. An RFP was issued, and eight consultants responded. Three were selected for interviews by the selection committee. The Cunneen Company based in Hamden, CT, was selected. One of the firm’s regional directors, based in Cincinnati, was assigned to the SJN project.

Cunneen initiated the feasibility study by personally interviewing 86 Parish families, all of whom either were major donors or active group leaders. In the interviews Cunneen tried to assess the level of financial support the Parish could expect from the interviewees, and who would be willing to assist in fund raising efforts. Once the initial interviews were completed, Cunneen developed and issued an “in-pew” survey for Parishioners, to which 312 Parish families responded.

From the interviews and surveys, Cunneen determined that SJN feasibly could expect to raise between \$2,822,000 and \$3,036,000 from the campaign. Based upon the difference between the estimated construction cost and the expected amount from fund raising, the Committee met with Meacham & Apel to adjust the construction plans to bring costs in line with fund raising.

The Committee updated parishioners about the feasibility study at all Masses on Pentecost Sunday, 2010, and held “town meetings” after each Mass to allow parishioners a chance to provide input on the final design.

Initial fund raising efforts, which have not taken place as of this writing, will focus on receiving 100% in pledges from parishioners, and collecting 50% of the total estimated construction cost before proceeding with ground-breaking, a Diocesan requirement to proceed with new construction. Once 50% is collected, the Diocese of Columbus will extend a temporary “bridge” loan to the Parish, allowing the Parish to construct the new Parish Center, while it continues to collect on the remaining 50% pledged by parishioners.

After the Parish Center and Office Renovations are completed, and the related debt has been eliminated or significantly reduced, the LRPC will consider the next master planning stage - Expansion of the Church².

The anticipated timeline for the first major stage of the Master Plan (i.e., construction of the Parish Center and Office Renovations) covers most of the ten year period addressed in this Plan.

² The next stage is anticipated from the Needs Analysis completed in 2009. Analysis performed at a later time may produce new or different priorities and projects.

Long Range Planning Committee members responsible for developing this Master Plan include:

Father David Sizemore	Deacon Carl Calcara	Sarah Delaney	Pat Grenell
Bob Hetterscheidt	Mike Kilcher	Jack Kuhn	Kim Mazzon
Phil Panzarella	John Powers	Tim Price	Phil Roblee
Bob Scott	Judy Simmons	Kandi Smith	Bill Steinhoff
Jackie Sutton	Larry Tornes	John Wallace	Bob Walter
	Shane Whitacre	Sherry Whitacre	

BACKGROUND AND OVERVIEW

The purpose of this Master Plan is twofold. First, it is to provide all interested parishioners with the background information they need to understand the intent of all recommendations made by the LRPC. Secondly, this document is to act as a guide for all future Parish Planning Committees.

PARISH HISTORY³

SJN Parish was founded in 1977 as a mission of St. Paul's Parish in Westerville, located approximately 10 miles south of Sunbury. The first Parish Mass was held at the American Legion Hall in Sunbury, and after five weeks due to the influx of attendees, the Mass had to be moved to a larger facility. In September, 1977, Masses were held in the Harrison Street Elementary School gymnasium until the original Church was constructed in 1983.

The original Parish rectory/office was located at the corner of St. Route 36/37 and Domigan Road. In 1996, the Parish purchased an additional 9.5 acres of property north of the Church, which included a home. The home was refurbished and used as the rectory, Church office, classrooms and meeting rooms.

The influx of new parishioners continued throughout the 1980s and 1990s, and by 2002, Church demand exceeded Church capacity. The Parish broke ground on a new Church building in September, 2003, and in September 2004 the new Church was dedicated.

The original Church was refurbished as classroom and meeting space (renamed the "Social Hall"), and upon completion, classes and meetings were moved from the rectory to the Social Hall.

In 2007, Parish offices were relocated to leased office space at 801 West Cherry Street. In 2009, due to lack of capacity in the Social Hall, PSR classes were relocated to Big Walnut Elementary school facilities in a lease agreement with the Big Walnut School system.

Pastors of St. John Neumann include Father Pat Toner (1983 - 1985), Monsignor Tom Bender (1985 - 1993), Father Carmen Arcuri (1993 - 1994), Father James Walter (1994 - 2005), and Father David Sizemore (2005 - Present).

MASTER PLANNING AT ST. JOHN NEUMANN

The LRPC is a subcommittee of the Parish Finance Committee, whose mission is to assist the Pastor and the Parish Council in planning for the maintenance and growth of the Parish. The LRPC is comprised of the Pastor, Deacon, two co-chairs, and active members of the Parish community. The purpose of the LRPC is to advise the Pastor in his administration of the Parish by anticipating, analyzing and evaluating the needs of the Parish community through open dialogue with parishioners and periodic review of external factors such as demographic and economic changes. In collaboration with the Pastor, the LRPC is responsible for the initial publication and ongoing maintenance of the SJN Parish Master Plan document.

The LRPC identified three overall phases to the planning process. Phase I, Needs Assessment, is intended to garner information needed to guide decision making and set priorities. Phase II, Feasibility, is intended to understand the building and financial requirements. Finally, Phase III, Pre-Construction, consists of the

³ Much of the information contained in this section was obtained from St. John Neumann Catholic Church Parish Information Booklet, 2009 Parish Directory, Time & Talent Opportunities, under the section entitled "History of the Parish."

capital campaign and the actual pre-building process. During each phase, the makeup of the LRPC was adjusted to best represent the needs at that particular time.

Throughout all three phases, the LRPC also is responsible for fully understanding the sources and uses of Parish revenues and recommending reliable funding options to support the Parish Master Plan. The committee plays a significant role in capital campaigns, including gathering information from other Churches who have undergone similar capital campaigns and information on consulting firms, which specialize in raising capital.

SAINT JOHN NEUMANN, PRESENT AND FUTURE

SAINT JOHN NEUMANN TODAY (2010)

The physical plant of SJN Parish currently consists of 24 acres of land, with parking for approximately 185 vehicles (including four handicapped spaces), and improvements which include the Church (10,982 square feet, accommodating up to 704 people), the Social Hall (7,416 square feet) with kitchen facilities, a storage garage (1,204 square feet), Pauline's Pavilion (2,106 square feet of open, covered space), the Rectory (2,877 square feet), a pond, an outdoor Altar, several foot bridges, and a playground area. In addition, the Parish leases approximately 1,462 square feet of office space off campus, and leases classroom space from the Big Walnut School District for Parish PSR classes.

In 2010, SJN Parish is home to more than 84 diverse Catholic ministries and programs, covering such broad areas as Parish information, social and community life, religious education for children, social justice and outreach, adult religious education, spiritual life ministry, men's and women's activities, and Parish assistance. The Parish also is home to over 970 registered families, and many loyal participants who remain unregistered. Mass times are Saturday at 4 pm, Sunday at 9 am and 11 am, Tuesday at 6 pm, and Wednesday through Friday at 11 am. In addition to the Pastor, the Parish is staffed by four full-time and nine part-time employees.

During fiscal year 2010 Parish income is projected to be \$707,365, with \$672,245 coming from offertory. Parish expenses are projected to be \$686,162 at fiscal year end.

In order to provide context, it is appropriate to address the economic and financial environment of 2008 – 2010, during which most of the work for this Master Plan was completed.

The sub-prime mortgage crisis of 2008 sparked a downward spiral of financial markets around the globe, leading to massive illiquidity in equity and credit markets, the failure or near failure of worldwide financial systems, and unprecedented policy intervention on the part of world governments. The U.S. experienced economic and financial dislocations not seen since the Great Depression, including unprecedented losses in asset values (stocks, bonds, real estate, etc.), soaring unemployment, increasing petroleum prices, and higher taxes as the effects of the economic decline negatively impact federal, state, and local governments.

In 2010, most people claim to know at least one unemployed friend or family member, and many can name at least two. Inflation pressures are mounting in the U.S., and fear guides the decisions of many families as they consider their uncertain futures.

Yet, with few exceptions the families of SJN continue to support the Parish in the form of participation, and by their continued financial support through weekly collections and Parish debt reduction payments. As new home construction comes to a virtual halt in the central Ohio area, the Parish continues to grow as more and more families come to know the religious community of hope and love which is SJN Parish.

SJN is a diverse community of faith-filled parishioners led by a vibrant group of professional and lay ministers and staff. The Parish, which has experienced continued growth in all areas, is financially sound, and spiritually strong. Its future is bright, as the lights of faith, hope and charity lead it on its holy path.

SAINT JOHN NEUMANN TOMORROW (THE NEXT TEN YEARS)

PHASE I: NEEDS ASSESSMENT

During Phase I, LRPC assessed four areas of impact to determine the long-long term needs of the Parish – Demographics, Program Needs, Facilities and Financial.

Demographics Assessment⁴

The LRPC analyzes and projects the current and future demographic composition of the Parish. Projections, when applicable, include local economic assumptions, government initiatives, including impacts from township and/or county initiatives that could affect Parish growth, and Parish data. Parish data analyzes Parish growth, considering such factors as Mass attendance, distribution of Parish households across the Parish boundaries, and number of parishioners gained or lost over the years. The LRPC also considers, as applicable, experiences of other local Churches when developing demographic projections. The outcomes of the LRPC's assessment of Demographics for 2010 - 2020 follow:

Population Trends. SJN Parish comprises the majority of eastern Delaware County and includes the municipalities of Sunbury, Galena, and a portion of Centerburg. In addition, the Parish includes all or a portion of the Townships of Kingston, Porter, Trenton, Berkshire, Orange, Brown, Berlin, Genoa and Harlem.

Significant population growth has characterized Delaware County over the past two decades. According to the 2000 Census, Delaware County experienced population growth of 64% between 1990 and 2000. Projected growth for 2001 to 2010 is 49%, while growth from 2011 to 2020 is projected at 25%.

Delaware County's growth rate also has been significant relative to surrounding areas. Between 1990 and 2000 Delaware County's average annual growth rate of 5% is more than double that of any other central Ohio county, and is almost four times greater than the central Ohio growth rate (1%) for the same period. The growth rate for Ohio from 1990 - 2000 was .05%, while the U.S. growth rate was 1.2%.

Building Trends. In order to better understand community growth, the Committee looked at residential building permits obtained. Delaware County experienced continuous and significant annual growth in building permit totals from the early 1990s through 2003/2004. Building permits obtained in 1999 (3,621) and in 2003 (3,411) were more than four times the number of building permits obtained prior to 1993.

Building permits and associated development in Delaware County has decreased since 2003. In 2004, the number of building permits obtained fell by approximately 12%. Building permit levels decreased an additional 22% in 2005 and 33% in 2006. By calendar year 2007, building permits had fallen from 2003 levels by approximately 60%.

The Committee also analyzed building permits specific to the municipalities and townships within SJN Parish through calendar year 2008. From its peak in 2002 in which 1,599 building permits were obtained, only 295 building permits were obtained in 2008. This represents an 81% overall decline in building permits issued.

Parish Membership Trends. The Committee then analyzed actual Parish membership data for SJN from inception. During the 1980s and 1990s the Parish experienced fairly consistent annual growth, ranging from five families to 22 families per year. Average annual growth between 1981 and 1999 was 12.4

⁴ Supporting data and documentation relating to Demographics can be found in Appendix I.

families. The Committee hypothesized that this rather dramatic growth rate was due to the opening of the original Church.

In 2005 the current Church facility was fully functioning. As seen in Table 1, Parish growth has continued, outpacing any growth noted in the population or building trend data.

TABLE 1

<u>Year</u>	<u>Net New Families</u>	<u>Total Families Yearend</u>	<u>Annual Growth</u>
2004	NA	430	NA
2005	105	535	24.42%
2006	107	642	20.00%
2007	98	740	15.26%
2008	122	862	16.49%
2009	108	970	12.53%
Compound annual growth rate 5 years ending 12/31/09 = 22.47%			

The Committee examined Parish growth by post office address, noting significant growth in the southern areas of the Parish, and the most significant growth in Sunbury, Galena and Westerville. From 2001 to 2004, 17 new Westerville families became members of SJN Parish. From 2005 to 2008, 87 new families joined SJN Parish from Westerville. Westerville’s contribution to average annual growth from 2000 to 2004 was 9%. Its contribution to average annual growth from 2005 to 2008 was 19.6%. For 2000 to 2004, aggregate growth for all relevant postal areas was 84%, with average annual growth of 17%. Similar increases were found in Lewis Center, where annual growth was 6.09% from 2000 to 2004, and 15.58% from 2005 to 2008.

The Committee also looked at where growth was occurring within its Parish area and surrounding areas. Parish membership is widely distributed over the eastern portion of Delaware County. Notably, a significant percentage of parishioners reside outside of the current Parish boundaries.

The Committee also contrasted growth at SJN with other Parishes in the general area; including, St. Mary’s Parish in Delaware, St. Paul’s in Westerville, and Church of the Resurrection in New Albany. For 2004 – 2007, SJN’s consistent growth rate generally exceeded the growth rates of neighboring Churches.

Conclusions. Although the Committee could not definitively explain significant growth in areas outside the current Parish boundaries, it set forth some defensible hypotheses⁵. The availability of the new Church facility in 2005 likely contributed to sustained Parish growth during a period in which building permits and new home construction declined. Additionally, overcrowding or lack of adequate facilities in neighboring Parishes may have affected the decisions of families to join SJN Parish. In addition to location and facilities, a recent parishioner survey also cites the Parish’s sense of community, the high caliber religious staff, adult and child program offerings, and the music program as significant factors affecting membership decisions.

Based upon continued Parish growth from 2005 – 2009, a period in which population rates and building permit issuances have significantly decreased, the Committee concludes that current Parish growth rates

⁵ These hypotheses should be validated from time to time to ensure they remain defensible.

will continue into the future. The Committee projects the most likely growth scenario for SJN to be 105 families per year from 2010 - 2020. A worst case (lowest) growth scenario would be 75 families per year, and a best case (highest) scenario would be 125 families per year for this period.

Updating Demographic Forecasts. Review of historical Mass attendance and registration data suggests that registration trends slow when Church facilities become overcrowded. Overcrowding is defined as the point at which Mass attendance exceeds building capacity. Overcrowding occurred in 2004, just prior to completion of the new Church. The Committee believes that Parish growth rates will diminish when the current Church facility becomes overcrowded. Based upon the projected growth rate of 105 families per year, overcrowding will occur in calendar year 2015. Using the worst case (lowest) estimate, overcrowding will occur in calendar year 2016. Under the best case (highest) growth estimate, overcrowding will occur in calendar year 2014. The addition of a Sunday Mass could extend these dates by up to three years (2018).

The LRPC recommends that Parish growth rates and Mass attendance be monitored regularly, and if necessary growth rates should be re-forecasted in order to maintain the integrity of the Master Plan.

Program Assessment⁶

The LRPC is responsible for assessing the needs of parishioners and Parish programs. In fulfilling that role the committee determines the appropriate collection method, creates the format, schedules forums, administers collection of data, compiles data, and analyses and interprets data. Important items of consideration by the committee include: 1) who to survey (Parish staff, ministry leaders, and parishioners); 2) collection methods (interviews, focus groups, and questionnaires); and 3) analysis and interpretation (trends or anomalies). Following is a summary of the program needs assessment:

Data Collection. In the fall of 2008, the LRPC began its task of identifying the needs and opinions of SJN parishioners on future priorities for the Parish. Interviews, focus groups and a full Parish survey were selected as the means to collect parishioner input. The interviews and focus groups were used to identify areas of interest upon which additional data would be gathered through a full Parish survey.

A plan was prepared for the interviews and focus groups that consisted of:

- specific parishioners to be interviewed and ministries for focus groups;
- questions for both interviews and focus groups; and
- guidelines for conducting the interviews or focus groups.

For the interviews, parishioners were invited based on their involvement and/or length of time with the Parish. Larger Parish ministry groups were offered a focus group session at one of their scheduled meetings; focus groups were also conducted for other ministry groups as requested. In addition, two focus group sessions were open to all parishioners. The questions covered ministries (what might increase participation, what ministries could be added) and facilities (what are known needs and what might make the ministries more effective).

Parish volunteers with experience in interviewing and group facilitation conducted interviews and focus groups beginning in November 2008 through January 2009.

As the interviews or focus groups were conducted, responses were provided to an individual responsible for recording and summarizing the data. Common themes, based on the frequency of a particular response, were summarized.

⁶ Supporting data and documentation relating to Programs can be found in Appendix II.

Survey development began in February 2009, and was completed in April. Survey questions were developed from the interview/focus group data as well as questions submitted from others on the LRPC. Drafts of the survey were reviewed, assessed, and re-written to ensure the questions for the final survey were constructed to yield meaningful responses. The survey was designed for one response per household.

The survey was administered using the Survey Monkey⁷ tool via the Internet and offered on paper to those who did not have Internet access. The survey period was originally planned for three weeks, but was extended in an effort to increase the response rate. The survey period began on April 19 and ended on May 17, 2009. At the end of the survey period, 30% of the SJN parishioner households responded to the survey. The Committee determined that a true cross section of the Parish had completed the survey, thus ensuring that the sample results could be generalized to the entire Parish population. The LRPC reviewed the responses, which prioritized the facility needs, identified a new Social Hall as the most pressing priority, and characterized the willingness of the Parish to financially support a future construction project.

Communication. The purpose of the LRPC and its actions were communicated to parishioners regularly beginning in November 2008. Initial communication included an explanation of the LRPC by Father David Sizemore at all Masses. That message was reinforced the same weekend through a bulletin insert that named committee members and outlined the functions of the needs assessment teams.

Later communication followed approximately every three months through a bulletin insert. Often, when a particular milestone(s) was reached, a Committee member would summarize the committee's progress at the end of each Mass. It was common to have a bulletin insert on these same weekends. As appropriate, reminders for interview/focus group participation or survey availability were posted in the bulletin.

Bulletin inserts provided progress reports for each assessment team, and invited comments to a Committee member, listing the names and contact information of committee members. A bulletin insert also was used to share the results of the Parish survey.

Updating Program Assessments. The LRPC recommends that a new program assessment be performed at least every three to four years, and prior to consideration of any significant change to the Parish's physical plant. The scope of the assessment, and the manner in which it is conducted will depend upon the nature of the project.

Facilities Assessment⁸

The LRPC is responsible for thoroughly understanding the physical layout of the Parish campus, including land availability, spatial relationships, utilities, and other significant building/development factors. With information provided by the Demographics, Program Needs, Finance, and Facility assessments, the LRPC is responsible for determining the appropriate facility response to the needs of the Parish community both now and in the future, within the financial boundaries identified. In doing so, the Committee visited various Churches and/or social halls with similar needs to obtain additional information regarding costs, layout, ideas, etc. Result of the Facilities Assessment follow:

The LRPC initially studied the SJN Campus by distributing and describing the components of an aerial map of the SJN property, including the layout of existing structures, parking lots, fields, and utilities.

⁷ Survey Monkey is a survey/questionnaire tool for creating and publishing custom surveys in minutes, and then viewing results graphically and in real time. See www.surveymonkey.com.

⁸ Supporting data and documentation relating to Facilities can be found in Appendix III.

The Committee then focused on learning which Parish groups were using the facilities, how they were being utilized, and how often. The Parish facility schedule was used as a reference to help focus on the primary users, and to gain a preliminary sense of frequency of use. Members of the Committee met with and surveyed every major committee, ministry, prayer group, and program at SJN to understand where they were meeting and if those meetings were on the SJN property. The Committee determined that many of these activities were taking place off campus due to space limitations. Information obtained from this survey helped in the formation of the Parish-wide Needs Assessment Survey conducted in 2009.

At the request of the LRPC, in the fall of 2009, greeters at all SJN weekend Masses counted attendance every weekend for three straight months. These counts helped the Committee obtain reliable information about the utilization of the Church and parking lots.

One outcome of the Needs Assessment Survey was that parishioners placed a high priority on building a new Parish Center (including classrooms, meeting rooms, Parish office space, and a social hall with updated kitchen facilities). With that priority in mind, the Committee organized visits to other Churches and Parishes that had recently built similar structures to discuss their building processes and understand constraints or issues encountered in their planning and building process. Five projects were identified that had many of the same needs identified in the SJN Needs Assessment Survey. Members toured projects at St. Elizabeth (Columbus), Resurrection (New Albany), St. Joan of Arc (Powell), Vineyard (Sunbury), and St. Joseph (Dover). For these site tours, the LRPC drafted a questionnaire to help facilitate discussions and ensure coverage of key points with project representatives. In most cases the Priest or Minister, and a few key personnel involved in the building process, were present for the tours. From these visits the Committee was able to formulate positives and negatives of each project. The tours were valuable learning processes, yielding excellent information not only pertaining to the building processes, but also about what/what not to incorporate into SJN's new Parish Center.

Subsequent to the project tours LRPC members met again individually with all major Parish groups (including Parish staff, PSR, EDGE, Youth Group, Women's Club, Men's Club, Flea Market, St. Vincent De Paul, Knights of Columbus, Adult Education and Choir) to determine their future space needs based upon the LRPC's projection of Parish growth for 2010 – 2020. Each group was asked to contrast its current space needs with what they felt their needs would be in the future.

Updating the Facilities Assessment. The LRPC recommends updating the facilities assessment any time a demographic assessment or program needs assessment suggests the addition of, or significant modification to Parish facilities.

Financial Assessment⁹

Income projections contained in the SJN 10-Year Pro Forma (See Table 2) are conservative estimates due to the current economic climate. While the Holy Spirit continues to bless SJN by increasing the number of registered families participating in the offertory on a regular basis, those involved with Parish finances believe it is their obligation to manage the Church's finances with constraint.

Projections in the expense portion of the Pro Forma are based on past trends coupled with realistic increases that take into account growth in our current ministries and ample room for growth within these same ministries.

⁹ Supporting data and documentation relating to Financial Assessment can be found in Appendix IV.

In summation, the SJN 10-Year Pro Forma is an integral part of our financial planning and control. It is used as a decision-making tool when constructing an annual budget, developing long range plans, and choosing capital expenditures. The Pro Forma indicates SJN is on solid financial ground and will continue to provide for the Faith Community in an acceptable manner.

However, it is also apparent that the projections do not provide the additional resources needed to build a Parish Center and return the Parish Offices and PSR to the SJN Campus. It is based upon these projections that the decision to conduct a Capital Campaign was reached.

TABLE 2

10 YEAR PROFORMA										
	1	2	3	4	5	6	7	8	9	10
	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019
OFFERTORY	672,245	699,807	733,398	752,466	771,278	810,613	843,848	867,476	887,428	909,613
OTHER-PARISH INCOME	6,500	6,500	6,500	6,500	6,000	16,500	16,500	16,500	16,500	16,500
FEES, OTHER RELIGIOUS EDUCATION	28,620	29,479	30,363	31,274	32,212	33,178	34,174	35,199	36,255	37,344
TOTAL INCOME	707,365	735,786	770,261	790,240	809,490	860,291	894,522	919,175	940,183	963,457
MINISTRY SUPPORT	186,013	197,733	218,517	222,743	227,055	251,327	269,580	278,090	282,192	287,388
RENTS, BENEFITS & INSURANCE	74,755	78,493	82,417	86,538	90,865	95,408	100,179	105,188	110,447	115,937
MINISTRY SUPPLY & EXPENSE	125,015	130,265	131,568	132,883	134,212	138,239	142,386	146,657	151,057	155,588
UTILITIES	36,600	38,430	40,352	42,369	44,488	47,602	50,934	54,499	58,314	62,399
REPAIR & MAINTENANCE EXPENSE	22,260	21,786	21,786	23,000	23,000	0	0	0	0	0
OTHER EXPENSE	15,400	15,554	15,710	15,867	16,025	16,186	16,347	16,511	16,676	16,844
INTEREST EXPENSE	54,200	54,200	54,200	54,200	54,200	54,200	54,200	54,200	54,200	54,200
DIOCESAN ASSESSMENT	33,304	33,937	35,315	36,995	37,948	38,864	41,356	43,017	44,199	45,199
RELIGIOUS EDUCATION	88,194	89,958	91,757	93,592	95,464	97,373	99,321	101,307	103,333	105,400
SECONDARY & INTER-PAROCHIAL SCHOOL SUPPORT	50,421	52,942	55,589	58,369	61,287	64,351	67,569	70,947	74,495	78,222
TOTAL EXPENSE	686,162	713,298	747,211	766,556	784,545	803,550	841,871	870,417	894,913	921,159
NET ORDINARY INCOME	21,203	22,488	23,050	23,684	24,945	56,742	52,651	48,758	45,270	42,298
MAINTENANCE RESERVE	20,703	21,738	22,825	23,510	24,685	25,920	27,216	28,576	30,005	31,500
NET INCOME	500	750	225	174	260	30,822	25,435	20,181	15,264	10,798

Following is a line by line explanation of the Pro Forma:

Offertory. Offertory is based on an average increase of 4% per year. This is under the actual increase generated over the past four years. However, based on an uncertain economy it was felt we should maintain a conservative approach in our estimates of the offertory.

Other Parish Income. Income in the first four years is based on the trends for the last four years. An increase is anticipated in year five based on revenue generated by the new Parish Center. It is important to note that this income will off set the increase in maintenance and utilities generated by the Parish Center, classrooms and offices.

Fees – Other Religious Education. An increase of 3% per year is anticipated based on growth of the Parish.

Ministry Support. As the Parish grows in size it will be necessary to add additional staff to address growing ministries and administrative needs. In year 2011 we will add a part time Marriage Enrichment Director. In 2015 we will add a part time maintenance and custodial positions. The following year, 2016, we will add a

full time Religious Education Administrative Assistant. As the work load increases throughout the life of the Pro Forma hours will be added to the existing Ministry Support Team.

Ministry Supply and Expense. A modest 1% increase is budgeted until 2015 at which time we will increase this line by 3%. This increase is based on additional ministries and Parish growth.

Utilities. A 5% yearly increase is projected based on current trends. In 2015 a 7% increase will be used based on the addition of a Parish Center, classrooms, and offices.

Lease Expense. The lease expense for offsite Parish Offices will cease with the opening of the new offices on the Parish Campus.

Other Expense. A 1% increase is projected based on past trends.

Diocesan Assessment. An assessment of 5% on Offertory and other Parish Income is applied by the Columbus Diocese. An increase in this assessment is not anticipated.

Religious Education. The cost of our Religious Education Programs is expected to increase by 2% each year based on projected Parish growth.

Secondary and Inter-Parochial School Support. An increase of 5% is budgeted based on past trends and future Parish growth.

Maintenance Reserve. Each year we set aside money for unexpected maintenance issues. If this money is not used it is moved to a Maintenance Reserve Fund managed by the Columbus Diocese. This allows us to become prepared to address larger maintenance issues that may occur as the Church buildings begin to age. A 5% increase has been budgeted for this line.

Updating the Financial Assessment. Parish Staff, along with the Parish Finance Committee, monitor the Parish's financial condition on an ongoing basis, and continually update long-term and short-term financial projections. A financial assessment will be a significant component of any future building project.

Phase II: Feasibility

During Phase II, the feasibility phase, LRPC developed concepts from the needs assessments described above, then hired an architect to translate those concepts into building designs and costs. With the help of a feasibility consultant hired by SJN, the Committee assessed whether financial support for those concepts would exist within the Parish.

Construction Planning¹⁰

The LRPC is responsible for selecting architects and contractors for the design and construction of new or modified Parish facilities. LRPC members involved with this aspect work very closely with those involved in the Facilities assessment. This team is responsible for issuing RFPs to architects and contractors, and leading the selection process, while regularly reporting to the Pastor, the LRPC, and the Parish. This team also remains involved and active through Phases II and III of the planning process, as further described below. The outcome of these efforts to date are presented in the following paragraphs:

Through demographic, program, and facilities assessments, the LRPC determined that the Parish needed a new Parish Center to provide room for social gatherings, classrooms, meeting space, and Parish offices. The Construction team was charged with programming and overseeing the architectural and construction processes for the Parish Center. The “program” incorporates Parish growth projections and needs data collected in previous steps. The program states exactly what, where and how many of the needs will be incorporated into the new Parish Center. In summary, the Parish Center needs to house staff offices, PSR, and EDGE, and provide space for Parish group meetings and large gatherings.

After developing the program, the Committee prepared an RFP with a Proposal Format for architectural firms. A list of approved architects was provided by the Catholic Diocese of Columbus, along with the General Contractor List. The eight architects on the Diocesan list, along with two additional firms, were invited to the pre-proposal meeting, and eight of the ten architectural firms attended the meeting. At the pre-proposal meeting the Parish center concept was discussed in great detail, and prints of the existing facility were distributed, along with the RFP and Proposal Format. Participants were given a tour of existing facilities. Proposals, which were due three weeks after the pre-proposal meeting, were submitted by five of the eight firms.

Four of the five architectural firms were invited for further interviews, after which one firm was selected – Meacham & Apel. Meacham & Apel performed the programming portion of the contract, which is an elevation drawing of the proposed new Parish Center, a layout of the interior of the building and a plot plan of the site showing where the new building would be located. After approval of these plans Meacham & Apel developed a detailed estimate breakout of the Parish Center, parking and sitework, and renovation of the existing social hall to convert the upstairs into Parish offices.

Fund Raising

Prior to finalizing building plans and launching a capital campaign, the Committee needed to determine what the Parish could afford to build; a feasibility study was necessary. To ensure professionalism, accuracy and objectivity in the feasibility process, an RFP was issued to hire a fund-raising consultant to perform a feasibility study for the proposed Parish Center. Eight consultants responded to the RFP, and based upon their proposals three firms were selected for interviews by a representative Parish group. The Cunneen Company, of Hamden, CT, was selected; a Cincinnati-based regional director was assigned to SJN.

¹⁰ Supporting data and documentation relating to Construction Planning can be found in Appendix V.

The feasibility study initially involved interviewing a large group of major donors and active group leaders of the Parish to determine anticipated levels of monetary giving for the capital campaign, and degrees of voluntarism (Parishioners would provide assistance for the campaign). Cunneen interviewed 86 Parish families in this phase of the study and conducted an in-pew survey with 312 additional families responding. The study also queried Parishioners (via interviews or in-pew surveys) about their general perceptions and attitudes regarding the Parish, staff, programs, ministries, and other aspects of SJN, and a variety of other possible concerns that could affect the proposed building project.

Cunneen conducted this extensive study to 1) Evaluate the support of parishioners to build a new parish center with classroom space and to renovate the existing Social Hall into office space, 2) Evaluate parishioner opinions about the overall performance of various parish programs, 3) Determine the potential financial support for this project, and 4) Identify potential campaign volunteers.

Overall, 96% of those interviewed and 86% of those responding to the in-pew survey felt the parish was either “excellent” or “very good” in its ability to meet the needs of parishioners.

Some particular highlights from the study:

- Father Sizemore received exceptional ratings for his pastoral leadership. His ratings are among the highest ever received by the Cunneen Company in feasibility studies across the nation.
- The music ministry, spiritual life, community outreach, social programs, parish staff, the youth ministry and the religious education programs all received very high marks from respondents. The Youth Ministry PSR Directors received many favorable comments for their efforts. Across the country, these are two areas that normally are rated much lower, so these are particularly noteworthy.
- The parish's Long Range Planning Committee accurately perceived the needs of the parish; over 80% of those responding to the study found the case as presented to be important or essential. This means there was a clear desire to see the parish move forward to build the space necessary to house both the PSR classes, host parish meetings, expand social space and re-locate the offices back on campus.
- Although there was some concern about the current economy, about 90% of those interviewed and over 70% of those surveyed said a campaign to raise the necessary funds should be launched. Many of those came with the caveat that the parish should first retire the existing debt – the Parish is already committed to doing before starting a campaign in January 2011.
- 65% of those interviewed said they would volunteer in a Capital Campaign. Combined with 51 other suggested names that emerged from the study and 43 more names volunteered from the survey, the Parish likely will have a very strong group of volunteers for a subsequent capital campaign. Cunneen noted that high volunteer turnout is the best predictor of overall campaign success.
- 81% of those interviewed said they would support the campaign; of these most offered either a gift or a gift range.

Given the strong responses to the feasibility study, the Cunneen Company recommended that the parish move forward with a major capital campaign, expecting to raise between \$2,800,000 to \$3,000,000 in a properly-directed program.

After reviewing and analyzing information obtained from the interviews and in-pew survey, Cunneen met with Parish leaders, outlining their financial projections, and making recommendations for carrying out a successful campaign.

Based upon Cunneen’s survey results and financial projections, the LRPC met with Meacham & Apel to make necessary adjustments to the Construction Plans.

On the weekend of Pentecost Sunday, 2010, LRPC members presented Cunneen’s findings at each of the weekend Masses, and held “Town Meetings” with parishioners after each Mass in the Social Hall. At the

Town Meetings parishioners had the opportunity to provide input on the conceptual designs of the Parish Center and Social Hall renovation, as well as comment on the planned construction process.

PHASE III: PRE-CONSTRUCTION

Phase III primarily takes place after the completion of the Master Plan, and thus, this section addresses what should be expected during Phase III of the planning/building process. Phase III is a multi-year process, involving a capital campaign to raise funds to build the Parish Center, and a Construction process to bring the Parish Center to fruition.

This section of the Master Plan will be updated periodically to incorporate some of the work and processes undertaken during Phase III. This will help provide further documentation of the process for future use.

Capital Campaign

A Capital Campaign Committee is being established in the Parish to coordinate and implement the fund-raising drive necessary to raise capital for construction of the Parish Center. Volunteers identified during the feasibility study will assist the Campaign Committee. Diocesan rules currently require 100% of the total construction cost to be pledged, and 50% collected before construction can begin. After the initial 50% is collected, the Diocese of Columbus will extend the Parish a “bridge” loan for the other 50% so the Parish can commence and complete construction before the remaining pledged funds are fully collected. Once construction commences the Parish will continue to collect from parishioners the remaining 50% pledged in order to repay the Diocesan loan. Debt reduction is expected to take place over the course of five years.

Construction

Once the initial 50% of building costs is obtained construction will commence on the Parish Center. Construction is estimated to take 12 months for completion. Construction will be phased as follows:

1. **Parking and Site Work**– Parking will be addressed first by adding one hundred and six (106) new spaces in a temporary construction condition due to the fact that forty (40) of the original spaces will be lost because of the location of the Parish Center. Site utilities will also be addressed in this phase of work.
2. **Parish Center** – The construction of the Parish Center will overlap the site work of Phase One and will consist of the construction of a 17,100 square foot stand alone building. A basement will be dug consisting of 8,550 sf which will house the classrooms and the mechanical room. The first floor will also be 8,550 sf which is where the new kitchen will be located and the open social area. This building will also include an elevator.
3. **Renovation of Social Hall into Parish Offices** – The renovation of the existing social hall will be the final phase and will not commence until the Parish Center is complete and it is able to be occupied. Once social activities can take place in the new Parish Center the first floor of the existing Social Hall will be renovated into the new Parish offices. The basement of the Social Hall will be demolished to the exterior walls and will be updated with new finishes.

The Master Plan will be updated to include information about the actual construction process as that phase gets underway in the future.

TENTATIVE IMPLEMENTATION TIMELINE

As of the date of this writing, the Implementation Timeline for completing the Parish Center and Renovating the Social Hall for Parish offices tentatively is as follows:

Spring/Summer 2010

- SJN Parish Center building plans finalized with Meacham & Apel Architects

Fall 2010

- “Silent” fundraising events begin

January – June 2011

- SJN Parish Center capital campaign launches
- SJN parishioner pledges registered

January 2011 – December 2015

- Phase I project pledge collection period
- Presentation of capital campaign to new SJN parishioners

Spring 2013

- Groundbreaking for Phase I project - SJN Parish Center

Spring/Summer 2014

- SJN Parish Center opens
- Begin renovation of SJN social hall into Parish offices

Fall 2014

- Occupy new SJN Parish office building

January 2018

- Begin Phase II project – SJN church expansion