

St. James Day of Discovery

Questions & Answers Sessions

When & Where:

Shelton Hall

Thursday, June 26 @ 6:00 P.M.

Monday, July 14 @ 6:00 P.M.

A deeper dive into the Generis Discovery
Efforts: Evaluating St. James' ability to
undertake a capital campaign to fund and build
a new Church

Amended and Updated Including the July 14 Q&A Session

St. James Day of Discovery

As the Parishioners of St. James Catholic Church have been made aware, the Church has requested a feasibility study to assist in determining if our Parish is in favor of and committed to willingly support a new Church building. We are excited about what is possible here at St. James and what a new Church would mean to our Catholic Community and the place we call home.

Before we can move forward, the Parish must gauge the overall support of our Parishioners. This support needs to be in two forms, financial and a willingness to answer the call to volunteer. In order for such a large project as a new church building to be successful, both of these are a must. When we speak in terms of a financial willingness, this means as Parishioners we will contribute to a capital campaign commitment and a spirit of ongoing tithing to support the added expenses the new Church would bring over and above our normal ministries we support today. When we reference volunteering, we will need many of our fellow Parishioners, working in unison, to commit to chairing/co-chairing/serving on the many committees and subcommittees necessary to make this happen.

To help all understand the work that has gotten us to this point, the Church published a Summary entitled “St James Day of Discovery – a Summary Report from Generis Consulting Group”. This summary report was provided to our Parishioners at the masses the weekend of May 31st/June 1st in both English and Spanish. As Church leadership recognized there would be more questions than answers a mere summary report would provide, we also announced two Question-and-Answer (Q&A) dates – June 26th and July 14th. The goal of these Q&A sessions is to allow our Parishioners to ask questions and understand more about the possibility of a new Church.

On behalf of St. James Catholic Church: Father Tim, Katie Daniels (Pastoral Council Chair), Rhonda Swita (Site Use Plan Team Chair), Raquel Thompson (Hispanic Community, Karina Escobedo (Hispanic Community) and Mark Williams, (Finance Council Chair Emeritus), we welcome each of you as engaged Parishioners to these Q&A Sessions. We hope tonight we can educate and answer any questions or concerns that you might have with a stated goal of providing all the clarity we can for this project.

In an attempt to make the most of our time together tonight, we have prepared some Q&As ahead of tonight’s meeting. We will begin tonight with reviewing these prepared Questions-and-Answers. At any time, please feel free to ask questions as we go or hold your questions to the end. Any questions that we did not anticipate will be added to the existing Q & A. The final version will be published on the Church’s website following the 2 sessions.

Questions and Answers – Why a New Church

Q1: When and why did the Parish start to contemplate the need for a new Church?

A1: The discussion of how to take advantage of the current buildings and campus space has been a topic of conversation for many years. In late 2021 and early 2022, Father Tim created the Site Use and Planning Team (SUPT), to study a Master Campus Plan. The SUPT is composed of seven members of the Parish. After many months of work, the final report contained several possibilities that included eight potential projects. These projects ranged from constructing new buildings to the remodeling/repurposing of existing facilities and providing additional parking. The SUPT presented an initial report to the Finance Council in June 2022. As the negative impact of the Pandemic was still being felt and our financial capacity was uncertain, the Finance Council suggested that this be tabled at that time.

In May of 2024, the SUPT requested permission to restart its efforts. The SUPT spent the next several months reviewing its previous efforts, talking with staff and making adjustments it deemed necessary. This group presented its recommendations to the Finance Council and the Pastoral Council in late 3rd Quarter of 2024. Prioritizing their future growth projects for our campus, the SUPT recommended the number one priority is the building of a new Church. With the growth in our Parish, both the Finance Council and the Pastoral Council agreed to gauge the readiness and commitment of the Parish to consider a new Church. Due to are our blessed growth, which includes many young adults and families, the Parish will continue to experience pressure on the need for a larger Church. As many Parishioners know, the Sunday 9:00 AM and 12:00 PM masses are standing room only with 82% of these masses exceeding capacity!

Q2: Since the Parish is asking us to consider funding a new church, when will we know what will be included in the Church?

A2: When the SUPT determined the priority should be a new Church, it went to work on what should be included and thought big. Current visions on what would be included in a new Church include but are not limited to the following: Bridal Room, Choir Loft with storage, Confessionals that offer better privacy, Cry Room sufficient for the growing young families in our Parish, Multi-Purpose room, Restrooms, Sanctuary space sufficient to hold all masses, Storage, and Vestibule for gatherings before and after mass.

As part of our feasibility study that you will hear about tonight, a Building Committee will be formed to undertake working with Architects and the like to design and determine the exact size/scope of the new Church. Several members of the SUPT will transition to this committee along with other Parish members joining this committee.

Q3: When the SUPT made the recommendation for a new Church, did it offer any cost assumptions?

A3: The SUPT did provide an early cost estimate and as one would expect this will be a multi-million-dollar capital campaign that could be in excess of \$10 million dollars. As no formal plans were drawn, it would be premature to rely on that estimate as it could be too low or too high. Once this price tag becomes clear, this will be shared with the Parish. The Building Committee will also employ what is referred to as “value engineering”. What this means is the project will include every possible need, but the final project would be dependent on what our Parishioners are willing to financially support. If the feasibility study supports a capital campaign with said campaign coming up short of what the total cost would be, then this committee will have to make hard choices on what has to be engineered out of the project – hence the term value engineering.

Questions and Answers – Why did the Church hire a 3rd Party Consultant

Q4: There are those at St. James that have fundraising experience in his/her background, why did the Church hire a 3rd party Consultant and not rely on members of the Church?

A4: Church leadership, in this case Father Tim, The Finance Council, The Pastoral Council, and SUPT knew that this would be a large undertaking. Of the current members, none of them possessed professional fundraising experience in his/her background nor do they have available time. Members of the aforementioned councils may have served on capital campaigns before, but none have ever led one, especially one of this magnitude. Additionally, this group felt a third-party professional eye would offer an experienced and objective view of the current giving and feasibility to advise us accordingly. When it comes to fundraising, we will look to our fellow parishioners for talent and commitment to join a Fundraising Committee.

There are two entities, Churches and Schools, that typically utilize and rely on the employment of a 3rd party to guide and assist them in a feasibility study and capital campaign. The reason for this is that the success rate is typically higher when a Church or School seeks outside assistance vs. those that do not. Expertise and seasoned advice will be a big driver in St. James’ ability to be successful in our efforts. As an FYI, when St. James built Shelton Hall, the Parish also sought the guidance of an outside Consulting firm.

Q5: Who determined and what was the process of selecting the Consultant?

A5: The SUPT did some preliminary research of few Consulting firms. A member of the Finance Council introduced a couple more for the SUPT's consideration. The SUPT narrowed it down to two potential Consultants. From there, the following Parishioners interviewed the final two: Rhonda Swita, Robin Haire, Katie Daniels, Alex Emplainscourt, Karina Escobedo and Mark Williams. Father Tim and Meg Gibens participated as well.

In terms of the process, the two Consultants requested base information about our Parish. From here, we provided them with prepared questions, and each was provided a one-hour time slot on January 16th of this year to make their pitch on why them. Follow-up questions were submitted by the members. As those mentioned above were authorized by their respective councils to make a decision, Generis emerged as the Consultant of choice to assist St. James.

Q6: How did Generis emerge as the Consultant that was selected?

A6: The small group referenced above actually felt good about either of the final two potential Consultants. With this said, each member voiced his/her thoughts on what stood out to them. In the end, it was Generis' professionalism, approach in assisting with a feasibility study and campaign best practice tips. This includes understanding a Parish's generosity capacity, Generis track record of success including Catholic Churches, and efforts working with an ever-growing Hispanic Community.

Q7: Generis held a Day of Discovery with some members of the Parish. Why did I not get invited to that meeting? Since the Parish will go through a feasibility study and potential Capital Campaign, how will my voice be heard?

A7: Generis has done this exercise many times. At their recommendation, the following groups/people were asked to attend - Church Staff, SUPT members, current members of the Finance and Pastoral Council, former Council chairs and some volunteers that are active in the Church.

Going forward, as we enter the feasibility study, every adult member at St. James will get the opportunity to participate in the process. As you can imagine, with over 850 family units, it would be impossible for all to have his/her voice heard in the same manner. Some will get the opportunity for in person meetings, some by video conference and others by survey. Rest assured all who want to participate will be included.

Q8: Did Generis complete a written report for the Church?

A8: Yes. Generis provided a 25-page report containing an Introduction (when they were formally engaged and scope of the exercise – 2 pages), Findings (what Generis heard and understood – 3 pages), Giving Pulse Report (review of tithing for the past two fiscal

years + current fiscal year of our Parish – 2 pages), Readiness & Next Steps (how to prepare for a feasibility study and capital campaign – 7 pages) and Closing remarks (expression of thanks – 1 page). The remaining 9 pages included cover page, table of contents and header pages.

Father Tim, Rhonda Swita, Katie Daniels, Raquel Thompson and Mark Williams followed up with the Generis team with further questions to ensure clarity and understanding prior to forwarding the report to the members of SUPT, Finance Council and Pastoral Council. This ensured these members could fully explain the report when it was released to their respective councils. In total that is Father Tim and 27 of your fellow Parishioners that have reviewed the full Generis report.

Q9: Will I as a Parishioner get to read the entire Generis report?

A9: No. Any Consultant advises the client against this, as the entire organization will not have the full context of all the conversations and understanding of nuances in the report. This would lead to misinterpretation by these readers. This is a normal pattern and practice that also exists in most Fundraising and Capital Campaigns.

Please understand, by no means is this an attempt and we trust that you would not deem this to mean the Parish is being “secretive” or “hiding” facts. Rather information contained in any consultant report is meant for leadership use in order to make the best decisions possible going forward. Some information contained in the report, without adding the context of talking with Generis (which was mentioned in our previous answer) could actually be misunderstood and cause unintended consequences simply because the reader may not have understood the complete story.

Q10: Since the Parish will not receive the entirety of the Generis report, how as a Parishioner am I supposed to get comfortable if I cannot read the report? Will you provide what were the opportunities or cautions in the report?

A10: The simple answer is to place trust and faith in your Pastor and your fellow Parishioners. As stated, there have been 27 of your fellow Parishioners that did review the written report and hear the thoughts from Generis. These Parishioners are active Catholics just like yourself with diverse backgrounds, education, race and ethnicity. Said another way, they are you. None of these Parishioners, with the exception of two, are paid by the Church. The two things that each of these Parishioners all share in common are their volunteer service, and their deep love for our Catholic faith and Parish family.

In terms of Opportunities and Cautions found in the Generis report, we are happy to share with each of you the following:

Opportunities:

- *St James continues to be a thriving center of the Catholic faith and community in Tupelo and the greater surrounding area*
- *The Church is deeply committed to the fabric of the community, as evidenced by its volunteer involvement and financial commitment towards externally focused ministries*
- *The Church continues growth in a multigenerational, multiethnic, and multilingual manner*

Cautions:

- *Maintain the right balance of effort between your multiethnic makeup so that you may continue to serve all of your Parish*
- *Assuming the feasibility study shows support for a new Church, undertaking a Capital Campaign will place “stress” on the existing Church leadership. Resources in terms of people and time will be stretched thin. Church leadership must be aware of this and pivot accordingly. Increased reliance on volunteers to work on certain committees is a must. This will require these committees to be empowered to make decisions, as deemed necessary, and not follow the normal decision-making process that exists in the Parish to date*
- *Current software and processes in place today must be prepped ahead of time to manage a Capital Campaign*
- *The Giving Pulse report showed that the Parish meets its obligations and has a slight income over expense every year in review. However, it is noted that the Parish accomplishes this by reliance on few households supporting 70% of the total giving. Current tithing is at risk of not keeping up with growth and the Parish must improve its generosity culture framework*

Questions and Answers – Readiness Efforts and Next Steps

Q11: What steps did Generis recommend that the Parish must consider to be successful.

A11: Readiness Efforts should be as follows:

- **Donor base Wealth screen:** This enables Churches to understand their potential for donating and giving. Generis confidently and anonymously reviews public records and data sources to assess the ability of parishioners to undertake a capital campaign.

This information is held in the strictest confidence and shared only with the Chairs of the Fundraising Committee.

- Get clear project scope and estimated cost: This will require an investment in time and finances, as the Parish will need to garner the true vision and cost of the new Church
- Begin meeting with Financial Leader Households: Meeting with these Parishioners will best position the Parish for success
- Committees/Volunteers required to support current Church Leadership: As mentioned previously in our Q&As, Church leadership will be challenged to handle normal day-to-day functions and the added feasibility study and Capital Campaign. Start solving now for how this can work and the various Committees that will have to be formed and empowered for success. At a minimum, the Parish will need the following Committees for success: Lead Steering Committee (2-3 individuals with high leadership capacity), Campaign Cabinet (4-6 individual PLUS Lead Steering Committee), Marketing (Print/wed/video size TBD), Building Committee (size TBD) Event planning and volunteer Coordination (size TBD), Kids & Teen ministry leadership (size TBD), and Finance Council (7 individuals)
- Engage key vision casters to promote growth, stewardship, generosity and partnerships. GIVING follows vision!
- All of the above will allow for a complete and robust feasibility study that will position St James to understand the commitment of its Parishioners for a new Church.

Q12: What do we do now and what are the logical next steps?

A12: Start with the Readiness efforts from the previous answer. As those are starting, we will begin a Generosity of Giving as part of your ongoing daily church lives. Generis stands on the ready to assist in this effort. Diocese Communication will be required to get permission to move forward, so start a plan for that effort. Data hygiene to make sure the Parish has the most accurate information to reach and interact with all Parishioners at St. James. Connect the dots on giving so the Parish understands the many ministries the Church supports by devoting a few minutes during mass to discuss these wins. Make sure social media and the Church's website are sharing the remarkable work that is occurring at St. James. In doing so, all members of the Parish will fully understand how their spirit of generosity is impacting the lives of others. Form the Building Committee and start the feasibility study so St. James can *Cast the Vision, Test the Vision, Fund the Vision and Fulfill the Vision*.

Q13: What is the estimated timeline(s) for all of this to occur?

A13: The timeline is starting now with these Q&As. Additionally, these timelines are not necessarily co-dependent on the conclusion of one before another starts. Design Church building and estimate cost (Summer of 2025 - Fall of 2025). Conduct feasibility study to gauge the capacity to give (Fall 2025). Enter a period of generosity coaching to

build a philosophy of generosity, communicate and embrace this as a part of our daily church life (Summer 2025 – Spring 2026). Finally, and *dependent on the results of the feasibility study*, a Capital Campaign that would run for a period of 3-6 months in early 2026 and funded over a three-period ending in 2028.

In terms of a Capital Campaign, this does not mean that we wait until the end of 2028 to know if we are building a new Church. The conclusion of the feasibility study gives us the knowledge whether to proceed and assuming it does, the commitments period noted above will determine the dollars available to support the new Church. The three-year fund period is available as some Parishioners will give all monies up front, while others will provide their commitments over the three-year time span. The Finance Council, as required by the Diocese of Jackson, has the final approval.

Q14: Based on the previous answer, how much up-front money does the Parish have to collect before we can start building?

A14: The goal of any Capital Campaign is to raise 100% of the money needed.

If the Capital Campaign falls short of the final anticipated building cost, the Diocese of Jackson would require St. James to have a minimum 51% of the proposed cost on hand. Any remaining money needed to fund the new Church would come in the form of a loan from the Diocese at an acceptable rate and loan term that must be approved by the Saint James Finance Council

On behalf of us all at St James, we ask that you prayerfully consider your ability to participate both in terms of money and the ability to volunteer for the many critical roles that will be required to make this a reality. Thank you for attending one of the Q&A sessions.

Respectfully submitted

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13 Additional Questions and Answers from the Q&A Sessions:

Q15: What is the cost of hiring an architect?

A15: The Parish has not formally engaged an architect at this point. This will be one of the first things the Design/Building Committee will do. Typical Architect fees are based on a percentage of the total cost of the project and would become a line item in the total building cost. Research has been done to scope in the typical cost of the initial design, which ranges from \$2 - \$5 per sq ft. The Finance Council approved money in the upcoming budget to cover the initial design cost.

Q16: What size church is being considered?

A16: The size and amenities included in the new Church ultimately are dependent on the response of donors. In terms of the Sanctuary itself, the current seating capacity is approximately 275. A new Sanctuary would certainly be large enough to meet the anticipated growth in Parish. Please refer back to Q2 for additional information.

Q17: What was the thought process of not including all church members (or a larger focus group) during the Generis Day of Discovery?

A17: Since this was only a single Day of Discovery, we relied on the advice of Generis on who should be included for this exercise. Please refer back to Q7 for additional information.

Q18: Due to the fact that we are often not meeting our weekly budgetary targets, have we considered setting a more attainable goal?

A18: It is our hope to raise the money required for a new Church. Of course, the feasibility study will help the Parish understand the desire and support of the Parish to move forward. The donor base wealth screen that will be performed will work in building a culture of generosity, we will have a better idea of what type of goal to set.

Q19: Will the funds raised during the capital campaign be retained in their own separate bank account, or will they be co-mingled with the other operating funds of the parish?

A19: There will most definitely be a separate account on deposit with the Diocese of Jackson. A separate accounting of the capital campaign donations and expenses will take place.

Q20: Does the church have a separate Building and Improvement bank account, to fund one-time, unusual, large expenditures (i.e. new AC units, etc.)?

A20: St. James did have a building fund and took special collections for building needs. The Finance Council has taken an approach to retain 10% of its annual budget, maintaining two years of this amount in cash reserves that can help to fund these larger, unusual expenditures. The normal annual operating budget takes into consideration all of the routine building maintenance and repair costs.

Q21: Do we have any contributions to date towards the Capital Campaign Fund?

A21: We have not yet started a formal process for asking for donations. We still have yet to perform the Feasibility Study. However, from our excess cash funds, the Church is in a position to contribute \$400,000 - \$500,000 based on the success of the feasibility study and capital campaign.

Q22: The Hispanic Community is growing quickly at St. James. Were they invited to this meeting? Why are there so few Hispanic people in attendance at this meeting?

A22: We invited all parishioners of St. James to this meeting, including the Hispanic people. The Hispanic community and culture has a different understanding and point-of-view on attending open forum meetings. This was the primary reason for the low attendance.

However leadership from the Hispanic Community indicates that the Community is supportive of the feasibility study and if a Capital Campaign occurs will participate.

Q23: Why not take advantage of the Lakeshire real-estate prices by selling all of the properties (except maybe the rectory), on the west side of Lakeshire, and rebuild those structures on the east side, having one consolidated campus?

A23: The SUPT spent many hours discussing and debating what the final master campus plan should look like. This is a 25 year plan. It includes possible/potential uses for the West side properties.

The bottom line is that we don't have enough room on the East side to house everything, especially to accommodate more parking. More formal architect plans will determine this in the future.

Q24: There's a small group of parishioners that donate the majority of the operational funds to St. James. Do you know their ages? It is important to train the younger generation to step up.

A24: Yes, the Parish has a general understanding of the age of our major donors. We agree that we need to educate the younger generations to give more and give on a regular basis. We have started to work with Generis to develop a Philosophy of Giving to increase our regular offertory donations from those who give so little, and those who do not give at all. This is the first step we will take before starting any other Capital Campaign activity.

Q25: Will we get a break on the Cathedraticum assessment that may be charged on our Capital Campaign contributions?

A25: Let's first define what the Cathedraticum assessment is. It is an assessment of approximately 10% on total annual parish revenues. This applies to every parish and mission in the diocese.

It's paid to the diocese to fund their operational costs. It is our understanding that during a specified time for an approved Capital Campaign, the Diocese has a policy that reduces the Cathedraticum rate.

Q26: Is \$10 Million a firm figure to build a new church?

A26: Absolutely not! That is only a very rough estimate to inform parishioners of a ballpark figure of what it is going to take. There are many factors that will determine the cost. The Design/Building Committee needs to be formed to propose a design and work with the architects to determine all of the cost components. Also, we will incorporate value added engineering as explained in an earlier question. Please refer back to Q3 for additional information.

Q27: Will Generis have a means or recommendations to help us reach "fallen away" Catholics, who may have the means to make a substantial financial contribution?

A27: The Spirit of Generosity program will include contacting and inviting all former members of St. James to return to our Parish.

Q28: If St. James moves forward with building a new Church, will other smaller Churches in the area close?

A28: The diocesan commitment based on the Synod gatherings and Pastoral reimagination process is to maintain and keep the surrounding smaller and missionary churches open. The long-stated vision of this diocese is to have an active Catholic Church in each county.