

**Catholic Diocese of Rockford
Suggested List of Fund Raising Firms
For Parish Capital Campaigns**

Updated January 2009

The following fundraising firms have been interviewed by the staff of the Office of Stewardship Development and have signed the Diocese of Rockford Fund Raising Firm Agreement Form. A copy of the Agreement is attached.

If a parish wishes to work with a firm not listed below, that firm must contact the Office of Stewardship Development and be willing to sign the Fund Raising Agreement Form, before they will be allowed to perform their services and sign a contract.

Contact David Hougan at the Diocesan Administration Building 815-399-4300 when your parish is considering a parish capital campaign.

**American City Bureau
33 West Higgins Rd. Suite 520
South Barrington, IL 60010
(224) 293-3000
john@abc-inc.com**

Mr. John Biggins, Co-Chief Executive Officer, Contact Person

American City Bureau, Inc., the nation's oldest fundraising firm, specializes in capital campaign direction and major gift development. In addition ACB offers a vast array of philanthropic development services tailored to meet your organization's individual culture and needs.

Since ACB's inception over 95 years ago, this family-owned business has conducted its largest segment of work with Catholic organizations of all types and sizes, affording a deep understanding of the unique nuances and special needs involved with campaigns and major gift fundraising within the Catholic realm. Our history, coupled with the personal values of Co-CEOs John Biggins and Leslie Biggins Mollsen, drive our deep commitment to furthering the philanthropic efforts of Catholic organizations—helping each client reach its full promise of financial growth.

Capstone Services Group, Inc.
155 North Michigan Avenue, Suite 739
Chicago, IL 60601
(312) 235-6658
<http://www.csqfundraising.com>
Mr. Brett Skeen, Contact Person

Capstone Services Group is a full-service, Chicago based consulting firm dedicated to servicing the full spectrum of Catholic fundraising needs. Capstone executives have provided counsel to Catholic dioceses, parishes, schools, orders, and organizations. Services offered include feasibility studies, capital and endowment campaign direction, development audits, and appeal design/operation. With an emphasis on Catholic stewardship principles, Capstone works with individual parishes to tailor campaign strategies that fit the unique character of each parish community. Most campaigns employ a multi-redemption period. Available service models include full-time, part-time and consultative engagements. Residential and non-residential options for counsel are available. Capstone consultants, including Mr. Brett Skeen who directed the *United in Faith* campaign, have worked with parishes throughout the Rockford Diocese.

The Church Development Foundation
Chicago Office:
4101 S Michigan Ave, Unit 307
Chicago, IL 60653
(312) 401-2554
Mr. Jeff Susor, Senior Consultant, Contact Person
jeff@tcdf.org

Headquarters:
3 West 63rd Street
Kansas City, MO 64113
Mr. Denis Greene, President, Contact Person
<http://www.tcdf.org>

The Church Development Foundation posits that stewardship is an important aspect of discipleship and our tools and methods reflect that. Stewardship education can be a joyful experience discovering the power of doing God's will. Our approach to fundraising is a church growth model including community building and spiritual discernment, not just asking for money. At the center of every campaign is prayer. Through prayer, one seeks to align one's self with the Divine. It is a deliberate, communal focus that gets everyone praying in the same direction. This alone will transform a parish. We have helped over 150 churches of all sizes raise over \$150,000,000 in the past 12 years in capital campaigns.

Each church we work with is unique in its needs. One size does not fit all, so we spend a great deal of time and effort developing a unique plan for each parish. We offer more time, more attention to detail and more follow-through than is the norm. TCDF has an experienced staff with a tremendous depth of knowledge regarding what works in parish capital campaigns. Our consultants and campaign facilitators have come to TCDF with a mission in mind. We all want to serve churches, we all have unique skills in fundraising and all of us want to work in the faith community for spiritual reasons. Our staff can complete every task planned in the 500 - 700 hours usually required to manage a campaign. We can do as little as the standard consulting service in which we guide and coach you to success or as much as hands-on management of every detail, every publication and attending every meeting.

Community Counselling Services, Inc.

8750 W. Byrn Mawr Suite 420

Chicago, IL 60631

(800) 832-3214

www.ccsfundraising.com

Mr. Paul Miles, Contact Person

CCS is a full service fund raising, development service and strategic consulting firm with their Midwest operations office based in Chicago. CCS works with all non-profit organizations including parishes, dioceses, health care, education, associations, social service and more. As a leader in this industry, CCS provides services in campaign direction, annual appeals, development operations, research, training and feasibility studies. CCS has worked with the Diocese of Rockford on the United in Faith Campaign, St. Peter in Geneva on three campaigns, Our Lady of Good Counsel in Aurora, St. John Neumann in St. Charles, Holy Cross in Batavia and many other Catholic parishes in the Diocese. They have assisted in raising over \$85 million for Catholic organizations in the Diocese in the past 12 years. CCS Executives include Bernadette Lane, Patrick Moughan, and Paul Miles.

Cosgriff Company

The Douglas Building

209 South 19th Street

Omaha, NE 68102

(800) 456-9902

www.cosgriffco.com

Mr. Mike Fitzpatrick, Contact Person

Mike Fitzpatrick is CEO and President of the firm. Our primary method of serving our clients' needs comes through resident service. This means that a Cosgriff consultant is there on-site for a specified period of time, to ensure that your project goes smoothly and stays "on target." This is the most efficient way to conduct a campaign, and at the same time the most reliable method to ensure your success.

To assist this end, we also provide the following services: Developmental Feasibility Studies, Pre-campaign Positioning, Resident Case Management, Case Construction, Prospect Identification, Major Gift Solicitation, Campaign Follow-Up, and Grant Preparation. They have had previous experience in this diocese.

The Cunneen Company**24 Rossotto Drive****Hamden, CT 06514****(800) 842-4488****<http://www.cunneen.com>****Mr. Wayne Miller, Contact Person**

Mr. John Cunneen is President and Mr. Wayne Miller is the Regional Director. Our approach has always been to provide the most effective, innovative and creative fundraising campaigns for our clients. All Cunneen's services – Offertory Enhancement, Stewardship, Feasibility Studies, In-Pew and On-Site Director Capital Campaigns, and Intentional Giving (an electronic giving solution) – are infused with a commitment to providing fundraising that is firmly grounded in the principles of Biblical Stewardship. Previous past experience in this diocese and very interested in working in this diocese.

Graham-Pelton**39 Beechwood Road****Summit, NJ 07901****(800) 608-7955****<http://www.grahampelton.com>****Craig Hall, Executive VP and Managing Director, Contact Person**

Graham-Pelton Consulting is a full-service fundraising firm. We believe that successful parish and diocesan campaigns not only achieve their immediate goals but also enhance the mission, image, and strength of the parish or diocese. Our experienced consultants structure each campaign to maximize your ability to:

- Create a positive relationship among volunteer parishioners
- Plan for strategic, long-term fundraising initiatives
- Widen the donor base and increase donor loyalty
- Inject the practices and teachings of stewardship in all written material and when soliciting parishioners

Guidance in Giving, Inc.

225 Snedecor Avenue

Bayport, NY 11705

(888) 757-5444

www.guidanceingiving.com

Mr. Michael Cusack – President & CEO, Contact Person

Mr. Stephen Babcock – Vice President, Contact Person

Guidance in Giving is a national full-service stewardship, development and campaign consulting firm that *works exclusively and solely* with Catholic parishes, dioceses and schools.

We offer our parish clients full-service (residential/on-site) campaign direction that is based in the precepts of stewardship and customized to fit the needs of each individual parish community. Our full-time, on-site service allows us to manage the day to day operations of a campaign, and allows the parish leadership and staff to focus on their core mission, that of serving the people. Our on-site director ensures that every aspect of the campaign is implemented effectively, taking into consideration the uniqueness to each parish, its strengths and challenges, and doing so in a timely and organized manner.

The most effective method of engaging families concerning the needs of the parish and raising the maximum amount of funds is through personal education and solicitation.

Our capital campaigns look to incorporate a variety of strategies that look to maximize personal contact through small and large group receptions, in pew and mail appeals, volunteer contacts and follow up, etc. The length of a Guidance in Giving capital campaign is dependent on the number of families currently registered in your parish. In addition to our capital campaign services, we also provide a wide array of other services including feasibility/planning studies, development audits and stewardship implementation.

Guidance in Giving has recently worked with St. Margaret Mary, Algonquin and is working extensively in the state of Illinois and throughout the United States. We welcome the opportunity to meet with your parish, at no obligation to you, to discuss your projects and how we can help you achieve your goals and dreams.

The James Company
610 Country Ridge Square
Woodstock, IL 60098
(877) 337-1126 local (815) 206-0700
<http://www.jamescompany.com>
Mr. John V. Clark, President/Partner, Contact Person

This regional, non-residential, stewardship group serves Christian churches throughout the mid-west. Main offices include: Chicago, Milwaukee, Minneapolis and Naples, FL.

The James Company was established in 1985 and has twenty-one personnel on staff. They base their philosophy on Christian stewardship principles and offer a wide-range of stewardship services.

Capital Appeals represent approximately 70% of their services. *The James Company* recommends an initial feasibility study process which is a separate contract. If the study is positive, the intensive phase of the Capital Campaign generally takes four to five months to complete.

The fundraising model employed by *The James Company* is flexible and is designed to relate to the culture of the parish. A team of two consultants is assigned to each campaign: a program director and program administrator. They care for all of the administrative details of the campaign (including writing and printing materials) so that the parish office is not encumbered with taking on the administrative tasks of a campaign.

The James Company provides continued services to the parish throughout the multi-year giving period to insure fulfillment of the pledges made to the campaign.

There is no charge for an initial meeting with a representative of *The James Company*. Typically, the initial meeting is with the Pastor and Parish Council. A reference list is available upon request.

Joseph Consulting
6025 Shadowbrook Dr
Bettendorf, IA 52722
(563) 823-0184
email: emk8dad@mchsi.com
Mr. George Joseph, Contact Person

Mr. George Joseph is the President and Mrs. Erika Mildred is the Development Associate. Joseph Consulting offers comprehensive stewardship development and feasibility studies/capital campaigns that help organizations identify key leadership, financial ability, volunteer support, overall consensus on design, and allow your organization to test the project while at the same time pre-selling it, generating

enthusiasm, excitement, and a level of personal connection, commitment, and involvement. Our comprehensive campaign process maximizes the potential support for your organization. We have helped Catholic Churches and Schools raise more than \$40,000,000 in the past decade.

Our method places the study and the campaign directly in the hands of those who should be in charge, your parish families. We help to create and instill a sense of personal ownership for the people of your parish. This established ownership and pride in the project is what will position your organization to collect all of the secured pledges over the pledge period.

Our expertise lies not only in our methodology but in our location. We have worked with over two dozen parishes and schools in Iowa and Illinois. We know the area and the people, and we know what works for this region. Even more specifically, we have a myriad of experience specifically to the unique aspects of the Catholic market. Over the past decade, we have worked primarily with Catholic institutions in the Diocese of Davenport, Peoria, Des Moines, and Archdiocese of Dubuque.

James D. Klote & Associates, Inc.
Midwest Regional Office
1750 E. Main Street – Suite 190
St. Charles, IL 60175
Ph: (630) 797-3103, (888) 360-2315 (Toll free)
www.jdklote.com
Carl Graber, Regional Director, Contact Person

James D. Klote & Associates provides ***unique full time, on-site***, Readiness Assessments/Feasibility Studies and Capital Stewardship Programs for churches and parochial schools. In any given year approximately **90% of our clients are local churches** and **95% of our clients are repeat or referrals from satisfied clients**. Our resident directed approach combines spiritual values of stewardship and a proven method of successful fund raising. Our Director is available on a full time basis and will live in your community, worship at your church, and take the time to truly understand your vision, needs, and goals. Our proven approach assists our church clients to raise an average of **5 times their annual giving**. As a result, our fees are typically a much lower percentage of funds raised than most other fundraising firms. James D. Klote and Associates strives to achieve your maximum fundraising potential.

Lynch Development Associates, Inc.
74 New York Ave – Suite 2
Huntington, NY 11743
Phone: 631-351-1368 x301
Fax: 631-424-0277
Website: www.lynchdevelopment.com
Email: info@lynchdevelopment.com
Mr. Kevin Lynch, President, Contact Person
Approval pending

For almost 15 years, Lynch Development Associates has been helping Diocese, Parishes, Schools, Retreat Houses and Religious Communities with meeting their structural, liturgical, ministerial, social and fiscal needs through our Stewardship and Capital Campaign Services.

With over 1.5 billion raised and boasting one of the strongest success rates in the industry, our firm's commitment to meeting the needs of our clients is unsurpassed. By providing the very latest in modern technology to present our clients needs to providing bilingual and trilingual directors when needed to reach out to your entire community, Lynch Development aims to professional customize your programs to meet your institutions needs.

Phoenix Fundraising Counsel, Ltd.
2631 University Ave., Suite 102
Madison, WI 53705
(608) 233-1501
www.phoenixfundraising.com
Mr. John H. Richert, Ph.D., President, Contact Person

John H. Richert, Ph.D. is President of this firm. We have been active throughout the upper Midwest and Colorado with stewardship and capital campaigns for various Catholic organizations. We conducted campaigns for some of the Rockford Diocesan High Schools. We offer residential management counsel, which includes strategic long-range planning, direct mail services, capital campaign counsel, planned giving consultation, staff and board member evaluation and development and education and training of volunteers.

Pruehs & Associates, LLC
1754 North Washington Street
Naperville, IL 60563
(630) 245-1300

www.pruehs.net

jpruehs@pruehs.net

John C. Pruehs, President, Contact Person

For more than 25 years, Pruehs and Associates have been serving nonprofit clients, including religious organizations, throughout the Midwest. Our service areas include fund raising and philanthropic consulting, public relations and creative design, marketing and research, strategic management consulting and collaborative strategies. Our senior team builds successful, confidential and individualized working relationships that help each client fulfill and strengthen their mission and achieve significant financial goals.

We are prepared to provide services in all areas of fund raising including feasibility studies and capital campaign consulting; market research and donor and prospect research; staff and board member evaluation, development and training; annual fund campaigns; case statement development, grant writing services and appeals; major gift programs including planned giving and endowment program consultation; and all promotional materials for your campaign including multi-media presentations.

Our team approach will help you build upon your mission. Pruehs and Associates welcome an initial meeting with your board or campaign committee to help you reach unprecedented growth.

RSI

Mr. Jim Urbanus, Contact Person

Approval Pending

Ruotolo Associates, Inc.
2 Dundee Park, Suite 205A
Andover, MA 01810
(800) ruotolo or
(978) 475-6890

www.ruotoloassoc.com

Mr. James J. Caporale, President and COO, Contact Person

Ruotolo Associated, Inc. is a philanthropic consulting firm which specializes in Catholic philanthropy. For over 29 years, we have successfully assisted nearly 900 non-profit organizations, of which approximately 62% have been Catholic dioceses, parishes, schools, and other religious institutions throughout the United States. Moreover, 87% of

the parishes that we have been fortunate to serve have reached or surpassed their fundraising goals.

Ruotolo Associates serves to propagate the faith and mission of the Church throughout the United States. The Church Division has a successful track record with stewardship, capital campaigns, debt reduction initiatives, and strategic communication and planning.

Ruotolo Associates is a member of the International Catholic Stewardship Council and the Giving Institute: *Lending Consultants to Non-Profits* (formerly AAFRC), and adheres to the National Conference of Catholic Bishops' Guidelines for Fund Raising.

The Steier Group
10844 Old Mill Road, Suite 1
Omaha, Nebraska 68154
(866) 391-3244
www.steiergroup.com
Mr. Jim Steier Jr., CEO, Contact Person

The Steier Group was created to serve Catholic nonprofit organizations and to professionally assist them in securing funds to reach their development and fundraising goals. The value we bring to our clients is measured by the success of the efforts we manage. Since the inception of the Steier Group, our completed campaigns have raised an average of 115% of goals.

The Steier Group offers nonprofit organizations a full range of development and fundraising services, specializing in feasibility studies and capital campaign management. We are a hands-on, project management firm. Our campaign managers are only assigned to one project at a time, working on site three days per week. This maximizes our ability to design and implement a comprehensive campaign strategy, to train and manage the campaign leaders and volunteers and to help conduct solicitations. The campaign manager assigned to you has the benefit of the experience and expertise of the entire group at his or her disposal; which also includes dedicated grant writers, graphic designers and communication/video production specialists.

Trinity Fund Raising Consultants, Inc.

2171 Jericho Turnpike, Suite 347

Commack, NY 11725

(866) 296-3445

www.trinityfundraising.com

Mr. Thomas V. Farrell, CEO, Contact Person

Mr. Andrew J. White, Vice President, Contact Person

Trinity Consultants, Inc. is a national Catholic fundraising firm. The company specializes in on-site direction of Capital Campaigns, Stewardship Programs and Annual Giving Appeals for diocese, parishes, schools and other religious institutions.

Over the past two decades the firm has directed thousands of successful campaigns and programs for our clients. In addition to our Capital Campaign and Stewardship Planning Studies, the firm provides other comprehensive services such as; Planning Studies, Major Gift Programs, Prospect Research, Multi-Media Presentations, Annual Giving Programs, Foundation and Grant Writing and Pledge Redemption.

For more information on Trinity and to schedule a no obligation appointment with one of our representatives, please call our toll free number or visit our web site.

Walsh & Associates

Church Fundraising & Stewardship Specialists

1601 East Highway 13, Ste. 200

Burnsville, MN 55337

(800) 894-3863

info@walshfundraising.com

www.walshfundraising.com

Mr. Michael A. Walsh, President, Contact Person

Walsh & Associates, Church Fundraising & Stewardship Specialists, has been helping Catholic churches and church members reach new heights since 1984. Our capital campaign services include pre-campaign feasibility and planning studies, campaign implementation and follow-up & fulfillment services and support. Our stewardship services include stewardship program evaluations, stewardship formation & education, and volunteer and financial stewardship efforts. From our Regional Office located in Cary, Illinois, we've most recently served St. Hubert Catholic Church in Hoffman Estates and St. Mary Catholic Church in Minooka and we're readily available to serve the parishes of the Diocese of Rockford. So if you're ready to reach new heights in your fund development and stewardship efforts, give us a call. We'd be happy to help.