

**Goals for the Implementation of Stewardship**  
Diocese of Rockford  
Recommended by Diocesan Stewardship Commission  
Approved on May 1, 1998  
by Bishop Thomas Doran

**Annual Review at January 25, 2002 Meeting**  
**Stewardship Commission of Diocese of Rockford**

**Goal 1:**

The Rockford Diocese leadership: Bishop, Curia, Diocesan Department staff, Consultative and Advisory bodies will:

- affirm and promote Stewardship as a significant priority of this diocese;
  - A. **The *United in Faith* Endowment Campaign was conducted in 105 parishes around the diocese with Bishop Doran's approval and support. This campaign called for a challenge to all Catholics within the diocese to make a deeper commitment to the life of the church with their time, talent, and treasure.**
  - B. **The *United in Faith* Endowment Campaign received pledges of approximately 43 million dollars. Of the monies pledged, approximately 11 million dollars has been collected. The first distribution of parish rebates occurred in April with \$225,000 returned to parishes.**
  - C. **Because of the *United in Faith* Campaign, new Diocesan Endowment Funds have been established in the *Catholic Foundation for the People of the Diocese of Rockford* for: Catholic Education, Religious Education and Youth Ministry, Seminarian and Continuing Priest Education, and Needy Parishes and Schools. Parishes have been encouraged to use their rebated funds from this campaign to establish or fund their own Catholic Foundation Endowment funds, pay off debt, or to save for capital projects.**
  - D. **Bishop Doran approved the use of the "Whose Birthday Is It, Anyway" Advent booklet and wrote the cover letter published in each copy. There were over 4000 copies distributed to eight parishes. Msgr. Kagan reviewed and approved the alternative-giving list that was included in this booklet.**
- seek ways to integrate the teaching and practices within their areas of responsibilities;
  - A. **The distribution of the Rockford Diocese Children's Stewardship Manual to be used in Parish Catholic Schools and Religious Education Programs was continued and completed. The Director of Parish Stewardship attended the Principal and DRE deanery gatherings around the diocese.**
  - B. **The Ministry Formation Office offered a Stewardship specialization day for those enrolled in the two-year program. The Director of Parish Stewardship presented sessions at this event.**
  - C. **The Discussion Paper for the combining of time, talent, and treasure appeals in the parishes was distributed and discussed with the Diocesan Stewardship Commission, Diocesan Finance Council, Diocesan Pastoral Council, Parish Business Managers, Presbyteral Council, 7 Priest Deanery Meetings.**
  - D. **The Communications Office worked in close cooperation with the Office of Stewardship Development such as: creative assistance with the development of campaign materials, advertising and annual reports.**

- sponsor educational opportunities for diocesan and parish leaders and all membership;
  - A. Office of Stewardship Development published three editions of the Sharing Newsletter, twelve issues of Parish Stewardship Update and two issues of the Perpetual Light Newsletter. Each of these publications was distributed to close to 1,500 parish stewardship leaders.**
  - B. In the Spring 2001 four regional training sessions were conducted for parish Time, Talent, and Treasure efforts. Nine regional meetings were conducted to train parish leaders for the *United in Faith* Endowment Campaign which included the 2001 Diocesan Stewardship Appeal. Several priest meetings for individual blocs in the *United in Faith* campaign were conducted. In the fall four regional training sessions were conducted for Witness Training.**
  - C. Parish Business Managers and High School Development Directors were convened by Office of Stewardship Development staff throughout the year for support, self-help and skills improvement opportunities.**
  - D. Office of Research and Planning collaborated with the Stewardship Office by researching the issue of mega-parishes in neighboring dioceses. They also helped the Stewardship Office develop a strategy for determining the net worth of a parish in the Census Tract Net Worth Parish Project.**
  - E. The annual Parish Stewardship Day was held in a new location at Christ the Teacher parish in DeKalb. Bishop Robert Morneau was the keynote speaker and while the attendance was not high, the attendees evaluations were the highest ever for this event.**
  - F. The annual Perpetual Light Mass was held 9/8/01 for members of the Perpetual Light Society**
  - G. The Catholic Foundation hosted the annual Participants' Meeting in November with a focus on education for attendees. Sandra Behringer of the Archdiocese of Indianapolis was the keynote speaker.**
- incorporate Stewardship teachings, principles and practices into fund-raising, volunteer recruitment, budgetary decisions and statements of accountability.
  - A. A document linking Stewardship theology, spirituality and practices with the *United in Faith* campaign was developed and distributed to all volunteers who worked on the campaign.**
  - B. Staff from the Development Office was present at all *United in Faith* campaign training sessions and made visits to parish report meeting to lift up the connection between stewardship and the *United in Faith* campaign.**
  - C. Thousands of parishioners assumed leadership and volunteer roles for the *United in Faith* campaign.**
  - D. During May of 2001 the Office of Finance and Administration published the annual Financial Statement for the Diocese of Rockford.**
  - E. At the Diocesan Fiscal Management Conference, Jean Morris Trumbauer was invited to raise the issues of volunteer recruitment, development, and retention. There was a very positive response to her material.**

**Goal 2:**

Each parish of the Rockford Diocese will:

- establish a Stewardship Commission (or a leadership structure) that is committed to Stewardship and is dedicated to educating and promoting the teachings and practices of Stewardship within the parish;
  - A. 57 parishes have some form of stewardship leadership. Each of these parishes has established or is establishing Stewardship Commissions or advocates.**
  
- foster year-around Stewardship education;
  - A. 85 parishes are listed as presenting the Stewardship message in an on-going manner. These parishes are currently sharing the message in various forms and media and in varying time intervals. This information is being clarified by a current phone survey of the Eight Characteristics of a Stewardship Parish.**
  
- conduct an annual parish appeal of time, talent and treasure with the goal of achieving full participation of its membership;
  - A. 60 parishes are presenting an annual Stewardship of Treasure Appeal.
    - a. 47 parishes presenting the appeal at their preferred “best” time schedule.
    - b. 13 parishes presenting the appeal combined with the Diocesan Stewardship Appeal.**
  - B. 64 parishes are presenting an annual Stewardship of Time & Talent Appeal.**
  - C. 59 parishes are tithing a percentage of their income to other charities ranging from less than one percent to over ten percent of their ordinary income.**
  
- educate about time and talent opportunities at the diocesan level;
  - A. In two editions of *The Observer*, the Diocesan Time and Talent Sign-up Sheet was published. Fifteen individuals filled out the form. Each filled-in form was sent to the appropriate Department Head for follow-up.**
  
- exceed its Diocesan Stewardship goal by striving to gain pledges for at least 110% of its goal from all of its membership;
  - A. Diocesan Stewardship 2000 was completed on May 31, 2001. The \$5,216,851 goal was surpassed with pledges of \$5,892,162 (112.9% of goal) and payments of \$5,349,241. DS2000 presented the largest refund ever to the parishes being \$503,702. There were 55 parishes over goal with 32,080 donors making a pledge.**
  - B. Diocesan Stewardship 2001 was incorporated into the *United in Faith* Campaign. \$5.5 million was allocated as its portion of the \$35 million drive. The *United in Faith* Campaign achieved pledges of \$43 million from 28,870 donors.**
  
- strive for contributions from all members to the Combined Collections for the Universal Church.
  - A. 2001 National Appeal - \$467,365 (\$28,122 more) – 10,727 donors (220 more)**
  - B. 2001 International Appeal - \$404,525 (\$41,515 less) – 9,974 donors (519 less)**
  - C. 2001 Mission Appeal - \$366,435 (\$54,991 less) – 9,591 donors (222 less)**

**Goal 3:**

All entities of the Rockford Diocese will:

- educate about Stewardship of Assets;
  - A. 21 parishes have a group or an individual responsible for promoting planned giving**
  - B. 12 e-mail tips sent to pastors with email and planned giving contacts**
  - C. All diocesan high schools are participating in a planned giving/development support group with 2 meetings held in 2001**
  - D. Every new account in Catholic Foundation received resource manual on promoting and educating on planned gifts**
  - E. Catholic Foundation sent Leave-A-Legacy brochures to Winnebago and Boone County parishes**
  - F. Catholic Foundation annual report produced for *Observer***
  - G. Several articles in *Observer* on Foundation and planned giving ideas**
  - H. Met with four new priests to discuss services of the Office**
  - I. 125 people attended the annual dinner in November which introduced a new educational format**
  - J. Director of Planned Giving participated in a local planned giving networking group and chaired the committee for Leave A Legacy Annual meeting**
  
- promote planned gifts as a meaningful expression of stewardship;
  - A. 6 Wills Seminars conducted in CY2001**
  - B. 12 new gift annuities established totaling \$503,254**
  - C. Approximately 85 “check offs” from diocesan appeals contacted by letter and phone call.**
  - D. Numerous meetings with individual donors and Perpetual Light members**
  
- establish an account in the *Catholic Foundation for the People of the Diocese of Rockford*.
  - A. 12 new accounts established in the Catholic Foundation totaling \$936,614 including
 
    - a. 1 new donor advisory endowments (17 total)****
  - B. Only 11 parishes do not have an account in Catholic Foundation**
  - C. Total deposits to the Catholic Foundation during CY2001 were \$2,792,696**