

# **Goals for the Implementation of Stewardship**

Diocese of Rockford

Recommended by Diocesan Stewardship Commission

Approved on May 1, 1998

by Bishop Thomas Doran

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## **Annual Review**

**Stewardship Commission of Diocese of Rockford**

**January 25, 2002 Meeting**

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### ***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 received pledges of approximately 43 million dollars. Of the monies pledged, approximately 20 million dollars has been collected. Total distributions of parish rebates to date equal \$1.3 million returned to parishes. Parishes have been encouraged to use their rebated funds from this campaign to establish or fund their own Catholic Foundation Endowment funds, payoff debt, or to save for capital projects.**
- B. Because of the *United in Faith* Campaign a new permanent committee, which includes 45 members from around the diocese, was created by Bishop Doran. The first meeting was held in August 2002 at which time an executive committee was organized. Bishop Doran empowered this committee to be responsible to make all decisions regarding investments, distribution of earnings, and reinvestment of earnings.**
- C. 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 4200 copies distributed to seventeen 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. Children's Stewardship remains a priority and two schools participated in stewardship presentations for each grade level. The Director of Parish Stewardship presented these materials to the children.**
- 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 and the numbers of those participating increased again this year.**
- C. The proposal for a unified time for parish renewals of time, talent, and treasure was tabled by Bishop Doran for future consideration. The Bishop encouraged parishes to voluntarily participate in the Fall 2002 Parish Stewardship effort.**
- 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, annual reports, and stewardship materials.**

-sponsor educational opportunities for diocesan and parish leaders and all membership;

- A. Office of Stewardship Development published two editions of the Sharing Newsletter, eleven issues of Parish Stewardship Update and two issues of the Perpetual Light Newsletter. Each of these publications was distributed to close to 1,600 parish stewardship leaders and donors.**
- B. In the Spring 2002 seven deanery training sessions were conducted for Diocesan Stewardship. In the fall 5 regional training sessions were conducted for the pilot parishes doing renewals of their Time, Talent, and Treasure appeals. The Parish Stewardship Training Manual was introduced. The fall regional meetings included training for planned giving, presented by John Sentovich; lay witness training, presented by Dave Hougan; and Parish Stewardship training, presented by Bob Pfundstein.**
- 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. The annual ICSC Conference was held in Toronto. Dave Hougan led a Diocesan delegation representing 5 parishes to this inspiring leadership event.**

-incorporate Stewardship teachings, principles and practices into fund-raising, volunteer recruitment, budgetary decisions and statements of accountability;

- A. Diocesan Stewardship focused on the Bishops' Pastoral Letter in making the connection between stewardship and the Eucharist. There was also a video produced making all parts of the diocese visible.**
- B. During May of 2002 the Office of Finance and Administration published the annual Financial Statement for the Diocese of Rockford.**
- C. At the Diocesan Fiscal Management Conference, John Sentovich and Mike LaLoggia presented a session on Parish Planned Giving Committees and establishing a Planned Giving Society. Dave Hougan and Bob Pfundstein continue to serve on the Fiscal Conference Planning Committee.**

## **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. 55 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. 63 parishes are presenting an annual Stewardship of Treasure Appeal.**

**a. 16 parishes have used the pilot parish materials for 2002.**

**b. 22 parishes presenting the appeal combined with the Diocesan Stewardship Appeal.**

**c. 47 parishes presenting the appeal at their preferred "best" time schedule.**

**B. 67 parishes are presenting an annual Stewardship of Time & Talent Appeal.**

**a. 14 parishes have used the pilot parish materials for 2002**

**b. 53 parishes presented time and talent appeals at their preferred time.**

**C. 62 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. Hundreds of parishioners assumed leadership and volunteer roles for the 2002 Diocesan Stewardship appeal and many others are involved in diocesan commissions and committees.**

-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 2001 was incorporated into the *United in Faith* Campaign. \$5.5 million was allocated as its portion of the \$35 million drive.**

**B. Diocesan Stewardship 2002 had a target of \$5,727,823. 85% of the goal was achieved in pledges from 27,700 donors (29% participation rate).**

-strive for contributions from all members to the Combined Collections for the Universal Church;

**A. 2002 National Appeal - \$418,486 (\$48,879 less) - 10,037 donors (690 less)**

**B. 2002 International Appeal - \$364,654 (\$39,871 less) - 9,331 donors (643 less)**

**C. 2002 Mission Appeal - \$362,280 (\$4,155 less) - 8,702 donors (889 less)**

**Total Collected - \$1,145,420 from 28,070 Total Gifts for an average gift of \$40.81**

**14,965 different donors made a gift to at least one of the appeals. This is a 15.8% participation rate for the 2002 Combined Collections.**

**Goal3:**

All entities of the Rockford Diocese will:

-educate about Stewardship of Assets;

- A. 39 parishes have a group or an individual responsible for promoting planned giving (18 more than last year)**

**Parish finance councils that hosted planned giving presentations this year:**

**St. Peter, South Beloit  
SS. Peter and Paul, Cary - twice  
St. Mary, Galena  
St. Mary, DeKalb  
St. Michael, Galena  
St. Peter, Geneva  
St. Thomas, Crystal Lake  
St. Mary, Oregon**

**St. Andrew, Rock Falls  
St. Patrick, McHenry  
St. Thomas, Freeport  
St. Patrick, Dixon  
St. Patrick, Rochelle  
St. Joseph, Lena  
St. Patrick, Rockford**

- B. E-mailed 12 planned giving tips to pastors and planned giving contacts**
- C. All diocesan high schools are participating in a planned giving/development support group with 2 meetings held in 2002**
- D. Catholic Foundation annual report produced for *Observer***
- E. Several articles in *Observer* on Foundation and planned giving ideas**
- F. Met with four newly ordained priests to discuss planned giving services and the Catholic Foundation**
- G. Director of Planned Giving participated in a local planned giving networking group and chaired the committee for Leave A Legacy Annual meeting**
- H. The annual Perpetual Light Mass was held 9/21/02 for members of the Perpetual Light Society. 35 members participated.**

-promote planned gifts as a meaningful expression of stewardship;

- A. Catholic Legacy Symposium introduced at Holy Family Parish**

- B. 9 Wills Seminars conducted in CY2002**

**St. Thomas, Freeport  
St. Thomas, Crystal Lake  
Holy Apostles, McHenry  
Holy Cross, Batavia  
Holy Family, Rockford**

**St. Mary, East Dubuque  
St. Patrick, Rochelle  
St. Anne, Dixon  
St. Charles Borromeo, Hampshire**

- C. 8 new gift annuities established totaling \$210,458**
- D. Approximately 80 "check offs" from diocesan appeals contacted by letter and phone call.**
- E. 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. 14 new accounts established in the Catholic Foundation**
- B. Only 9 parishes do not have an account in Catholic Foundation**
- C. Total deposits to the Catholic Foundation during CY2002 were \$1,725,714**