

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

Stewardship Commission of Diocese of Rockford

January 28, 2005 Meeting

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 Diocesan Stewardship Commission and the Office of Stewardship Development continue to provide ongoing services to parishes, schools and diocesan organizations regarding the implementation of the Catholic teachings and practices of stewardship in the Rockford Diocese. The Commission, made up of one priest and one lay or deacon representative per deanery met three times. Their charge is to assist with the discernment of what is needed in this diocese to bring the teachings and practices of stewardship to a deeper level of acceptance by the members and parishes of the diocese.**
- B. The *United in Faith (UIF)* Endowment Campaign received pledges of approximately 43 million dollars. Of the monies pledged, approximately \$31 million has been collected. Total distributions of parish rebates to date equal \$2.8 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.**
- C. The Executive Committee of the President Appointed Committee (P AC) of the *United in Faith* Campaign met in March, June and August 2004 to to make critical decisions about the investment and distributions of the UIF funds. The Membership Committee organized and defined membership criteria and recruited new members to join the PAC. The Needy Parish and School Committee met and further defined the criteria for grants and processed many applications for funding. The full P AC also in August to distribute the earnings generated by the investments of the five endowments. \$1.2 million was available for distribution. One half - \$600,000+ was distributed from the Catholic Schools, Religious Education, Priests Retirement, Seminarian Education and Needy Parishes and Schools endowments. The other half was distributed to Retained Earnings for future distributions.**
- D. The Diocese of Rockford continues to be a member of the International Catholic Stewardship Council. The staff of the Office of Stewardship Development participated in a regional meeting with counterparts from Wisconsin, Illinois, Indiana, and Michigan. The Office staff also convened the Illinois directors in December for prayer, support and sharing. The Diocese supports the International Catholic Stewardship Council endowment campaign, which will promote stewardship at the diocesan and parish levels in the United States and throughout the world.**
- E. 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 1300 copies distributed to ten**

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 the presentation material was revised. Four principals were contacted to encourage participation in stewardship presentations. The Director of Parish Stewardship prepared children's stewardship presentations and gave them at Romero, St Margaret Mary, and St Rita Rockford in January and February of 2004. Separate presentations were also made to the Our Lady of Good Counsel teachers and Education Commission. A stewardship retreat day was presented to the staff of Romero School. The *Junior Observer* has been putting children's stewardship messages into each edition.**
- B. The Ministry Formation Office offered a specialization day for those enrolled in the two- year program, who are looking at stewardship as their possible parish ministry. The Director of Parish Stewardship presented the session to six participants.**
- C. The Office of Stewardship Development updated the Parish Stewardship Manual and recruited twenty-four parishes to conduct their stewardship renewal in the fall of 2004.**
- 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.**
- E. Bob Pfundstein continues to serve on the Evangelization Commission of the Diocese in order to continue the Evangelization and Stewardship connections.**

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

- A. Office of Stewardship Development published one edition of the Sharing Newsletter, two issues of Parish Stewardship Update and two issues of the Perpetual Light Newsletter. Each of these publications was distributed to approximately 1500 parish stewardship leaders and donors.**
- B. In the Spring 2004 five deanery training sessions were conducted for Diocesan Stewardship. One hundred and twenty (120) leaders from 53 parishes attended these meetings. In August, seven regional training sessions were conducted for the parishes doing renewals of their Time, Talent, and Treasure appeals. The Parish Stewardship Training Manual was revised and shipped to every parish. The manual was also distributed in electronic format on a CD for the first time. The fall regional meetings included Parish Stewardship training, presented by Bob Pfundstein. St Peter Parish, South Beloit hosted a school development session for school parents and other interested parishioners.**
- 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 New Orleans. There were 14 participants from the Rockford Diocese in attendance representing 9 parishes. The Office of Stewardship Development received two international awards for excellence. A first place award was presented for "Total Diocesan Stewardship Effort" and an honorable mention was presented for the materials for the 2004 annual appeal featuring the art work of Rob Olsen, director of religious education at Sacred Heart parish in Marengo.**

E. The Office of Stewardship Development sent an informational mailing to all seminarians. Through a joint effort with the Vocations Office we also held a training session with ten seminarians staying in Rockford during the summer .

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

- A. Diocesan Stewardship focused on the theme Be a Ray of Hope and used sections of the Stewardship Pastoral Letter as a foundation of the printed materials.**
- B. During May of 2004 the Office of Finance and Administration published the annual Financial Statement for the Diocese of Rockford in conjunction with the Diocesan Stewardship Appeal materials in an issue of the *Observer* distributed to every registered household.**
- C. At the Diocesan Fiscal Management Conference, Dave Hougan and Bob Pfundstein served on the organizing and planning committee. John Sentovich, Bob Pfundstein and Dave Hougan conducted a seminar on the best practices of parishes in regard to various stewardship efforts.**

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. 62 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. 90 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.**

-conduct an annual parish appeal of time, talent and treasure with the goal of achieving full participation of its membership;

- A. 75 parishes are presenting an annual Stewardship of Treasure Appeal.**
 - a. 24 parishes have used the recommended fall timeline and materials for 2004.**
 - b. 18 parishes presenting the appeal combined with the Diocesan Stewardship Appeal.**
 - c. 33 parishes presenting the appeal at their preferred "best" time schedule.**
- B. 76 parishes are presenting an annual Stewardship of Time & Talent Appeal.**
 - a. 24 parishes have used the timeline and materials for 2004**
 - b. 52 parishes presented time and talent appeals at their preferred time.**
- C. 66 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. Twenty-five 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 2004 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 2003 showed improvement over 2002. With a goal of \$5,556,060, 28,508 donors (29%) pledged \$5,264,078, which is 94% of the goal.**
- B. Diocesan Stewardship 2004 has a target of \$5,924,154. As of January 24, 2005 \$5,407,888 which 91.2 % of goal from 27,277 donors.**

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

- A. 2004 National Appeal- \$430,094 (\$24,701 more) -9,834 donors (418 more)**
- B. 2004 International Appeal- \$421,712 (\$22,164 more) -9832 donors (550 more)**
- C. 2004 Mission Appeal- \$409,555 (\$16,721 more) -9,205 donors (353 less)**

Total Collected -\$1,261,361 (\$65,588 more) from 28,871 total Gifts for an average gift of \$43.70

14,880 different donors made a gift to at least one of the appeals. This is a 15.2% participation rate for the 2004 Combined Collections.

Goal 3:

All entities of the Rockford Diocese will:

-educate about Stewardship of Assets;

- A. 52 parishes have a group or an individual responsible for promoting planned giving (7 more than last year)**

Parish finance councils that hosted planned giving presentations this year:

Annunciation, Aurora

St. John Neumann, St. Chas.

St. Mary, Sycamore

St. Mary, Woodstock

St. Mary, Elizabeth

St. Catherine, Dundee

St. Joseph, Elgin

St. Thos. More, Elgin

St. Rita, Aurora

- 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 2004**
- D. Catholic Foundation annual report produced for *Observer***

- E. The annual Perpetual Light Mass was held 12/14/04 for members of the Perpetual Light Society. About 40 members participated.**
- F. 53 new Perpetual Light Society members for the CY.**
- G. 1 Donor Roundtable in Aurora**

-promote planned gifts as a meaningful expression of stewardship;

A. 14 Wills Seminars conducted in CY2004

SS. Peter and Paul, Cary	St. Patrick, Rockford
St. Chas. Borromeo, Hampshire	St. John Neumann, St. Charles
St. Mary, McHenry	St. James, Rockford
Holy Family, Rockford	St. Andrew, Rock Falls
St. Mary, Elgin	Holy Angels, Aurora
St. Thomas, Crystal Lake	OLGC, Aurora
St. Patrick, Rochelle	St. Stanislaus, Rockford

- B. 5 new gift annuities established totaling \$204,500**
- C. Approximately 100 "check offs" from diocesan appeals contacted by letter and phone call. D. Many meetings with individual donors and Perpetual Light members**
- E. \$726,200 million in bequests and memorial income reported in FY 2005 by parishes so far; \$1.1 million in "other donations"**

-establish an account in the *Catholic Foundation for the People of the Diocese of Rockford,*"

- A. 7 new accounts established in the Catholic Foundation: \$949,962**
- B. 8 parishes still do not have an account in Catholic Foundation**
- C. Total deposits to the Catholic Foundation during CY2004 were \$11.7 million**