

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 27, 2006 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. In February 2005, Bishop Doran issued a letter to all priests regarding the priority of the Parish Stewardship Process to be implemented in the fall of 2005. The bishop asked each parish to form a stewardship committee; send a representative to the fall training meetings; send samples of their stewardship materials and evaluations to the Office of Stewardship Development; and use the expertise of the members of the Stewardship Commission of the Diocese at a local deanery level. This request is being implemented through OSD staff.
- B. 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. The Commission thanked those members who served their deaneries faithfully: Rev. Tim Doherty, Rockford Deanery; Rev. Louis Tosto, McHenry Deanery; and Mr. Jerry Wedige, Freeport Deanery. The new Commission members during 2005 were: Rev. Thomas Brantman, Rockford Deanery; Rev. Sylvester Nnaso, McHenry Deanery; and Dr. Al Tolliver, Freeport Deanery.
- C. The United in Faith (UIF) Endowment Campaign received pledges of approximately 43 million dollars. Of the monies pledged, approximately \$34.4 million has been collected. Total distributions of parish rebates to date equal \$3.6 million returned to parishes. Parishes have been encouraged to use their rebated funds from this campaign to establish or fund their own Catholic Foundation Endowments, pay-off debt, or to save for capital projects.
- D. The Executive Committee of the President Appointed Committee (PAC) of the United in Faith Campaign met in March, June and August 2005 to make critical decisions about the investment and distributions of the UIF funds. At its annual meeting in August, the full PAC authorized the distribution of the earnings generated by the investments of the five endowments. \$1.2 million was available for distribution. One half, \$611,000 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.
- E. 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.

-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. St Peter, South Beloit was the focus of a parent education session on stewardship presented by the Director of Parish Stewardship. The *Junior Observer* continues to put 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 presents this session annually.
- C. The Office of Stewardship Development updated the Parish Stewardship Manual. The manual was delivered to all parishes in both hard copy and electronic CD format. The manual was also placed on the OSD website and sent to development offices around the country who requested a copy.
- D. The Communications Office worked in close cooperation with the Office of Stewardship Development such as: creative assistance, advertising, annual reports, and stewardship materials. All campaign materials will include a sign-up check-off box allowing donors to subscribe to *The Observer*.
- E. The Director of Parish Stewardship 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 parishioners;

- A. Office of Stewardship Development published two editions of the Sharing newsletter 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 2005 four regional training sessions were conducted for Diocesan Stewardship. One hundred and twenty (120) leaders from 53 parishes attended these meetings. Two seminarians were the guest speakers. They shared their vocation story and their experiences as a seminarian for the Rockford Diocese.
- C. Parish Stewardship training was held around the Diocese.
 - i. In August, seven deanery training sessions were conducted for the parishes doing renewals of their Time, Talent, and Treasure appeals. 99 individuals representing 51 parishes attended .The Director of Parish Stewardship presented the theme "We Give You Thanks" from the Gloria and the Parish Stewardship Resource Manual was handed out.
 - ii. The Office of Stewardship Development and the Diocesan Hispanic Ministry conducted two Stewardship training sessions. Mr. Carlos Proaño, Vice President of Guidance in Giving, was the consultant for both events. In June 2005, all staff members of the Hispanic Ministry and all priests serving in Spanish-speaking parishes participated in a full day of stewardship education and training. In September one hundred Spanish-speaking leaders from nineteen parishes participated in a full day training session. Topics included: theology of stewardship, cultural adaptation of the stewardship message for the Spanish-speaking in the US, and the role of the pastor and the stewardship committee in presenting the message to the laity.
- D. Parish Business Managers were convened by Office of Stewardship Development staff throughout the year for support, self-help and skills improvement opportunities. Major areas of concern include the creation and upkeep of the Parish Administrative Resource Manual, creation of job description and salary guidelines for parish for parish positions, and an annual spiritual retreat.

- E. Two staff and seven parish leaders attended the ICSC International Conference in San Francisco. Workshops for parish and diocesan leaders helped to deepen participants' skills and spirituality.
- F. Extensive work was done to re-create the Office of Stewardship Development's website. Deacon Greg Urban volunteered his expertise in website creation and worked very closely with the staff. Besides updating all the areas of the website, visitors now have the ability to make on-line donations to the various Combined Collections for the Universal Church, the Diocesan Stewardship Appeal and the Diocesan Administration Building. A link was placed on the Rockford Diocese's website to allow visitors there to have easy access to the Office's website so that they can make a donation. The website address is: www.stewardshiprockford.org.
- G. In May the Office of Stewardship Development sent an informational mailing to all seminarians. Through a joint effort with the Vocations Office, the Office staff conducted a stewardship training session in July 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 2005 focused on the theme taken from the Year of the Eucharist. In the printed materials, quotes were taken from the Stewardship Pastoral Letter linking stewardship and the Eucharist.
- B. In May of 2005 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. For the annual Diocesan Fiscal Management Conference, staff of the Office of Stewardship Development served on the organizing and planning committee. The Stewardship Workshop was conducted by Mr. John Howard of Peoria who spoke about using modern communications methods to promote stewardship. Archbishop James Keleher, the Episcopal Liaison to the International Catholic Stewardship Council shared the keynote address with Bishop Doran.

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. 68 parishes have some form of stewardship leadership. Each of these parishes has established or is establishing Stewardship Commissions or advocates. (6 more than last year)

-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. Many parishes include information in their Sunday bulletin, parish newsletter, website, school and religious education materials, welcome packets at varying times throughout the year. (Same as last year)
- B. Annual reports have become an important stewardship tool for many parishes and have helped create a better sense of accountability for the parishioners.

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

- A. 80 parishes are presenting an annual Stewardship of Treasure Appeal. (5 more than last year)
 - i. 44 parishes have used the recommended fall timeline.
 - ii. 10 parishes presented the appeal combined with the Diocesan Stewardship Appeal.
 - iii. 26 parishes presented the appeal at their preferred "best" time schedule.
- B. 88 parishes are presenting an annual Stewardship of Time & Talent Appeal. (12 more than last year)
 - i. 21 parishes have used the recommended fall timeline and materials for 2005
 - ii. 60 parishes presented time and talent appeals at their preferred time.
 - iii. 7 parishes present personal invitations in place of the time and talent appeal.
- C. 68 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. (2 more than last year)

-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 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 2005 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 2004, a 6.6% increase over the previous year, achieved 92.1% of its target of \$5,924,154. Pledges were \$5,457,427. Payments were \$5,054,757, which increased by \$264,700. There were 27,424 donors.
- B. Diocesan Stewardship 2005, a 1% increase over the previous year, is achieving 99.2% of its target of \$5,983,393. As of January 21, pledges are \$5,934,258, \$478,000 ahead of all of last year; payments are \$438,000 ahead of last year. Donors are at 28,640 which is 1,200 more donors.

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

- A. 2005 National Appeal- \$457,522 (\$35,810 more) - 9,604 donors (228 less)
- B. 2005 International Appeal- \$421,046 (\$11,330 more) - 8,997 donors (210 less)
- C. 2005 Mission Appeal- \$473,591 (\$38,780 more) - 9,597 donors (341 less) * nine more months remain

Total Collected -\$1,352,159 (\$90,798 more) from 28,198 donations (779 less) for an average gift of \$48.02.

14,547 different donors made a gift to at least one of the appeals. This is a 14.6% participation rate for the 2005 Combined Collections.

- D. Since the inception of Combining the Collections for the Universal Church, \$22,414,329 has been contributed.

Goal 3 -- All entities of the Rockford Diocese will:

-educate about Stewardship of Assets;

- A. 57 parishes have a group or an individual responsible for promoting planned giving (5 more than last year).
- 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 2005. The group meets to discuss various topics relating to fundraising and volunteering at the high school level. Participants are encouraged to bring new materials to share with colleagues along with recent challenges that are inhibiting participation.
- D. The Catholic Foundation annual report was produced for *The Observer* in November. The purpose of this report is primarily openness and accountability to donors and participants. The report includes a statement of financial position, a letter from Greg Urban, chairman of the Board, a letter from the Exec. Director and a charitable gift annuity ad.
- E. The annual Perpetual Light Mass was held 12/7/05 for members of the Perpetual Light Society, with Bishop Doran as presider. About 40 members participated. Brunch followed Mass with Msgr. Brady giving reflection.
- F. There are 153 members of the Perpetual Light Society, eight more than last year. Members of the Perpetual Light Society have informed the diocese that they have remembered the Church with a planned gift (bequest, charitable gift annuity, charitable trust, life insurance, etc.). Members received two issues of the Perpetual Light newsletter. Five parishes requested their own copies to make available to parishioners.
- G. Every parish received a personalized end-of-year giving flyer in the mail with instructions for implementation. Several parishes requested email copies to insert directly into the bulletin. The focus this year was on the KETRA legislation that allowed cash contributions to be deducted up to 100% of Adjusted Gross Income (AGI). Normally the limitation is 50% of AGI. One parish reported that three 5-figure gifts were attributed to their promoting the KETRA opportunity.
- H. 13 wills seminars were conducted in 2005. Approximately 275 people attended the seminars, which is an average of about 21 per seminar. Attendees were given basic estate planning information by local attorney (wills, trusts, probate, powers of attorney, living wills, choosing an executor) along with ideas from the Director of Planned Giving on how to remember church in their estate plan. Response to the new marketing brochure has been excellent.
- I. 6 new gift annuities were established totaling \$105,000.
- J. 29 "check offs" from diocesan appeals contacted by letter and phone call. All check-offs receive information on gift annuities and/or bequest language, along with a brochure on joining the Perpetual Light Society.
- K. Many meetings with individual donors and Perpetual Light members. Currently working on 6-figure Charitable Remainder Trust for donor that will eventually be an endowed gift.
- L. From July 1 through December 31, 2005, parishes have reported \$999,000 in bequests; \$1.4 million in "other donations"

-establish an account in the Catholic Foundation:

- A. 7 new accounts established in the Catholic Foundation: \$151,890
- B. 8 parishes do not have an account in Catholic Foundation
 - i. 2 in De Kalb Deanery
 - ii. 1 in Aurora Deanery
 - iii. 5 in Sterling Deanery
- C. Total deposits to the Catholic Foundation during CY2005 were \$3,509,099.78 (includes participant contributions, gift annuities and UIF deposits).
- D. Total assets in Foundation as of 12/31/05: \$69,146,132