

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 26, 2007 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. David Engbarth, Aurora Deanery, Rev. Ed Seisser Deanery; and Mr. Brian Boyd, McHenry Deanery. The new Commission members during 2006 were: Mr. Jose Acosta, Hispanic Ministry ex-officio, Rev. Tim Piasecki, Aurora Deanery, and Rev. Geoff Wirth Elgin Deanery;
- C. The United in Faith (UIF) Endowment Campaign received pledges of approximately 43 million dollars. Of the monies pledged, approximately \$35.2 million has been collected. Total distributions of parish rebates to date equal \$4.3 million returned to parishes. Parishes have been encouraged to use their rebated funds from this campaign to establish or fund their own Catholic Foundation Endowments, pay-off debt, or to save for capital projects.

The Executive Committee of the President Appointed Committee (PAC) of the United in Faith Campaign met in June and August 2006 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. \$1,735,451 was available for distribution. \$1,260,972 was distributed from the Catholic Schools, Religious Education, Priests Retirement, Seminarian Education and Needy Parishes and Schools endowments. The remaining \$74,479 was distributed to Retained Earnings for future distributions. Retained earning achieved the 10% of corpus level that was the goal of the UIF PAC.

- 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.

-seek ways to integrate the teaching and practices within their areas of responsibilities;

- A. Children's Stewardship is continuing through messages included in each edition of the *Junior Observer*.
- B. The Ministry Formation Office offers 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 this session on April 1, 2006.
- C. The Office of Stewardship Development updated the Parish Stewardship Manual. The manual was delivered to all parishes in an 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 2006 seven deanery training sessions were conducted for Diocesan Stewardship. 103 leaders from 47 parishes attended these meetings. Representatives of Catholic Charities described the services of this agency and provided informational materials for the attendees.
- C. Parish Stewardship training was held around the Diocese. In August, seven deanery training sessions were conducted for the parishes doing renewals of their Time, Talent, and Treasure appeals. 75 individuals representing 29 parishes attended .The Director of Parish Stewardship presented the theme "Every Worthwhile Gift...Comes From Above" from James 1:17-18 and the Parish Stewardship Resource Manual was handed out.
- 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 five parish leaders attended the ICSC International Conference in Boston. Workshops for parish and diocesan leaders helped to deepen participants' skills and spirituality. The Director of Parish Stewardship was invited to serve on the 2007 Conference Planning Committee.
- 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 October the Office of Stewardship Development conducted a stewardship training session for the Deacons in formation. Through a joint effort with the Vocations Office, the Office staff has received an invitation to present the stewardship message to the Junior Clergy.

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

- A. Diocesan Stewardship 2006 focused on the theme taken from the Liturgy of the Word for Pledge Sunday. In the printed materials, quotes were taken from the Stewardship pastoral letter linking stewardship.
- B. In May of 2006 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. A one-day format was attempted. More people attended.

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. 72 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. Many parishes include information in their Sunday bulletin, parish newsletter, website, school and religious education materials, welcome packets at varying times throughout the 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. 22 reports have come from parishes not reporting last year.
- C. Despite various obstacles, overall parish ordinary income within the Diocese has increased for the 16th consecutive year in our records.

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

- A. 74 parishes are presenting an annual Stewardship of Treasure Appeal.
 - i. 36 parishes have used the recommended fall timeline.
 - ii. 9 parishes presented the appeal combined with the Diocesan Stewardship Appeal.
 - iii. 29 parishes presented the appeal at their preferred "best" time schedule.
- B. 89 parishes are presenting an annual Stewardship of Time & Talent Appeal.
 - i. 37 parishes have used the recommended fall timeline and materials for 2006
 - ii. 33 parishes presented time and talent appeals at their preferred time.
 - iii. 19 parishes present personal invitations in place of the time and talent appeal.

- C. 71 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 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 2006 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 2005, a 1% increase over the previous year, achieved 99.9% of its target of \$5,983,393. Pledges were \$5,980,808, \$523,381 ahead of all of last year; payments are \$503,787 ahead of last year. Donors are at 28,740 which is 1,320 more donors.
- B. Diocesan Stewardship 2006, a 3.3% increase over the previous year, is achieving 100.3% of its target of \$6.2 million. Pledges are at 6,201,862 which is \$221,000 ahead of last year at this time; payments are about \$186,000 ahead of last year. There are 800 less donors.
- C. Since the inception of the Diocesan Appeal in 1975, \$103,452,228 has been pledged

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

- A. 2006 National Appeal- \$490,168 (\$32,646 more) - 9,821 donors (217 more)
- B. 2006 International Appeal- \$470,525 (\$49,479 more) - 9,257 donors (260 more)
- C. 2006 Mission Appeal- \$482,600 (\$9,009 more) - 9,701 donors (104) * nine more months remain

Total Collected -\$1,443,293 (\$91,134 more) from 28,779 donations (581 more) for an average gift of \$50.19.

14,711 different donors made a gift to at least one of the appeals. This is a 14.5% participation rate for the 2006 Combined Collections.

- D. Since the in the inception of Combining the Collections for the Universal Church in 1984, \$23,869,076 has been contributed.

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

-educate about Stewardship of Assets;

- A. 66 parishes have a group or an individual responsible for promoting planned giving (16% 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 2006. 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.

The March meeting was a discussion about class rep programs for annual funds. The November meeting was a discussion on promoting the annual fund with parents and grandparents.

Each meeting begins with an open discussion about current projects and a sharing of marketing materials recently produced.

- 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 brief messages from participants who witnessed to the benefits of having an account.
- E. There are 242 members of the Perpetual Light Society. 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.
- F. Every parish received a personalized end-of-year giving flyer in the mail with instructions for implementation. The focus this year was on the IRA Rollover bill which allows donors 70 ½ and older to make a tax-free contribution from their IRA to a qualified charity. I will be communicating in early 07 with parishes to determine how many parishioners took advantage of this opportunity. To date, I have heard that there has been one gift for \$3,000 and one for \$1,850.
- G. 9 wills seminars were conducted in 2006. Approximately 221 people attended the seminars, which is an average of 25 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 marketing brochure continues to be excellent.

For various reasons, some seminars did not get evaluated by participants. Of those that did complete evaluations nine (9) people said that when they will remember the parish in their will when they complete one, or revise their existing one. Five (5) said that they have already remembered the parish in their will. Using the NCPG standard of \$10,000 for bequest designations, \$140,000 in deferred gifts were identified through the seminar process this year.

One seminar produced a \$225,000 gift of property; another resulted in a \$10,000 gift annuity.

- H. Eight new gift annuities were established totaling \$346,496.

- I. 40 "check offs" were contacted from diocesan appeals. The following is the breakdown by appeal:
- 3 from Nat'l Appeal
 - i. 1 request for will info.
 - ii. 2 informing us they have remembered church in their will and requesting info. on the Perpetual Light Society
 - 7 from Int'l Appeal
 - i. 3 requesting CGA info.
 - ii. 2 requesting will info.
 - iii. 2 informing us they have remembered church in their will and requesting info on the Perpetual Light Society
 - 10 from Mission Appeal (2 checked more than one box)
 - i. 4 requesting will info
 - ii. 4 requesting CGA info
 - iii. 4 informing us they have remembered church in their will and requesting info on the Perpetual Light Society
 - 12 from DS
 - i. 5 requesting CGA info.
 - ii. 5 requesting will info
 - iii. 2 informing us they have remembered church in their will and requesting info. on the Perpetual Light Society
 - 1 from Observer Time and Talent form
 - i. 1 informing us they have remembered church in their will and requesting info. on the Perpetual Light Society
 - 7 from PLS newsletter
 - i. 3 requesting info brochure on reply card
 - ii. 4 informing us they have remembered church in their will and requesting info on the Perpetual Light Society
- J. From July 1 through December 31, 2006, parishes have reported \$1.9 million (\$1 million more than last year at this time) in bequests; \$1.3 million in "other donations", about \$100,000 less than last year.

-establish an account in the Catholic Foundation:

- A. Nine new accounts established in the Catholic Foundation: \$174,880
- B. Four parishes do not have an account in Catholic Foundation (4 less than last year)
- i. 2 in DeKalb Deanery
 - ii. 1 in Aurora Deanery
 - iii. 1 in Sterling Deanery
- C. Total deposits to the Catholic Foundation during CY2006 were \$2,705,356 (includes participant contributions, gift annuities and UIF deposits).
- D. Total assets in Foundation as of 12/31/06: Approximately \$74.7 million