

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 25, 2008 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 Stewardship Commission of the Diocese 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. Bob Jones, Sterling Deanery. The new Commission members during 2007 were: Sr. Katrina Lamkin, McHenry Deanery; Mr. J. Greg Langan, Sterling Deanery, Rev. Msgr. Thomas Dzielak, Sterling Deanery, and Ms Lisa Bales was appointed as a pastoral agent for stewardship formation.
- B. The Stewardship Commission of the Diocese and the Office of Stewardship Development experimented with the production of professionally designed and printed educational and annual renewal materials for Parish Stewardship of time, talent and treasure. These materials were distributed to each parish in the fall of 2007. A survey was sent to each parish seeking feedback and determining how the materials were used. As of January 2008, fifty seven parishes have replied. Results of the survey are incorporated into the facts stated in Goal 2 of this report.
- C. The United in Faith (UIF) Endowment Campaign received pledges of approximately 43 million dollars. Of the monies pledged, approximately \$36,052,116 has been collected (\$750,000 in 2007). Total distributions of parish rebates to date equal \$4.5 million which have been 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 of the United in Faith Campaign (UIF PAC) met in June, July and August 2007 to make critical decisions about the investment and distributions of the UIF funds. A new distribution policy was agreed upon. 25% of earnings are distributed to each corpus, retained earnings received enough to achieve 10% of corpus and the balance was distributed to the beneficiaries of the Endowment. With the new distribution of earnings into corpus, the UIF PAC wishes to achieve eventually the original goals of the United in Faith Endowment Campaign: \$8 million to Catholic Schools; \$8 million to Seminarian and Priests Continuing Education; \$4 million to Religious Education and Youth Ministry; \$3.5 million to Needy Parishes and Schools and \$2.5 million to Priests Retirement Fund.

At its annual meeting in August, the full PAC authorized the distribution of the earnings generated by

the investments of the five endowments. \$3,276,545 was available for distribution. According to the new policy, 25% of earnings or \$819,136 was invested proportionately into the corpus of each of the United in Faith Endowments. \$2,309,973 was distributed from the Catholic Schools, Religious Education, Priests' Retirement, Seminarian Education and Needy Parishes and Schools endowments. \$147,436 was distributed to Retained Earnings for future distribution and in order to achieve the 10% of corpus level of the UIF endowments.

- 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, Ohio, 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.
- C. The Director of Parish Stewardship assisted the Ministry Formation Office in developing a curriculum for a voluntary third-year of Ministry Formation. One session will be devoted to the connections between stewardship and evangelization.
- 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 and the Ministry Day Committee of the Diocese in order to continue the connections between stewardship and these important efforts of the diocese. .
- F. In June the Director of Development and Fr. Piasecki of the Stewardship Commission lead an introductory session focusing on the teachings and practices of stewardship to the Hispanic Ministry Coordinators.
- G. Members of the Diocesan Centennial Committee met extensively with the staff of the Office of Stewardship Development to brainstorm ways to link the diocesan centennial celebration and the 2008 Diocesan Stewardship Appeal.

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

- A. Office of Stewardship Development revised the format of the office newsletter published two editions. The new stewardship newsletter is a combination of the Sharing newsletter and the Perpetual Light Newsletter. The new name of the newsletter is *Stewardship - A Way in the Rockford Diocese*. Each of these publications was distributed to approximately 1500 parish stewardship leaders and donors.
- B. Parish Business Managers were convened by Office of Stewardship Development staff four times 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.

- C. In February 2007 the Office of Stewardship Development conducted a stewardship training session for the Deacons during their Annual Assembly Day. The deacons were encouraged and given ideas to promote stewardship within their current ministry.
- D. In March 2007 five deanery training sessions were conducted for Diocesan Stewardship 2007. 72 leaders from 31 parishes attended these meetings. At these meetings, various parish youth ministers assisted Matt Schwartz describing the services of the Diocesan Youth and Young Adult Ministry Office. Attendees received information about the upcoming appeal and learned about successful strategies to promote stewardship and the participation in the appeal.
- E. In March 2007, the Office of Stewardship Development presented the practical elements of stewardship as it is implemented in the parish to the Junior Clergy. The Junior Clergy were exposed to the various programs of the Office and given many resources to introduce them to make stewardship successful in a parish setting.
- F. In June 2007 the office staff provided an orientation session to nine seminarians in the summer program. Stewardship as a Way of Life, the Pastoral Letter and a general orientation of the major services of the office were presented.
- G. In August 2007 Parish Stewardship training meetings were conducted in five locations for the parishes doing renewals of their Time, Talent, and Treasure appeals. 114 individuals representing 45 parishes attended. The Director of Parish Stewardship presented the theme “Living Simply, Giving Simply” and the Parish Stewardship Resource Manual was handed out.
- H. In September 2007, three staff and four parish leaders attended the ICSC International Conference in Miami. The Director of Development and Director of Parish Stewardship each presented a workshop. Workshops for parish and diocesan leaders helped to deepen participants’ skills and spirituality. The Director of Parish Stewardship served on the 2007 Conference Planning Committee. The Director of Development is currently serving on the 2008 Conference Planning Committee.
- I. Extensive work was performed to maintain the Office of Stewardship Development’s website. Visitors now have the ability to calculate scenarios comparing various Planned Gift instruments. Sacrificial givers also have the ability to use a tithing calculator to evaluate their regular giving. On-line donations to the various Combined Collections for the Universal Church, the Diocesan Stewardship Appeal and the Diocesan Administration Building continue to be used. All graphics for Diocesan Stewardship, Parish Stewardship and the Combined Collections were made available on the web site for easy access. The website address is: [.stewardshiprockford.org](http://stewardshiprockford.org).

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

- A. Diocesan Stewardship 2007 focused on the theme taken from the Liturgy of the Word for Pledge Sunday, which was Good Shepherd Sunday. In the printed materials, quotes were taken from the Stewardship pastoral letter linking stewardship.
- B. In May of 2007 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.

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. 75 parishes have some form of stewardship leadership. Each of these parishes has established or is establishing Stewardship Commissions or advocates.

-foster year-round Stewardship education;

- A. 96 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. Some as frequently as weekly and some just a couple of times per 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. Now in the second year of a written request for reporting both treasure and time & talent, 28 reports have been received.
- C. Despite various obstacles, overall parish ordinary income within the Diocese has increased for the 17th 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. 75 parishes are presenting an annual Stewardship of Treasure Appeal.
- B. 92 parishes are presenting a Stewardship of Time & Talent Appeal. Some of the smaller parishes are only conducting this appeal every other year as that best suits their real needs.
- C. 46 parishes have eliminated second collections for ordinary expenses.
- D. 69 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. The Diocesan Time and Talent Sign-up Sheet was published in *The Observer*. Twelve 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 2007 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 2006, a 3.3% increase over the previous year, achieved 101.4% of its target of \$6.2 million. Pledges were \$6,285,267 which is \$304,459 ahead of last year; payments were \$246,723 ahead of last year. There are 598 less donors.

B. The current status of Diocesan Stewardship 2007 is at 103.4% of its goal with \$6,590,451 in pledges. Pledging is exceeding all of the 2006 appeal by \$305,184. Payments exceed last year at this same time by \$204,288. There are 58 parishes at goal by pledges. The average pledge is \$232.50. There are 343 more donors than all of 2006.

C. Since the inception of the Diocesan Appeal in 1975, \$104,632,068 has been pledged

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

A. 2007 National Appeal- \$544,985 (\$51,832 more) – 9,790 donors (37 less)

B. 2007 International Appeal- \$495,707 (\$23,997 more) - 9,050 donors (211 less)

C. 2007 Mission Appeal- \$491,257 (\$9,450 less) - 9,441 donors (486 less) * nine more months remain Collected -\$1,531,949 (\$66,379 more) from 28,312 donations (703 less) for an average gift of \$54.11.

14,432 (279 less) different donors made a gift to at least one of the appeals. This is a 14% participation rate for the 2007 Combined Collections.

D. Since the in the inception of Combining the Collections for the Universal Church in 1984, \$25,422,302 has been contributed.

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

-educate about Stewardship of Assets;

A. Sixty-nine 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. Inaugurated new Planned Giving e-Newsletter beginning in September 2007 which includes PG tips. Permanent Deacons and Business Managers are now included in the monthly distribution that now goes to 415 recipients.

C. All diocesan high schools continue to participate in a planned giving/development support group with two meetings held in 2007. 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.

Each meeting begins with an open discussion about current projects and a sharing of marketing materials recently produced. The schools directors should be congratulated for the fine work they are doing introducing new marketing materials aimed at encouraging students to choose to attend their school as well as reinforcement pieces for the parents. Video on CD seems to be the new thing.

D. The Catholic Foundation annual report was produced for *The Observer* in late November. The purpose of the annual report is primarily openness and accountability to donors and participants. The report includes an audited statement of financial position; a letter from Dan Weiler, the new Chairman of the Board; a letter from the Executive Director, and descriptions of each of the nine investment managers that are being used in for investments in the Foundation and how much they are

managing.

- E. There are in excess of 250 members in 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, residue of charitable gift annuity, charitable trust, life insurance proceeds, etc.). Members receive the Perpetual Light newsletter which has recently become a section of the new Diocesan Stewardship newsletter.
- F. Every parish received a end-of-year giving flyer in the mail with instructions for implementation. The primary focus this year was again on the IRA Rollover bill which allowed donors 70 ½ and older to make a tax-free contribution from their IRA to a qualified charity. This IRS provision ended on December 31, 2007. We noted a handful of parishioners who took advantage of this final opportunity.
- G. Thirteen Wills Seminars were scheduled and eleven were conducted in CY2007. Two seminars were cancelled by the pastors due to lack of pre-registrants. A total of approximately 200 people attended the seminars, which is an average of 18 persons per seminar. Attendees are presented with basic estate planning information by local attorney (wills, trusts, probate, powers of attorney, living wills, and choosing an executor) along with ideas from the Director of Planned Giving on how to remember their parish and the Diocese in their estate plan. Remaining copies of the marketing brochure are being modified for the details of the new Executive Director. Response to the brochure continues to be excellent.
- H. Eight new gift annuities were established in CY2007 totaling \$450,715.
- I. We have received 20 "check off" inquiries in CY2007 from the boxes on diocesan appeal envelopes.
- J. We received two major gifts at the end of CY2007. First was a gift of 47 acres of land and the second was a \$500,000.00 cash gift to benefit one of our high schools.

-establish an account in the Catholic Foundation:

- A. Fifteen new accounts were established in the Catholic Foundation during CY2007 totaling \$932,600
- B. Seven parishes do not have an account in Catholic Foundation:
 - i. 1 in Aurora Deanery
 - ii. 2 in DeKalb Deanery
 - iii. 2 in Rockford Deanery
 - iv. 2 in Sterling Deanery
- C. Total deposits to the Catholic Foundation during CY2007 were \$4,312,836 (includes participant contributions, gift annuities and UIF deposits).
- D. Total assets in the Foundation as of December 31, 2007 are approximately \$79.16 million