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 22, 2010 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 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 Stewardship Commission of the Diocese and the Office of Stewardship Development provided a third second year of professionally designed and printed educational and annual renewal materials for Parish Stewardship of time, talent and treasure.

C. The United in Faith (UIF) Endowment Campaign received pledges of approximately 43 million dollars. Of the monies pledged, $36,250,251 has been collected. December 2008 was the last month that the Office of Stewardship Development sent out payment mailers on pledges.

   Total distributions of parish rebates to date equal $4,557,202 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 August 2009 to decide whether there is a need to have a full PAC Meeting since there were no current earnings nor retained earnings to distribute. The Executive Committee decided to cancel the meeting in order to save energy and people's time. The only business that needed to be decided was the Asset Allocation for the new fiscal year. The Executive Committee chose to maintain the 65/35 allocation. They authorized a vote by mail. Since the results of the mailing was not unanimous for the recommended allocation and because not everyone voted, the motion failed. The Executive then decided that the last approved allocation motion was in 2008, that allocation will remain in effect for this fiscal year.

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 Region VII meeting in Lafayette, Indiana with counterparts from Wisconsin, Illinois, and Indiana. There were also participants from Ohio and Michigan.

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

A. Stewardship continues to be promoted through messages included in each edition of the *Observer* .

B. The Ministry Formation Office offered a specialization day for those enrolled in the two- year program. The Office of Stewardship Development participated in that day with those who are considering stewardship as their parish ministry.

C. The Director of Parish Stewardship co-presented a session on stewardship and evangelization to those who attended a voluntary third-year of Ministry Formation.

D. The positive role of stewardship continues to be infused in other Diocesan ministries such as the Evangelization Commission and the Ministry Day Committee of the Diocese with participation by the Director of Parish Stewardship. The Communications Office also continues to work closely with the Office of Stewardship Development through all of their media outlets and by assisting in the development and production of advertising, annual reports and other stewardship materials.

E. The Stewardship Commission's Committee for linking Stewardship with the members of the Hispanic Ministry continued to work on ways to bring the stewardship message to the Hispanic parishioners. A pilot program to train Hispanic leaders in stewardship teachings and the creation of a stewardship committee

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

A. Two editions of the *Stewardship – A Way of Life in the Rockford Diocese* were published and mailed or e-mailed to over 1500 parish stewardship leaders and donors. The Planned Giving E-Newsletter was sent out monthly to over 400 recipients.

B. Parish Business Managers were convened by Office of Stewardship Development staff three 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 September 2009 the Director of Parish Stewardship conducted a stewardship training session on the topic of Simplicity for the Deacons Aspirants and their wives. The deacons and their wives were challenged to live simply and to promote stewardship within their ministry.

D. In March 2009 seven regional training sessions were conducted for Diocesan Stewardship 2009. One hundred leaders representing 40 parishes attended. The meeting explored the difficult economy and its impact on giving. Also the theme was focused on the Year of St. Paul.

E. In July and August 2009 Parish Stewardship training meetings were conducted in seven locations for the parishes doing renewals of their Time, Talent, and Treasure appeals. 81 individuals representing 38 parishes attended .The Director of Parish Stewardship presented the theme "Cherishing and Tending God's Gifts Responsibly" and the Parish Stewardship Resource Manual was handed out on a CD. The printed materials were sent to all parishes in July.

F. In October 2009, two staff and four parish leaders attended the ICSC International Conference in Dallas. Diocesan participants were appreciative for the many and varied workshops available to

deepen their skills and spirituality. The Director of Development and Director of Parish Stewardship each presented workshops.

G. The Office of Stewardship Development created and maintains two web sites. One is for Stewardship and one is for the Catholic Foundation. We continued work on and updated both sites at least weekly. Hot links within and outside the site are regularly checked to make sure they are still valid. On-line donations to the various Combined Collections for the Universal Church, the Diocesan Stewardship Appeal and the Diocesan Administration Building continue to increase in frequency. Bulletin graphics for Diocesan Stewardship, Parish Stewardship and the Combined Collections are updated and made available on the web site for easy access by parish personnel. On the Stewardship web site we now have a separate section for Capital Campaigns. The website addresses are: www.stewardshiprockford.org and www.foundationrockford.org.

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

A. In May of 2009 the Office of Finance and Administration published the expanded 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.

B. The Office of Stewardship Development staff assisted parishes that were running Capital or Debt-reduction Campaigns and helped integrate stewardship teachings into each campaign. This help was either through direct assistance in running the campaign or through working with the hired fund raising consultant.

C. The Diocesan Approved Capital Campaign Firms listing was revisited and additional professional fund raising firms were interviewed by the Director of Stewardship Development and included on the list.

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. 93 parishes are listed as presenting the Stewardship message in an on-going manner. Many parishes include information in their Sunday bulletin, parish newsletter, website, school and religious education materials, welcome packets at varying times throughout the year.

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

participation of its membership;

A. 64 parishes are presenting an annual Stewardship of Treasure Appeal.

B. 90 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. 41 parishes have eliminated second collections for ordinary expenses.

D. 76 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. Hundreds of parishioners assumed leadership and volunteer roles for the 2009 Diocesan Stewardship appeal while many others are involved in diocesan commissions and committees. The Diocesan Time and Talent Sign-up Sheet was published in *The Observer*. Fourteen individuals filled out the form. Each filled-in form was sent to the appropriate Department Head for follow-up.

-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 2008 ended at 99.7% of its goal with $6,520,174 in pledges. Payments were $6,073,147. There were 55 parishes at goal by pledges, 40 by payments. The average pledge was $232.96. There were 27,988 donors.

B. The current status of Diocesan Stewardship 2009 is at 97.5% of its goal with $6,119,831 in pledges. Payments are keeping pace with last year at this same time. There are 60 parishes at goal by pledges. The average pledge is lower than last year at $226.06.

C. Since the inception of the Diocesan Appeal in 1975, $117,342,831 has been pledged

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

A. 2009 National Appeal- $544,951 – 9,475 donors - average gift $57.51

B. 2009 International Appeal- $474,327 - 8,689 donors – average gift $54.59

C. 2009 Mission Appeal- $500,837 * (not final) 8,893 donors – average gift $56.32

Collected -$1,520,115 from 27,050 donations - average gift of $54.31.

13,800 different donors made a gift to at least one of the appeals. This is a 13.4% participation rate for the 2009 Combined Collections.

D. Since the in the inception of Combining the Collections for the Universal Church in 1984, $28,458,003 has been contributed.

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

-educate about Stewardship of Assets;

A. Sixty-nine (69) parishes have a group or an individual responsible for promoting planned giving.

B. We continue to distribute monthly Planned Giving e-Newsletters which include timely Planned Giving tips for insertion into parish bulletins. Current distribution stands at 390 recipients. These include all Diocesan Priests, Permanent Deacons, Parish Business Managers, Catholic Foundation board members, and select planned giving professionals within the Diocese.

   All high schools within the diocese continue to participate in a planned giving/development support group facilitated by the diocesan director of planned giving. Two meetings were held in 2009. This 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 full participation. Our most recent presentation was Fr. Charles Reichenbacher of Marmion on the subject of "*making the ask*."

C. The Catholic Foundation Annual Report was produced for *The Observer* in late November. The purpose of publishing the annual report is primarily openness and accountability to donors and participants. The report this year included an audited statement of financial position and letters from Dan Weiler, the Chairman of the Board and the Executive Director. The ad also contained a section on why the Catholic Foundation exists.

D. There are now 176 members in the Perpetual Light Society. The Perpetual Light Society includes those persons who have informed the Diocese that they have remembered their parish or the Diocese with a planned gift (bequest, residue of charitable gift annuity, charitable trust, life insurance proceeds, etc.) and who request membership. Members receive a recognition certificate signed by the Bishop, invitations to brunches held from time-to-time and the Diocesan Stewardship Newsletter, which now includes a "Perpetual Light Society" section.

E. Every parish pastor and business manager received copies of the 2009 end-of-year giving flyer in the mail with instructions for implementation. In addition to listing the standard areas of giving (cash, appreciated securities, etc.), there was a continued focus on the Charitable IRA Rollover. The IRA rollover is part of the Pension Protection Act of 2006 which was extended through Dec. 31, 2009, in the Emergency Economic Stabilization Act of 2008. The provision allowed donors 70½ and older to make tax-free contributions from their IRA to a qualified charity up to a maximum of $100,000 per year. We noted several donations to parishes using this provision.

F. Wills Seminars were conducted at various parishes throughout the Diocese in CY2009. A total of 141 people attended these seminars. Seminar attendees are presented with basic estate planning information by a local attorney (wills, trusts, probate, and powers of attorney) along with ideas from the Director of Planned Giving on how to remember their parish and the Diocese in their estate plan. Copies of the existing marketing brochure continue to be modified for the details of the PG Director. Response from participants at the seminars continues to be excellent.

G. One new Charitable Gift Annuity was established in CY2009 in the amount of $50,000.

H. We have received 42 "check off" inquiries in CY2009 from the boxes on diocesan appeal envelopes.

I. Several major gifts (greater than $100,000) were received by parishes during CY2009. Both were residuals from personal estates upon the donor's death.

-establish an account in the Catholic Foundation:

A. Six (6) new accounts were established in the Catholic Foundation during CY2009 totaling $630,718. Three (3) of these accounts, totaling $528,335 were Provisional (non-endowed) Donor Advised Funds. This year the Catholic Foundation board enacted a change to the retained earnings policy. Beginning January 1, 2010, retained earnings will be accounted for separately from the corpus allowing each (corpus and retained earnings) to be invested differently and go up and down based upon investment market gains/losses. This change was made to allow participants, who over the years placed annual account earnings (in good years) into retained earnings for future withdrawal, to have access to these funds during bad years when funds are needed most. The prior policy froze retained earnings when there was a market loss to protect corpus. A new provision called UPMIFA enacted in the State of Illinois effective June 30, 2009, allowed the board to make this prudent change.

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 CY2009 were $967,022. (Includes participant contributions, gift annuities and UIF deposits). Foundation deposits this year continued to lag behind prior years. The reason most commonly given us is fear. That is, participants desire to keep funds available for immediate use. Participants continue to use DIAL for this purpose.

Total assets in the Catholic Foundation as of December 31, 2009 are approximately $67.89 million, up from $53.82 million at the end of CY2008. This increase is due primarily to investment gains.