



"We Give You Thanks"

Parish Stewardship 2005

*By Bob Pfundstein
Director of Parish Stewardship*

The Office of Stewardship Development is finalizing plans to help you and your parish renew your stewardship appeals. Coming in August, all around the Diocese, parishes will host regional meetings where they will prepare their individualized parish stewardship plan in conjunction with the materials prepared by the Office of Stewardship Development. Your parish is welcome to participate in any of these meetings.

In 2001 there was a proposal to present parish stewardship at the same time for all parishes. Initially the idea was supported in concept but the timing was determined to be too soon after the very successful United in Faith campaign. The idea was placed on hold for further review at a later date. Bishop Doran has now formalized this parish stewardship initiative by encouraging all parishes to follow a four step approach to parish stewardship each year.

- ❖ The first step is to develop stewardship leaders at the parish and gather them into a stewardship committee who will help conduct the annual renewals of time, talent, treasure and assets as well as educate the parish about stewardship.
- ❖ The second step is to send "at least" one representative to the fall parish stewardship meetings (see inset on page 2 for dates and locations).
- ❖ Step three is to send copies of your parish stewardship timelines, materials and evaluation forms to the Office of Stewardship Development so that a library of stewardship resources and best practices can be developed and shared.
- ❖ The fourth step is to avail the parish leaders with the expertise of local stewardship leaders from the Stewardship Commission of the Diocese. Each deanery has two representatives, one being a priest from the deanery and the other usually a lay representative. See page 2 for a complete listing of the Stewardship Commission of the Diocese.

The theme "We Give You Thanks," is taken from the Gloria that we pray together at many Sunday liturgies. The theme of thanks continues in many of our other prayers during the Mass and the Eucharistic prayers are full of the message of thanksgiving to God for all that has been done for and given to us through the gift of the Eucharist and the sacrifice of Jesus. Stewardship is integral to our lives of faith as we celebrate the gifts God has provided.

A consistent message offered over a number of years creates a significant change of attitude and faith development for those who hear it. Many who have come to understand stewardship are willing to sacrifice to give God thanks. Please help your parish to give thanks to God for years to come. The appeal materials will be handed out at the regional meetings and should adapt well to any parish schedule. Contact Bob Pfundstein at 815/399-4300 for more information about Parish Stewardship 2005.✚

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May 2005

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Stewardship Events Coming this Fall

Parish Stewardship 2005 Regional Meetings

August 2, 2005 - St. Mary, Elgin
August 4, 2005 - St. Mary, Sterling
August 9, 2005 - St. James, Belvidere
August 10, 2005 - Holy Cross, Stockton
August 11, 2005 - St. Elizabeth Ann Seton,
Crystal Lake
August 17, 2005 - St. Patrick, Rochelle
August 18, 2005 - OLG, Aurora

Parish Stewardship 2005 Appeal

September - October

ICSC Conference

October 2 - 5, 2005
San Francisco, California

Diocese of Rockford Fiscal Management Conference

November 2 - 3, 2005
Crystal Lake, Illinois

"The Inspirational Spirit of Generosity of the People of the Diocese of Rockford"

By David J. Hougan
Diocesan Director

Office of Stewardship Development

You have heard the saying, "Put your money where your mouth is." Recently I have been called upon to make numerous reports to diocesan commissions and councils about the level of financial giving by the people of the Diocese to the Church. As I conclude these reports, I have been summing up the numbers by offering my own heart-felt reflection. *The giving level of the members of this Diocese is truly inspirational.*

When one thinks of how 9/11 has had its long-term negative effect, how the scandal involving the sexual abuse of children has challenged the Church, and how the economy has been weak in the past few years, with job insecurity because of rampant outsourcing of many high paying jobs to low-wage foreign countries, many unemployed taking a lower paying job, the stock market declining, health care costs ever increasing, retirement funds decreasing, one could expect that giving would decline. On the contrary!

Some indicators that I see are:

- ➔ Ordinary giving to the parishes, i.e., Sunday giving, is up by 4.5%. Parishes, which conduct annual stewardship appeals of time, talent and treasure, have increased more.
- ➔ Many parishes have successfully conducted or are currently conducting major capital campaigns for new buildings or for debt reduction. Most of these campaigns have surpassed their goals.
- ➔ Diocesan Stewardship 2004 is ending with an increase of more than \$250,000 collected than the previous year.
- ➔ Diocesan Stewardship 2005 is starting very strongly. There are more parishes achieving their goal much

earlier than in 2004 and the average gift, currently at \$220, is 9.5% higher.

- ➔ Pledges to the United in Faith Endowment Campaign total \$43 million. Currently payments equal close to \$32 million with another year and a half left. Over \$21 million have been placed into the five United in Faith Endowments in the Catholic Foundation; \$5.5 million was used for Diocesan Stewardship 2001, and more than \$3.6 million has been distributed to the parishes for their own uses.
- ➔ There are 198 accounts for \$61.3 million deposited in the Catholic Foundation; 83 Charitable Gift Annuities for \$4.2 million.
- ➔ The three Combined Collections for the Universal Catholic Church have surpassed their previous highs. The Fall 2004 Mission Appeal received \$434,364, the January 2005 National Appeal, \$451,782, and the March 2005 International Appeal, \$404,168 (and still counting.)

To what do I attribute these results? From my encounters with the leaders and the people of the Diocese, I experience a deep faith, trust, and love of God, a true commitment to the mission of the Church, and an ever-deepening acceptance of stewardship as a way of life. Truly the members of this diocese are not only putting their money where their mouth is, but also where their heart is.✝



The Professional Advisor: A Parish's Secret Angel

By John Sentovich
Director of Planned Giving



When it comes to encouraging and securing very sophisticated major and planned gifts, most parishes (and schools) do not have the expertise. These gifts have several common characteristics.

- ✘ They are given infrequently;
- ✘ They are often the largest gift a donor will make during their lifetime or at death;
- ✘ They come after years of relationship building;
- ✘ They are given in the context of an overall estate plan;
- ✘ They are given with the assistance of a professional advisor.

This brief article will focus on who the professional advisors who help make these gifts happen. Here is a list of the most common:

Attorneys – Typically attorneys are the “quarterbacks” of a donor’s estate plan. They are responsible gathering the team of experts and for ensuring that all of the documents like wills, living trusts and powers of attorney are written and executed properly. Many attorneys have clients complete a questionnaire prior to implementing a plan, which often includes a question or two about the charitable giving.

CPAs – Accountants are responsible for ensuring that the donor’s estate plan makes sense from a tax standpoint. Are there recent tax law changes that should be considered? How can the plan minimize estate taxes while ensuring that family needs and favorite charities are benefited?

Bank Officers/Certified Financial Planners

– Trust Officers and CFPs help manage the donor’s investment portfolio. They take into consideration many aspects of the donor’s current circumstances, such as age, assets owned, income needs, and risk tolerance. From this information, a portfolio is built to maximize return and minimize losses.

Life Insurance Professionals

– Life insurance often used as a way for assets to be given to family and charity in an estate plan. Sometimes insurance is used to replace the assets going to charity in a charitable remainder trust.

These professionals are parishioners in most if not all of our parishes in the Rockford Diocese. It is worth the time and effort to get to know them and to ask them to remind their Catholic clients – who have placed a great of trust in them — about remembering their church in their estate plan. Most of these professionals will gladly participate in a wills or estate planning seminar, not to mention serving on the Finance Council or Stewardship Committee. If your parish has an endowment account, make sure they understand its purpose and how a

gift by their client will give back to the parish in perpetuity. You may want to build a database of these professionals so that you can send them information on the parish endowment or other gifting opportunities

annually. Quite often their expertise is reason that large gifts to charity are (or are not) made. For more information, please call me at 815/399-4300. †

