



A Stewardship Focus

What difference does it make?

By Bob Pfundstein
Director of Parish Stewardship

The preliminary results are in. When you make a concerted effort to educate your parishioners about the spirituality of stewardship and the practical aspects of giving, the response is markedly better. As people become more aware of their role as disciples and good stewards of all they have received, they become active participants in the parish community by sharing their time, talent, treasure and assets with the Church.

Last fall, there were nine pilot parishes presenting the Parish Stewardship appeals for time, talent, and treasure to their parishioners. For some of these parishes, this was the first time or the first time in a while, they had presented the stewardship of time & talent to their people. Due to the difficulties in consistently recording the time and talent gifts of the parishioners, we have used this first year as a starting point for the collection of data. We will be able to give recordable changes after the second year of sharing the message. The information regarding the treasure aspect of stewardship is more easily recorded. Below is a chart indicating the growth in the diocesan parishes. We have divided the parishes into four categories. They are the pilot parishes from the Fall of 2002, the parishes which combined their Parish Stewardship appeal with Diocesan Stewardship using the in-church method, the parishes which combined their appeals via direct mail, and all other parishes.

<i>Parish Income Statistics</i>		
<i>July 2002 - December 2002</i>		
	<i>Ordinary Income</i> <i>Average % increase per week</i>	<i>Sunday & Offertory Income</i> <i>Average % increase per week</i>
<i>Stewardship Pilot Parishes</i>	<i>+3.81%</i>	<i>+4.08%</i>
<i>Parish Stewardship & DS combined in-church</i>	<i>+3.30%</i>	<i>+2.63%</i>
<i>Parish Stewardship & DS combined direct mail</i>	<i>+1.38%</i>	<i>-0.07%</i>
<i>All other Parishes</i>	<i>+0.74%</i>	<i>+0.74%</i>

As indicated, those parishes which spent time and effort promoting stewardship within their parish through a direct and planned process have benefited significantly in the income to the parish. The pilot parishes were geographically spread across the diocese. There were both large and small parishes included, and the parishes were distributed across income levels. In these efforts, it appears that the people have heard the message about stewardship as a way of life driven by a committed faith. The experiences at many of our pilot parishes indicates that a simple stewardship focus can make a real difference.

Join the efforts this fall as we present Parish Stewardship 2003. Help us make a difference in your parish community. †

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Diocesan Stewardship 2003

Stewardship – A Way of Life in the Diocese of Rockford

By David J. Hougan

Director of Office of Stewardship Development

Dates

Announcement Weekend for Diocesan Stewardship 2003 will be April 26-27, 2003. Pledge Weekend will be May 3-4, 2003. Campaign materials will be arriving at the parishes during the first week of April. Regional Training sessions were conducted in March.

Our Sunday Visitor and the Rockford Diocese

Through a special arrangement between the Diocese of Rockford and Our Sunday Visitor (OSV), the brochure titled, *What the Church teaches – Stewardship - The Catholic Way of Life* will be a significant part of Diocesan Stewardship for this year. Enough copies were ordered so that every English-speaking household in the Diocese could receive one. The brochure is intended to be used as an insert in the Pastor's Advance Letter to his parishioners. (Unfortunately, OSV does not have this brochure in Spanish.) The Stewardship Commission of the Diocese and diocesan staff will work with Spanish-speaking leadership during this year to develop a similar educational brochure in Spanish presenting the teachings of Stewardship.

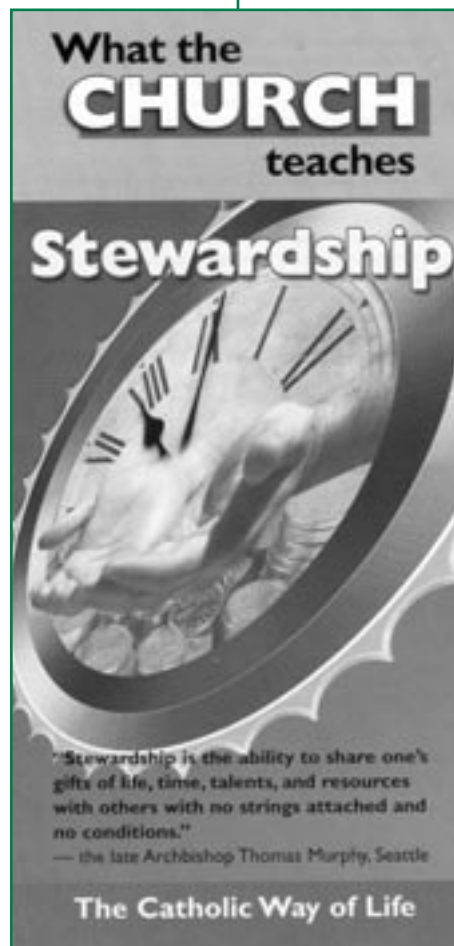
The brochure covers most of the fundamental principles that we have been emphasizing in this diocese. Stewardship is more than money; it is a way of life for a disciple of Jesus Christ. It encompasses all our actions, our skills, and our possessions. The teaching is based on our response to being loved by God as His adopted children. As children we trust in God's providence; as disciples of Christ we share our lives and possessions in the work of the Lord especially through the ministries of the Church and the Corporal and Spiritual Works of Mercy.

In the development stage of this brochure, the leadership of OSV asked the staff of the Office of Stewardship Development to provide input about its content and design. Many of our suggestions were integrated into the final document. As part of the arrangement between OSV and the Diocese, permission was granted by OSV for our diocese to use the graphic image from the cover of their brochure. This is the first and only graphic representation that we have seen that depicts time, talent and treasure in imagery. The graphic will be used on this year's poster, campaign brochure and in the Observer articles.

Budget Delay

At the time of printing the Resource Manual for Diocesan Stewardship 2003, the diocesan budget-making process has not been completed. The process, which normally concludes in mid-February, was delayed this year due to the move of the majority of diocesan offices to the Diocesan Administration Building. The new building offers the opportunity to achieve efficiencies that were not possible in the former multi-location office set-up. More time was needed to make adjustments to the budget-making process in order to incorporate new Central Services that were not available in the past, such as, one telephone system, a central mailing system and a centralized purchasing system for office supplies.

The budget process will be completed by the end of March. In early April, the diocesan budget will be submitted for consultation to the Diocesan Finance Council and Diocesan College of Consultors. Once Bishop Doran has approved a final budget, parish goals will be assigned and sent to pastors by mid-April. †



Five Reasons Why Donors Make Large Gifts to Their Church

by John Sentovich,
Director of Planned Giving

As Director of Planned Giving for the Rockford Diocese the past 5 years, I have met some incredibly generous people. These individuals — women and men, some young, but mostly elderly, some from rural backgrounds, others suburbanites, all with a variety of faith experiences and perspectives – have made financial commitments (the 5 and 6 figure kind) to their parish or school that have provided, and will continue to provide, a firm financial footing on which that Catholic institution will stand for years, perhaps generations, to come.

The type of financial commitment each has made to his or her church varies as well. Some have given a large portion of their final estate through a bequest, some have written hefty checks, others have given a piece of real estate or many shares of appreciated stock. One kind man signed over two life insurance policies because the purposes for which the policies were purchased no longer existed. He used the cash value to establish a tuition assistance endowment account in memory of his wife who taught in one of our schools.

If asked, I am sure that each donor has his or her own reason why the gift was made. Giving is a very personal decision, especially when the amount is sizeable. That is why most of these gifts described above are called planned gifts because they take time, thought, and care, along with the assistance of a professional advisor to complete. As part of the gift planning process, the gifts are structured so that they satisfy the donor's charitable intent and provide maximum long-term benefit to the parish or school.

An important question for church leaders at all levels of the diocese to consider as they do strategic planning and set future goals is this: why do people make such gifts? As I think about that question, it occurs to me – and my experience so far confirms this – that there are five reasons why Catholic donors make large gifts to their church

1. They love the Church. A recent donor study by the Robert Sharpe Company showed that the second most important aspect of a person's life is their church (behind family). For most faithful Catholics, the Church is "in their blood." They have been educated in Catholic schools, gone to church on Sunday with their family growing up, received the initiation Sacraments, been married in the Church, and buried loved ones through the ministry of the Church. The Church has been part of major life events. The deep-seated bond those experiences created endears them to the Church even in the midst of the current trials.

2. They are concerned about the future of the Church. One would have to be living in a cave for the past forty years to not know that Mass attendance is down, vocations to – and respect for – the priesthood and religious life are down, and trust in the Church's moral leadership is down. The Church that donors knew as a child has rad-

ically changed, some say for the worse. Giving is a concrete way for them to help change things for the better. It takes money to promote vocations and educate seminarians. It takes money to reach out to and evangelize fallen away Catholics (the second largest denomination in the United States!). It takes money to educate a child in a Catholic school, especially since priests and sisters no longer staff most of them. Giving can reassure donors that they are doing something tangible to promote positive change in the Church.

3. They want to teach their children about giving. Most donors know that giving too much to their children can create more problems than it solves. Sometimes a large inheritance can stifle a person's creativity as well as their drive to work hard. Donors know that hard work and discipline are what helped



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The International Catholic Stewardship Council (ICSC)

The International Catholic Stewardship Council (ICSC) "promotes the concept that stewardship is not simply an appeal for funds; it is a way of life. Through its seminars, publications and annual conference, ICSC emphasizes the point that all members of our family of faith are called to be Christian stewards and share their gifts of time, talent and treasure in proportion to the blessings they have received from God."

ICSC Sponsored Events



Annual ICSC Conference

October 5 - 8, 2003

Chicago, Illinois
Hyatt Regency

Contact our office for membership pricing

September 12 - 15, 2004

New Orleans, Louisiana
Hyatt Regency

Institute for Stewardship and Development

Summer

July 21 - 25, 2003
San Damiano Retreat Center
Danville, California

Winter

January 26 - 28, 2004
San Pedro Center
Winter Park, Florida

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them amass their net worth and the last thing they want is for it to be squandered by an inheritor's new life in the fast lane. One way donors accomplish this is by creating charitable trusts, family foundations, and in the Diocese's case, donor advised endowments in the Catholic Foundation. These giving instruments can help facilitate the family's communication about their philanthropic goals. By giving money away together, parents instill the values of generosity and compassion in their children, and children can better appreciate their parents' desire to hand on to them a healthier and financially sound Church.

4. As they age, they need a stable income. It may not be too surprising, especially given our current sluggish economy and stock market woes, but some people give to get. Certain types of giving instruments can be used not to only make a gift but also to supplement retirement income. Albeit not their primary charitable motivation, the income gifts can produce make them very attractive. For example, if a donor owns \$300,000 in appreciated stock that produces little or no dividend income, and he doesn't want to spend the value of the stock down, he can transfer that stock to the Catholic Foundation's charitable gift annuity program in exchange for fixed payments for life. The rates go as high as 11.5% depending on the person's age. These types of "life income" gifts are called "gifts that give twice," first to the donor and then to the beneficiary, normally the parish or school.

5. They want to be remembered for doing good after they are gone. This reason is where we get the phrase to "leave a legacy." There is an old joke about the bank next to the cemetery with a sign that says "You can't take it with you, but you can leave it real close." Donors know that they can't take their money with them, but they can reasonably ensure that long after they are gone, the parish will know they cared about its future. This is one of the reasons that endowment programs like our Catholic Foundation are so popular. Knowing that one's gift will never stop giving gives donors a deep sense of fulfillment.

Those are five reasons based on my experience why donors make large gifts to the Church. There are probably five more. The point is that we, as church leaders, need to understand and be aware of these reasons so that when the time comes for a gift to be made, we will have helped our donors determine why our parish deserves a meaningful share. †