

## **Goals for the Implementation of Stewardship**

Diocese of Rockford

Recommended by Diocesan Stewardship Commission

Approved on May 1, 1998

by Bishop Thomas Doran

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### **Annual Review**

### **Stewardship Commission of Diocese of Rockford**

**January 23, 2009 Meeting**

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***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 thanked those members who served their deaneries faithfully: Rev. Tom Brantman, Rockford Deanery and Rev. Sylvester Nnaso, McHenry Deanery. The new Commission member during 2008 was: Rev. Ken Stachyra, Rockford Deanery. 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 second year 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 2008. A survey was sent to each pastor seeking feedback and determining how the materials were used. As of January 2009, 19 pastors have replied. A second survey was sent out in early January to the pastors and business managers in order to update the Eight Characteristics continuum. To date, 25 responses have been returned. Results of these surveys 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, \$36,231,909 has been collected (\$121,681 in 2008). 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 \$4.5 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 and August 2008 to make critical decisions about the investment and distributions of the UIF funds. At the August meeting the Executive Committee learned that there were not any Current Earnings from the investments from the previous year. Since the PAC had been saving in Retained Earnings, the discussion focused on how much of Retained Earnings the UIF PAC should distribute. After reviewing alternative ideas, the Executive Committee decided to recommend a distribution of one-third of the Retained Earnings.

At its annual meeting in August, the full PAC authorized the distribution of one-third of the Retained Earnings in each of the UIF Endowments. From the five endowments, \$669,114 was distributed. \$205,525 was distributed from the Catholic Schools, \$102,762 Religious Education, \$63,400 Priests' Retirement, \$207,064 Seminarian Education and \$90,363 Needy Parishes and Schools .

- 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* and *Junior 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..
- F. The staff of the Office of Stewardship Development integrated themes of the diocesan centennial into their areas of responsibility. Most notably, the theme for Diocesan Stewardship 2008 focused on the gratitude for what we have received from our forefathers/mothers and whether the future generations of diocesan members will be grateful for what we have currently contributed.

***-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 two 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 2008 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 2008 five regional training sessions were conducted for Diocesan Stewardship 2008. At these meetings, the participants were asked to evaluate the Strengths, Weaknesses, Opportunities and Threats posed by the Diocesan Stewardship Appeal. This was a SWOT analysis. The aim of the exercise was to help the participants to identify both the positive and negative aspects of the appeal. They were encouraged to use this information in the presentations to the people. Attendees received information about the upcoming appeal and learned about successful strategies to promote stewardship and the participation in the appeal.
- E. In July and August 2008 Parish Stewardship training meetings were conducted in five 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 "Receiving God's Gifts Gratefully" 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 2008, three staff and 16 parish leaders attended the ICSC International Conference in Chicago. Diocesan participants were appreciative for the many and varied workshops available to deepen their skills and spirituality. The Director of Planned Giving and Director of Parish Stewardship each presented workshops. The Director of Development served on the 2008 Conference Planning Committee.
- 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: [.stewardshiprockford.org](http://stewardshiprockford.org) and [.foundationrockford.org](http://foundationrockford.org).

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

- A. Diocesan Stewardship 2008 focused on the theme "We Are Grateful For What They Did... ?Will They Be Grateful For What We Have Done?" taking the lead from the Centennial celebration of the Diocese. In the printed materials, quotes were taken from the Stewardship pastoral letter, and current and historical photos were used from around the Diocese. The video also captured the theme linking stewardship with the history of the Diocese and the Centennial celebration.
- B. In May of 2008 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.
- C. 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.

- D. 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. 76 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. 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. Despite various obstacles, overall parish ordinary income within the Diocese has increased for the 18<sup>th</sup> 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. 71 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. 43 parishes have eliminated second collections for ordinary expenses.
- D. 75 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 2008 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 2007, a 3.0% increase over the previous year, achieved 104% of its target of

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\$6,384,856. Pledges were \$6,640,758 which is \$350,505 ahead of the previous year; payments were \$233,533 ahead of the previous year. There were 161 more donors.

B. The current status of Diocesan Stewardship 2008 is at 99.1% of its goal with \$6,479,119 in pledges. Payments are keeping pace with last year at this same time. There are 53 parishes at goal by pledges. The average pledge is slightly higher than last year at \$232.65.

C. Since the inception of the Diocesan Appeal in 1975, \$111,223,000 has been pledged

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

A. 2008 National Appeal- \$539,940 (\$5,045 less) – 9,562 donors (238 less)

B. 2008 International Appeal- \$479,109 (\$16,598 less) - 8,684 donors (366 less)

C. 2008 Mission Appeal- \$473,449 (\$17,808 less) - 9,233 donors (208 less) \* nine more months remain

Collected -\$1,492,498 (\$39,451 more) from 27,479 donations (812 less) for an average gift of \$54.31.

13,937 (495 less) different donors made a gift to at least one of the appeals. This is a 13.5% participation rate for the 2008 Combined Collections.

D. Since the in the inception of Combining the Collections for the Universal Church in 1984, \$26,927,831 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. Continued distribution of monthly Planned Giving e-Newsletters which include timely Planned Giving tips for insertion into parish bulletins. Distribution stands at approximately 415. This includes all Diocesan Priests, Permanent Deacons, Parish Business Managers, and select planned giving professionals within the Diocese.

All diocesan high schools continue to participate in a planned giving/development support group facilitated by the diocesan Director of Planned Giving. Two meetings were held in 2008. 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 participation. Dr. Owen Phelps made a presentation at the last meeting on November 17 centering on ways that might be considered to increase/maintain gift receipts in this difficult economic environment by becoming more like Jesus. He also encouraged the group to think about ways that can make our donors truly wealthy.

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.

- 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, Jim Hendrix, Chairman of the Finance and Investment Committee, and the Executive Director.
- D. There are 150 registered 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" section.
- E. Every parish pastor and business manager received copies of an 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 focus on the Charitable IRA Rollover. The IRA rollover is part of the Pension Protection Act of 2006 which has been extended through Dec. 31, 2009, in the Emergency Economic Stabilization Act of 2008. The provision allows 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, one of which was for the full \$100,000 allowed.
- F. Seventeen (17) Wills Seminars were conducted at various parishes throughout the Diocese in CY2008. A total of 312 people attended the seminars, which is an average of 18 persons per seminar. 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. Two (2) new Charitable Gift Annuities were established in CY2008 totaling \$235,000.
- H. We have received 123 "check off" inquiries in CY2008 from the boxes on diocesan appeal envelopes.
- I. We received two major gifts during CY2008. One was a gift of appreciated stock valued at approximately \$3,000,000 and the other was a gift of 20 acres of land in Sugar Grove. Both of these gifts were from the same family and were restricted to form a new parish in Sugar Grove. In this regard, on November 1 the Bishop formed St. Katharine Drexel parish in Sugar Grove and appointed Fr. Robert Jones as founding pastor.

***-establish an account in the Catholic Foundation:***

- A. Eight (8) new accounts were established in the Catholic Foundation during CY2008 totaling \$876,804. Two (2) of these accounts, totaling \$503,824 were Provisional Donor Advised Funds. This year the Catholic Foundation revised the existing Donor Advised Fund, which allowed only investment earnings to be distributed (called endowed) and introduced a new Provisional Donor Advised Fund. This new Fund allows distribution of both the original gift (corpus) and earnings. The donor or an appointed advisor on these accounts can suggest periodic distributions of monies to qualified charities, half of which needs to stay within the Diocese. These Donor Advised Funds can be opened by individuals only.

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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 CY2008 were \$1,968,433. (Includes participant contributions, gift annuities and UIF deposits). We noted a significant drop in new Foundation deposits this year. The reason most commonly given us is participant desire to avoid stock market exposure. They seem to be making deposits to DIAL as an alternative.

Total assets in the Foundation as of December 31, 2008 are approximately \$53.82 million, down from \$79.16 million at the end of CY2007. This is due to losses sustained by the financial market meltdown and withdrawals from participant account retained earnings.