

PARISH STEWARDSHIP AND PLANNING IS GOOD STEWARDSHIP

THOMAS J. SMITH

DIRECTOR OF THE OFFICE OF DEVELOPMENT AND STEWARDSHIP

ARCHDIOCESE OF NEWARK

PRESENTATION AGENDA

- Opening Prayer
- Stewardship
- Parish Planning Areas
- Parish Fundraising Programs
- Closing thoughts
- Closing Prayer

STEWARDSHIP INTRODUCTION

- [Stewardship | USCCB](#) (United States Conference of Catholic Bishops)
- Stewardship is ongoing
- Discipleship is often used interchangeably with Stewardship
- Stewardship is sometimes unclear
- Stewardship is often times viewed as a “plea for money” or as a “call to ministry”

STEWARDSHIP SPIRITUAL CONTEXT

- Stewardship is comprehensive
- There is a spiritual context to fundraising
- It should be done so with:
 - An understanding of our roles and purpose
 - An invitation to support our mission
 - Gratitude and Prayer

STEWARDSHIP 4-PILLARS

- Receive God's Gift Gratefully
- Develop our Gifts Responsibly
- Share them lovingly in Justice with Others
- A Conscious Return to God with Increase

STEWARDSHIP FURTHER OUTLINED

Christian Stewardship	Giving back a percentage of our time, talent and treasure to Build up the Body of Christ.
Strength	Using our gifts and resources.
Gifts and Resources	Provide the Church with the resources to fulfill her mission.
Invitation	An opportunity in which parishioners can exercise their own stewardship by providing their Church with the resources to serve.
Confidence and Enthusiasm	Critical and helps people understand why we do what we do: For the sake of our mission and to make ministry possible!

SIX AREAS FOR PLANNING

Parishes should have a short term and long term vision for where they want to be:



Fiscally

Structurally

Spiritually

Liturgically

Ministerially

Socially

SIX AREAS FOR PLANNING IDENTIFYING YOUR NEEDS

- First you must identify your needs, fiscally:
 - Are we making budget?
 - Do we have capital needs and expenses?
 - Do we have the proper staffing?
 - What will we look like as a parish in 10yrs....what do we need to invest in?
 - Are we transparent in sharing our needs with the people?
 - If not, how can we change that?

SIX AREAS FOR PLANNING IDENTIFYING YOUR NEEDS

- Although the original plan does not need to be extensive, it is important to identify the following:
 - Why do you want to host/create a fundraising opportunity?
 - What immediate needs will this fulfill?
 - Will this opportunity interfere with other parish activities? If so, which ones and why?
 - How do you plan on making this opportunity a success?
 - Have you identified your definition of success?
 - How does this opportunity fit into your short term (2-3 yrs) and long term (5-10yrs) parish goals?

SIX AREAS OF PLANNING BEST PRACTICES

- Be Comprehensive
 - Usually if there is one need identified there are others
 - Know what is available
- Be Open
 - Consider the “ask once ask well approach”
 - Opportunity to share the history, present and future state and goals of the parish
- Utilize Archdiocesan Resources / Departments
 - i.e. Office of Development and Stewardship

PARISH FUNDRAISING PROGRAMS

- Event Fundraising
- Stewardship Initiatives
- Increased Offertory Programs
- Capital Campaigns
- Planned Giving

EVENT FUNDRAISING

- Event fundraising usually centers around the following activities:
 - Christmas Trees
 - Wine Tasting
 - Cigar Night
 - Golf Outings
 - Fashion Shows
 - Silent/Live Auctions
 - Art Auctions
 - Casino Night
 - Dinner Dance
 - 5K Race
 - Carnival/Feast
 - SCRIP
 - Raffles

EVENT FUNDRAISING PROS & CONS

PROS	CONS
Can yield \$10,000-\$50,000 worth of revenue for a parish community	Labor Intensive
Good Spirit Building Exercise	Sometimes used to fulfill a short term need on an annual budget
Can be used to build and engage new parishioners	The event doesn't always target the right demographic
Can create positive exposure for the parish community	Cost structure

Recommended Practice

- Be specific in the case/ministry/area of need the event is funding
- Create the event specific to your parish demographic(s)
- Know what the event is for thus managing expectations
- Create a committee
- Analyze the data and follow up

STEWARDSHIP INITIATIVES (ALSO KNOWN AS)

- Stewardship Campaign / Appeal
- Stewardship Program
- Stewardship Initiative
- Offertory Campaign/Program (**this is not a Stewardship Initiative)
- Preferred Name:
 - Stewardship Education and Enhancement Initiative (SEEI)

STEWARDSHIP INITIATIVE OBJECTIVES

- Provide parishes a spiritual foundation on the concepts of stewardship, discipleship and how that relates to our daily lives.
- Help parishes educate parishioners about their own talents/gifts while creating awareness of the parish mission and ministries for parishioners to become more involved in the life of the parish.
- Provide a space for parishioners to make a financial commitment to the parish and that God does have a hand in that.
- Provide parishes for annual renewal and cultivation.

STEWARDSHIP INITIATIVES DO'S & DON'TS

DO	DON'T
Choose a time to conduct it when the parish could dedicate the proper time, energy and resources to its success.	Implement a program without being able to dedicate the staff, the volunteers or the parish schedule to the effort
Fully implement each module in the program	Scale back the modules, outreach or the schedule
Ensure the Stewardship Committee is fully formed and committed	Move forward without a commitment from your committee
Conduct Annual Renewal	Make it just about the 4 months of the program

STEWARDSHIP INITIATIVE PHASES / MODULES

- Planning
- Catechetical / Spiritual
- Time & Talent
- Treasure
- ** None of the phases are effective by themselves. **

STEWARDSHIP INITIATIVE PLANNING PHASE

- 4-6 weeks
- Schedules
- Content and Materials
- ****Forming the Stewardship Committee****
 - Pastor
 - Chair Person
 - Catechetical Coordinator
 - Time/Talent Coordinator
 - Reception Coordinator
 - Ministry Fair Coordinator
 - Treasure Coordinator
 - Data Entry Coordinator
 - Marketing Coordinator
 - Renewal Coordinator

STEWARDSHIP INITIATIVE CATECHESIS

- Timeline: 4 weeks
- Messaging Vehicles / Events
 - Homilies
 - Bulletin Reflections
 - Retreat Day
 - Mailings and Digital Communication
- The Message:
 - What is stewardship?
 - God has an influence in how we use our gifts
 - Self reflection on discipleship

STEWARDSHIP INITIATIVE TIME & TALENT

- Timeline: 4 weeks
- Key Events
 - Ministry Fair
 - Receptions
 - Lay Leadership Talk
 - Historical Perspective on Ministry
- Messaging Goals
 - Enhance and grow the ministerial life of the parish
 - Invite parishioners to become ministry members

STEWARDSHIP INITIATIVE TREASURE

- Timeline: 4 weeks
- Key Events / Talks
 - Direct Mail Appeal
 - Lay Witness Talk
 - In-Pew Weekend
- Messaging Goals
 - Communicate the financial reality/state of the parish
 - To execute effective ministry, financial resources are needed
 - Greater understanding of how treasure is key to our mission
 - Offertory increase of 25% or more

STEWARDSHIP INITIATIVE FINAL THOUGHT

Annual Renewal and Ongoing Efforts make the results and impact of the Stewardship Initiative sustainable and lasting.

INCREASED OFFERTORY PROGRAM OVERVIEW

- First, a distinction must be made between Increased Offertory Programs and Stewardship Initiatives.
- Increased Offertory helps to meet immediate financial concerns with regard to the operating budget of the parish.
- The Increased Offertory program does not focus on enhancing the Spiritual Development or Ministry Efforts of the Parish.
- Within the traditional Stewardship model, an annual renewal process is implemented. This is rare in an Increased Offertory model.

INCREASED OFFERTORY PROGRAM TIMELINE / PROS & CONS

- (See Sample Timeline)

PROS	CONS (or the traps)
Quick implementation to address an operating budget need	Often too \$\$ focused and not mission focused
Parishes can see an increase of 20% in the weekly collection (1 st collection)	Does not address the entire fiscal state of the parish
Opportunity to create a case and share the local story of the parish	
Update database	
Capture other data such as: emails, cell phones etc.	
Increases online giving and envelope users	
Identify Planned Gifts	

CAPITAL CAMPAIGNS

- Capital Campaigns are oriented toward meeting the structural and fiscal needs/goals of the parish.
 - Capital maintenance and repairs
 - Renovation
 - New Buildings
 - Debt!
 - Endowment/Reserves
- Capital Campaigns should be considered once the short term capital needs/goals of the parish exceed 15% of the Annual Regular Offertory (not including Christmas, Easter or Special Collections).

CAPITAL CAMPAIGNS

- Capital Campaigns are capable of raising **1.5-2.5 times** the Regular Annual Offertory of 3 years and **3-4 times** the Regular Annual Offertory over 5 years.
 - Pledge Commitments
 - In addition to the weekly offertory
 - Payments to a pledge are tax deductible
 - Pledges can be adjusted

CAPITAL CAMPAIGNS PLANNING, ROLES & PROCESS

- Office of Development and Stewardship
 - Assist with identifying physical and fiscal needs
 - Case Statement
 - Physical Needs
 - Debt reduction/elimination
 - Meet with Finance and Pastoral Councils
 - Who will conduct the campaign?
 - Preferred Fundraising Companies (OR)
 - Office of Development and Stewardship

CAPITAL CAMPAIGNS PLANNING, ROLES & PROCESS

- Property Management
 - Site Assessments
 - Prioritize projects
 - Seek quotes
- College of Consultors
 - Approval
 - Feasibility Study (one approval)
 - Capital Campaign (separate approval)

CAPITAL CAMPAIGNS PLANNING, ROLES & PROCESS

- Just Because You Are Planning Now Does Not Mean You Are Ready to Launch Tomorrow.....
 - Almost a 9 + month process (when there are no interruptions in the timeline)
 - Site Assessments (4-8 weeks)
 - Parish Finance Council (2-4 weeks)
 - College of Consultors (2-4 Weeks)
 - Feasibility Study (2 months)
 - Capital Campaign (4-5 months of the active phase)

CAPITAL CAMPAIGNS FOUR PHASES

- Feasibility Study
- Major Gift Visitation / Receptions
- Volunteer Phase: In-Pew Solicitation & Direct Mail Appeal
- Redemption Phase

CAPITAL CAMPAIGNS

FOUR PHASES

- Feasibility Study
 - **What is it?**
 - Survey via interviews and questionnaires
 - **What is it's purpose?**
 - Tests Parishioners feelings about:
 - Parish
 - Parish Leadership
 - Case Statement
 - Giving Inclination and Capacity
 - Willingness to lead/volunteer

CAPITAL CAMPAIGNS FOUR PHASES

- Feasibility Study
 - **Identifies...**
 - Red Flags
 - Major gifts
 - Volunteers and Leadership
 - **It helps...**
 - Set the goal
 - Refine the case statement
 - **When the study is completed...**
 - Final report and recommendation
 - Decision
 - Request for Capital Campaign Approval

CAPITAL CAMPAIGN FOUR PHASES

- Major Gift Visitation / Receptions
 - 30-50% of campaign goal
- Volunteer Phase: In-Pew Solicitation & Direct Mail Appeal
 - Remainder of the parish goal
- Redemption Phase
 - 97-99% of the pledges are redeemed in 3 years
 - While the active phase requests a 10% down payment, most parishes are closer to 20% at the end of the active phase
 - Redemption Appeal (one time per year for 3 years)
 - 1x gifts \$1,000 or less
 - New parishioners
 - Those that did not make a gift

CAPITAL CAMPAIGNS FINAL THOUGHTS

- (See Sample Timeline & Budget Sheet)
- Speak to Office of Development and Stewardship
- Know the Ancillary Benefits:
 - New parishioner support (fiscal and ministerial)
 - New leadership
 - It is Stewardship – and it is Not Survival Mode
 - Have a plan to convert campaign giving into the parish offertory

PLANNED GIVING

- A Strategic Planned Giving Plan is an opportunity which every parish in every diocese should actively pursue.
- The opportunity for Wills/Estate Planning, Life Insurance, Charitable Gift Annuities, Charitable Remainder Trusts and other planned giving programs are critical to the long term success of our parishes.

CLOSING THOUGHTS

- Increased Offertory & Stewardship Initiatives
 - In many cases the Office of Development and Stewardship can facilitate these programs
 - **DO NOT ENGAGE WITH ANY VENDOR (yet)**
 - **Parish Re-Engagement & Offertory Program Presentation**
 - **May 17 & 18 at 2PM**
 - **[Memo Parish Re Engagement and Offertory Program. 01.pdf \(mcusercontent.com\)](#)**
- Capital Campaigns
 - Call the Office of Development and Stewardship first

CLOSING THOUGHTS

- **All contract and service agreements must reviewed by:**
 - RCAN Legal Department
 - RCAN Insurance Department
 - RCAN Office of Development and Stewardship
 - RCAN Parish Business Services
- **Be Comprehensive – Be Open – Use the Archdiocesan Offices**

CONTACT INFORMATION

- **Rev. Timothy Graff**
Rev.Timothy.Graff@rcan.org
- **Nancy Lystash**
nancy.lystash@rcan.org
- **Gladys Pozza**
gladys.pozza@rcan.org
- **Thomas J. Smith**
Thomas.smith@rcan.org

