

+ **PRAY FOR PRIESTS**

HEAVENLY FATHER, DURING THIS YEAR FOR PRIESTS, BLESS OUR DIOCESE WITH THE GRACE OF MANY VOCATIONS TO THE PRIESTHOOD FROM OUR PARISHES.

THROUGH THE INTERCESSION OF OUR BLESSED MOTHER, GRANT TO THOSE YOU HAVE CALLED, THE COURAGE TO FOLLOW YOUR WILL.

GRANT ALSO TO THOSE SERVING AS PRIESTS, THE GRACE TO SERVE WITH THE FAITHFULNESS OF CHRIST.

WE ASK THIS THROUGH CHRIST, OUR LORD,
AMEN

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Stewardship 101
Revenue Sources for the Parish

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Just like any other successful non-profit organization, a parish has various revenue sources to cultivate. Yet we often become caught up with raising money in just one way – usually through increased fundraising events and activities. This session explains the value of cultivating other revenue sources for the parish.

+ Luke 12:48

Much will be required of the person entrusted with much, and still more will be demanded of the person entrusted with more.



Our Parish Checklist

- Do you know all the many revenue sources that are available to a parish today?
- Do you understand why stewardship education creates a firm foundation for any other development work in the parish?
- Are you allowing fundraising activities to overwhelm your parish community, thus creating volunteer burnout and negative feelings throughout the parish?



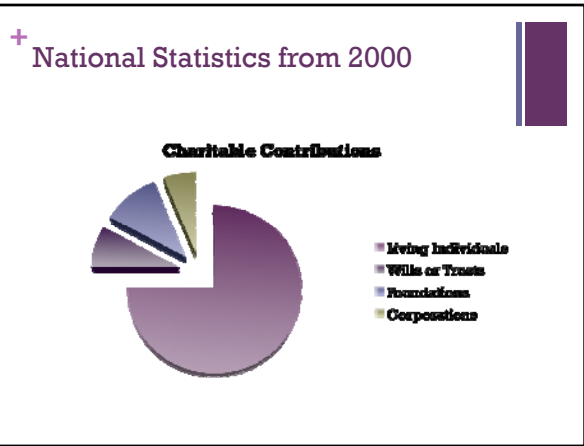
Our Parish Checklist (cont.)

- Can you immediately identify your current and potential major donors in the parish?
- Have you begun to cultivate the tremendous resources that exist through planned giving?

+ Session Outline

- Sources of Revenue
- Your Annual Stewardship Appeal
- Fundraising Activities
- Major Gifts and Capital Campaigns
- Planned Giving





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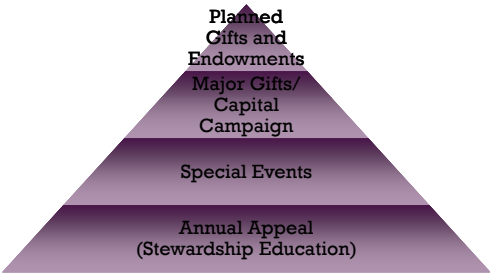
The Development Pyramid

How will individuals support your parish?



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The Stewardship & Development Pyramid




- Planned Gifts and Endowments
- Major Gifts/Capital Campaign
- Special Events
- Annual Appeal (Stewardship Education)

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A Word About The Individual Donor

People Give To People



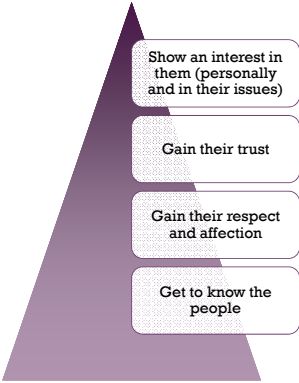
People we know

People we like or respect

+ People we trust


People who show an interest in our interests

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Want Parishioners to support your parish?
Then parish leaders need to:



- Show an interest in them (personally and in their issues)
- Gain their trust
- Gain their respect and affection
- Get to know the people

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Building Relationships



- Keep your mailing list up to date
- Keep notes and records on your parishioners
- Communicate often, well and effectively
- Take time to visit, meet and greet

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A Word About Businesses

The Big *IF*.....

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A Word About Grants

Do not waste time writing grants if the parish does not meet the qualifications

Do not use parish staff to write your grants

Do not change your mission or adopt new projects just to meet grant qualifications.

Grants will not fund operating expenses or salaries.

Carefully follow all the guidelines for preparing the application.



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ACTION STEPS

- Stop dreaming of outside support for your parish and begin to cultivate more fully the individuals who already know and support your parish.
- Examine your current sources of revenue to determine if you are receiving adequate gifts from all four levels of giving – annual stewardship appeal, fundraising activities, major gifts and planned gifts.



ACTION STEPS (cont.)

- Keep up-to-date records on all your donors, especially updating databases as needed.
- Determine if there are any businesses in your area that realistically have the potential to be a supporter of your parish.
- Make sure you are concentrating your development efforts in the areas that offer the greatest chance for success.



Your Annual Appeal



- Keep the donors you have
- Attract new donors
- Encourage all donors to increase the level of their gifts



Understanding the Stewardship Appeal

- The Benefits of Stewardship Education
 - Financial giving increases anywhere from 10-20%
 - Giving level not only maintains but continues to increase
 - More parishioners come forward to offer gifts of time and talent
 - Parish becomes more vibrant and exciting
 - The individual faith life of parishioners is enriched



CONDUCTING SUCCESSFUL STEWARDSHIP EDUCATION



- The letter from the pastor
- A Stewardship Brochure
- An Intention Card
- Lay Witness Talks
- Ministry Fair
- Telephone Follow-Up



Making the Most of Your Offertory and Stewardship Appeal



- Plan to annually ask your parishioners to make or increase their Offertory gift.
- As part of your appeal process send a letter, brochure and intention card to the home.
- Segment your appeal as much as possible.



Making the Most of Your Offertory and Stewardship Appeal (cont.)



- Understand that stewardship calls for a total gift of self.
- Be prepared to accept the gifts of time and talent that parishioners offer.
- Model good stewardship by being very grateful

+ Making the Most of Your Offertory and Stewardship Appeal

- Annual renewal is critical.
- Realize that even an annual appeal is not enough to counter the endless temptations that are presented on a daily basis by our materialistic and commercial society.

+ Making the Most of Your Offertory and Stewardship Appeal (cont.)

- Work with your liturgy committee to give special emphasis to your Offertory.
- Be accountable to your parishioners for the stewardship gifts they do give.
- Keep stewardship alive throughout the year by keeping your stewardship education committee active all year.

+ ACTION STEPS

- Realize that the primary support for your regular parish operating expenses must come from your weekly Offertory.
- Constantly teach Stewardship! Stewardship is not a "once a year" appeal. It is a way of life!
- If your parish does not conduct an annual stewardship appeal contact the Office of Stewardship (602) 354-2218 for help in determining the best approach for your parish.



ACTION STEPS (cont.)

- Use weekly stewardship bulletin reflections, homilies, pastor's columns to help support your parishioners live as stewards.
- Work with your Liturgy Committee to put renewed emphasis on your weekly Offertory.



What Are Fundraising Activities?

- Events
- Sales
- Collections



The Value of Fundraising Activities

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The Pitfalls of Fundraising Activities

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Controlling Your Fundraising Activities

Determine if all of the fundraising really fits into your mission.

Every idea that comes up in a parish community is not necessarily worth funding.

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ACTION STEPS

- Make an assessment of all your parish fundraising activities and determine if you are wearing out your parishioners with endless little appeals.
- Establish a set of criteria or guidelines to use in judging all fundraising activities.



ACTION STEPS (cont.)

- Eliminate fundraising activities that do not meet your parish's established criteria or guidelines and judge all future fundraising proposals against these same criteria.
- Brainstorm to see if your parish could benefit from a fresh new fundraising idea that meets the guidelines established by the committee and could replace old and tiresome activities.



Major Gifts and Capital Campaigns

What To Do When The Need Is Overwhelming



What kind of need do you have?

- Is it operational?
- Is it an emergency expense or single project expense?
- Is it a huge renovation, remodeling or expansion that will not only require upfront capital but also have an impact on future budgets because of expanding maintenance and staff requirements?

+ KNOW YOUR MAJOR DONORS

- Know who your real major donors are.
- Determine who your potential major donors might be.
- Get to know your real and potential major donors well.
- Cultivate them.
- If they show interest, involve them in the leadership roles in the parish.

+ CONDUCTING A FEASIBILITY STUDY

- Does your parish have the staff and volunteer resources needed to successfully carry out a capital campaign?
- Are your donor records in good shape for conducting a capital campaign?
- Do you have a need that donors will support?

+ CONDUCTING A FEASIBILITY STUDY (cont.)

- Do the donors understand the need or is more education necessary?
- Do the donors have the ability to make the kinds of gifts you will need to meet your goal?
- Does the parish have the other ingredients often needed for a successful campaign – good image, trust in leadership, open and effective communication?

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CONDUCTING A CAPITAL CAMPAIGN

Benefits of a Capital Campaign

- Unites the parish community around a common goal
- Increased understanding & awareness of the parish mission
- Parishioners are excited and motivated by growth
- Parish concentrates its efforts on other aspects of the mission

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CONDUCTING A CAPITAL CAMPAIGN

Benefits of a Capital Campaign (cont.)

- Overall development efforts becomes more organized
- A “can do” attitude tends to energize the parish community
- Donors realize that they really can do more.
- The entire parish is reinvigorated

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ACTION STEPS

- Identify and track your major donors and your potential major donors.
- Determine ways to get your donors more involved in your parish. Visit, learn what matters, involve them in parish life.
- Conduct preliminary needs assessment to determine overall parish needs.



ACTION STEPS (cont.)

- Do not attempt a capital campaign without a feasibility study.
- Seek professional counsel before starting any stage of a capital campaign.





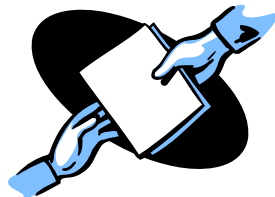
Planned Giving

The highest level on the development pyramid



The Benefits:

For Your Parish
For Your Donors



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The Forms of Planned Giving

- Wills or Trusts
- Charitable gift annuities
- Charitable remainder trusts
- Real Estate
- Life Insurance Policies
- Stocks, bonds or mutual funds
- IRA's and retirement funds
- Donor advised funds

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Establishing an Endowment

The first step in securing more planned gifts...

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Promoting Planned Giving in Your Parish

- Anyone over the age of 55
- Individuals in leadership positions in your parish
- Widows and Widowers
- Established Individuals

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A WORD ABOUT WILLS AND TRUSTS



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ACTION STEPS

- Realize that planned gifts are quickly becoming essential to long term planning of many parish communities
- Do not delay in beginning a planned gift program
- Call the Catholic Community Foundation to better understand planned giving (602) 354-2400
- Establish a Parish Endowment

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ACTION STEPS (cont.)

- Establish a plan for promoting planned giving in your parish
- Hold a Wills and Trust Planning Seminar
- Determine the best way to recognize planned givers to your parish.



STEWARDSHIP 101 SESSION 6 Recognition of Donors



- April 7th St. Thomas Aquinas, Avondale
- April 21st Our Lady of Mount Carmel, Tempe
- April 28th St. Paul, Phoenix

All Sessions

7:00 pm – 8:30 pm