



DIOCESE OF CHARLOTTE PASTORAL CENTER
OFFICE OF DEVELOPMENT
www.charlottediocese.org

Memorandum

TO: Pastors and Parish Administrators

FROM: Jim Kelley, Director of Development

DATE: January 31, 2017

RE: Update on the services provided by the Office of Development

CC: Parochial Vicars, Parish Financial Contacts, Pastoral Council and Finance Council Chairpersons

I am writing to provide information on the services available through the diocesan Office of Development. As most of you know, the Office of Development exists to serve the parishes, agencies and ministries of the diocese in their stewardship and development efforts. We want you to be aware of services we can offer your parish.

Members of our office are meeting with parish, school and agency leaders over 160 nights a year. We were out in parishes, schools and agencies 19 times this month alone. Over the last 10 years, we have visited all 92 parishes/missions, some more than 50 times and others once or twice. We receive many calls for assistance and continue to respond to those calls in a timely manner. We are here to provide assistance to you and your parish in the following ways:

- Promoting **stewardship** as a way of life throughout the diocese is a priority for our office. We regularly meet with pastoral councils and/or stewardship committees to help them organize or improve their stewardship efforts. In the past year, Kerry Ann Tornesello has worked with 15 parishes on their stewardship efforts. If you would like her to meet with you and/or your parish leaders about forming a stewardship committee or enhancing your stewardship efforts, please contact her. We are also organizing a diocesan stewardship conference on March 25, 2017 at St. Aloysius parish in Hickory. We highly encourage you and your parish leaders to attend. Registration brochures have been sent to you via USPS and email.
- The annual **DSA** is the largest initiative coordinated through our office. For the past 3 years, in January, Kerry Ann Tornesello has hosted DSA kick-off meetings throughout the diocese. Parishes that attend these meetings and follow the plan that is laid out, are much more successful in reaching their DSA goals. In addition to the meetings and weekly email updates with pointers on how to promote the DSA throughout the year, we can work individually with parishes to reach or surpass their DSA goals. Contact Kerry if you would like this customized service.
- As you know, we regularly use *The Catholic News & Herald* and other mailings to **encourage parishioners to remember their church in their wills and estate plans**. Our office receives calls from several parishioners each week regarding their estate plans, and we encourage them to think about their parish first. We have worked with over **900 individuals** in 73 of our 92 parishes and missions. National research tells us for every person who notifies an entity of his or her intentions there are seven who do not but still have committed an estate gift to that entity. This means we could have as many as 6,000 people who have remembered the Church. We will continue our efforts in this area.
- Over the years, more than 60 of our parishes have conducted **estate planning seminars**. Currently 69 of our parishes have at least one endowment in the **diocesan foundation**, which currently totals over \$40 million

in assets. Thirty one of our parishes have multiple endowments. In fact, several of our parishes have over \$1 million in their endowments. One more parish established an **endowment** this month. In addition, over \$7 million in income has been given to parishes, schools and agencies from the endowments in the foundation. Just last month, three parishes and a parish school received gifts establishing four new endowments, one for \$3.6 million, one for \$400,000, one for \$250,000 and another for \$48,000. If you reach out in an organized way to your parishioners, more of them will leave estate gifts or establish endowments for your parish. If you would like more information on estate planning seminars and endowments, please contact Ray-Eric Correia.

- Our office is developing a planned giving initiative that focuses on organizing parish planned giving committees. Research from other Catholic dioceses in the U.S. directly links increases in planned gifts being left to parishes to having active **parish based planned giving committees**. Our hope is to foster a culture of planned giving in the parishes where more parishioners designate a gift at death to the Church, specifically your parish. If you would like more information on this initiative, please contact Ray-Eric Correia.
- Initial pledges for the **FFHL campaign** were \$67,704,000 over a five year period. Most donors have completed 50% of their pledge period. (2 ½ years of a 5 year pledge). Payments received through December 31, 2016 are \$36,645,000. Most donors are current with payments on their FFHL pledges. For those who are behind in payments or who have paid nothing, we have been following up with those donors with reminder inserts, letters and phone calls. What has been most effective in following up with donors, however, has been letters and calls from parish staff or parish volunteers. If you would like more information on how to conduct parish follow-up on FFHL, please contact me.
- Over the years, the development office had completed 163 **capital campaigns**. Sixty-eight of our parishes have conducted capital campaigns, 43 of which have conducted multiple campaigns in response to growth. Parishes can begin planning capital campaigns for late 2018 or early 2019. If you are considering a parish capital campaign after the completion of the FFHL campaign, please contact me.
- The purpose of the **Priests' Retirement and Benefits second collection** in September of each year is to help parishes raise some of the funds that they have been assessed for these plans. This one-weekend second collection was never intended to be the sole source of income for this assessment. If you would like to consider additional strategies to collect donations for this assessment, please contact Kerry Ann Tornesello.
- Each Spring, the Chancery approves the following year's **second collections** schedule. This schedule is given to our office, posted on the diocesan website (under "Ways to Give") and sent to all parishes to give to your collection envelope companies. If you have any questions about the second collection schedule, please contact Kerry Ann Tornesello.

We are here to serve you and your faith community. If you find that you are in need of any of our services, please give us a call or visit our website at www.charlottediocese.org.

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