



Campaign Policies

1. **Full Participation** – Every Latin Rite Catholic parish listed under the Archdiocese of Milwaukee in the 2021 Wisconsin Pastoral Handbook will participate in the Love One Another Campaign (“Campaign”).
2. **Financial Goals** – Every parish will have a financial goal. The goals are not mandatory assessments.
3. **Parish Goal Formula** – All goals will be determined by a common formula using recorded financial information from fiscal year 2018-2019 regardless of the year of the assigned wave. Each parish goal will be set at 140% of ordinary income (acct. #3010 and #3020, respectively from the Parish Confidential Financial Statement as approved by the office of Parish Finance).
4. **Parish Share** – Each parish will receive 60% of what is raised from its parishioners to be allocated to its own local case for support up to the parish goal. All parish distributions will be done on the basis of cash received. Each parish will receive 80% of what is raised from parishioners beyond the parish target, up to 125% over goal and then 100% thereafter.

EXAMPLE: St. Sample Parish has a goal of \$900,000 and raises a total of \$1,500,000
 Parish retains 60% of funds raised up to the goal: $\$900,000 \times 60\% = \$540,000$

Parish retains 80% of funds raised between goal and 125% of goal: $\$1,125,000$ (125% of goal)
 - $\underline{\$900,000}$ (goal)
 $\$225,000 \times 80\% = \$180,000$

Parish retains all funds raised beyond 125% of goal: $\$1,500,000$ (total raised)
 - $\underline{\$1,125,000}$ (125% of goal)
 $\$375,000$

Total funds retained by parish in this example: $\$540,000$ (60% of goal)
 + $\$180,000$ (80% of funds between goal and 125% of goal)
 + $\underline{\$375,000}$ (100% of funds after 125% of goal)
 $\$1,095,000$

5. **Parish Share Disbursement** – The Parish Share (60%) will be allocated to the Trust upon receipt from the donor. The parish will receive its disbursement of funds on a quarterly basis within 30-45 days of the end of each quarter. The first disbursement will occur within 30-45 days of the completion of the active 6 month fundraising period. Parishes are required to establish and maintain a restricted bank account for receipt of these funds. The parish funds are not subject to the annual archdiocesan assessment.
6. **Donor Restricted Giving** – Donors may restrict their gifts to one or more of the Campaign case elements. In the case of full restriction to the parish case, however, the overall split of 60% parish – 40% non-parish initiatives of the Trust will be honored by re-designation of the total of non-restricted gifts (For the purpose of the Campaign, “non-restricted” indicates gifts that are not restricted to a specific case element). The parish will provide documentation on any donor restricted gifts and pledges. It is understood donor intent is primary.

EXAMPLE: St. Sample parish has a goal of \$100,000 and receives a \$5,000 gift that is restricted to the parish. The entire \$5,000 will be distributed to the parish as it is paid. At the end of parish’s active participation in the Campaign, distribution of the cumulative total amount will be adjusted to meet the established sharing goals. The parish would receive 60% of the total with 40% funding the non-parish

initiatives of the Trust.

7. **Priest/Parish Director Gifts** – All priests and Parish Directors will be encouraged to participate in the Campaign at a meaningful level. A clergy member's or parish director's Campaign pledge will be credited to the parish, parishes, or ministry he/she designates.
8. **Lead Gifts** – For gifts solicited by Archbishop ListECKI, his selected committees or representatives, the donor's parish will receive 15% of the gift up to a parish share cap of \$150,000 unless otherwise specified by the donor.
9. **Allocation of Funds to Trust initiatives** – Funds received will be allocated to the various case elements according to their fundraising target in proportion to the total goal. Funds raised in excess of the \$150 million Campaign goal will be allocated to existing case element(s) at the discretion of the Archbishop and trustees.
10. **Goal Appeal Process** – Pastors/Parish Directors will have the opportunity to have their goals reviewed by the Priest/Parish Director Advisory Council. The Priest/Parish Director Advisory Council will require a written appeal and establish a deadline for goal appeals. They will then review appeals and make recommendations to Archbishop ListECKI. Common reasons for a request to appeal the Campaign goal include:
 - a. The passing (or moving) of a donor who contributed a significant percentage of the parish's offertory
 - b. A one-year offertory increase based on a significant one-time contribution
 - c. Extreme financial strain on the parish due to unforeseen emergency expenditures such as flooding, a collapsed roof, etc.
11. **Sharing Formula Appeals** – All parishes will participate in the Campaign according to the policies and guidelines set forth. Special needs consideration may be granted only in extreme circumstances.

EXAMPLE: A parish whose financial stability would be jeopardized without additional funds beyond what will be realized through the standard sharing formula.

Parishes must evaluate participation and pledges received before requesting special consideration.

If a parish believes that it meets the criteria outlined above, it must contact the Priest/ Parish Director Advisory Committee in writing with a detailed explanation of the nature and rationale of the proposed special consideration.

The Pastor/Parish Director Committee shall make a recommendation regarding such requests to the trustees of the *Love One Another* Trust, whose action on the recommendation shall be final.
12. **Campaign Waves** – The Campaign will be conducted in phases. The Leadership Gifts Phase will take place throughout the Campaign. The Pilot Wave is scheduled to take place between July and December 2021 followed by Waves 1, 2 and 3 in six-month increments. The Wave schedule is subject to change. Two months of Campaign preparation precedes each Wave.
13. **Pastor/Parish Director Leadership** – The Pastor/Parish Director of each parish will accept the responsibility to lead the Campaign in the parish/parishes, utilize the support provided by the Campaign office, and implement the Campaign plan in good faith. Every parish must include lay leadership in its Campaign organization. Pastors/Parish Directors will be asked to recruit a volunteer committee to assist with the implementation of the Campaign.
14. **Stewardship** – At the beginning of each Wave, parishes in that Wave will participate in a 6-week

focused process that will reinforce the spirituality of stewardship.

15. **Parish Case Statements** – Each parish will prepare a written Case Statement identifying the use of its share of funds. Assistance can be provided by the Campaign Office. Campaign funds cannot be assigned or allocated to parish operations, including the establishment of new staff positions. Prior to publication of parish-specific materials, Case Statements must be submitted for review as part of the proxy request to begin the Campaign. Proxy requests should be submitted to the Chancery Office.
16. **Gift Processing** – During the active phase of the Campaign, defined as the Pilot Phase, Wave 1, Wave 2 or Wave 3, the parish will be asked to mail gifts and pledges to a Campaign-designated lockbox for gift processing and accounting.
17. **Gift Documentation** – Gifts and pledges must be documented in writing by a signed pledge card to be counted in the Campaign totals.
18. **Gift Acknowledgement** – The Campaign office will acknowledge all gifts and pledges and provide tax receipts. Parishes are encouraged to thank parishioners who make Campaign gifts and pledges.
19. **Pledge Collecting, Reminders and Remittances** – After the initial solicitation and collection of pledge forms at the parish level, the Campaign office will administer pledge follow-up. Donors will be given the option of making payments annually, quarterly, or monthly. Parishes will receive monthly reports documenting the status of donors' accounts.
20. **Gift Crediting for Gifts of Stock** – Gifts of stock will be sold as soon as possible upon receipt by the Trust. Donors of stock will receive credit for their gift based on the average of the high and low value of the shares on the day the shares are received by the Trust. The Trust will liquidate the shares as soon as possible and credit the Campaign with the net of the sale, minus brokerage fees.
21. **Campaign Costs** – Parishes conducting the Campaign will not incur the cost of professional counsel, print material, mailings (including special appreciation) or pledge fulfillment involved in the Campaign plan. The cost of the Campaign will be paid from the Trust's share. Parishes will be asked to cover costs associated with local parish Campaign meetings, such as refreshments and meeting facilities, as well as locally produced bulletin inserts promoting the Campaign.
22. **Extended Goal Parish Campaigns** – If a parish wishes to pursue a goal of 2x offertory or more, the parish shall:
 - a. Request approval from the Archbishop.
 - b. Strongly consider a feasibility study with approved fundraising counsel **(for parishes seeking 3x annual offertory or higher)**
 - c. Sign a Memo of Understanding including (Pastor/Parish Director and Parish trustees) committing to the 40% share of its original Campaign goal in exchange for receipt of all additional funds.
 - d. Parishes that conduct an approved Extended Goal Campaign must discuss Campaign support with Andy Gaertner so that appropriate arrangements can be made.

The Campaign office will administer the pledge fulfillment process for all Extended Goal Parish Campaigns at no cost to the parish.
23. **Amendment or Changes to the Parish Case Statements** – If for some extraordinary reason, the local Case Statement would need to change, the parish must implement the following steps to officially make a change:

- a. Contact the Director of Development, Andy Gaertner, to explain the rationale for the change and work together to implement the remaining steps.
- b. Draft a new local Case Statement including background regarding the reason for the change and including any research to support the positive impact of making the change.
- c. The change to a local Case Statement must be submitted to and approved by the parish Finance and Pastoral Councils.
- d. The proposed amended Case Statement must be submitted to the Archbishop through the proxy process.
- e. Once the Archbishop has approved the amended Case Statement through the proxy process, the parish must present the background, research and process taken to recommend the changes to the parish in the form of a bulletin insert, a town hall style meeting, and a presentation of the change at all Masses on a designated weekend.
- f. Donors may stop payment on a gift, but no refunds will be provided from the non-parish initiatives of the Trust. The parish, however, can elect to provide refunds to individuals for the parish share of their commitment.

24. **Proxy to Participate in the Campaign** – Every parish must obtain a proxy to participate in the Campaign. The proxy requests must include the parish’s Case Statement. These proxies will be issued to parishes based on the timelines for Wave participation.

25. **Proxy to Spend Proceeds** – At the time a parish chooses to spend Campaign proceeds according to its previously established case, the parish must request a Proxy from the Chancery Office approving funds be moved from the parish’s restricted account. Proxy approval is required regardless of the dollar amount to be spent. If Campaign funds are to be spent on a building project, established Building Commission process and procedures must be followed.

Policies reviewed by the Pastors/Parish Directors Advisory Council October 15, 2019

Pastors / Parish Directors Advisory Council

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| Archbishop Jerome Listeck | Father Matthew Widder |
| Bishop James Schuerman | Father Dennis Wieland |
| Father David Reith | Father Anthony Zimmer |
| Father Kenneth Omernick | |
| Father Phillip Bogacki | |
| Mr. Christopher Brown | |
| Father Patrick Burns | |
| Father Javier Bustos-Lopez | |
| Ms. Brenda Cline | |
| Dr. Barbara Anne Cusack | |
| Father Jerome Herda | |
| Father Ricardo Martin-Pinillos | |
| Father Brian Mason | |
| Father Mark Payne | |
| Father Nathan Reesman | |
| Father Oriol Regales | |
| Father James Volkert | |
| Father Robert Weighner | |