



Serving the Catholic Community of Southeastern Wisconsin

## Parish Administrative Guide



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# Introduction: Role of Parish Administrator

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This guide has been created as an informational tool for parish administrators and other parish staff supporting the Love One Another Campaign.

All 188 parishes in the Archdiocese of Milwaukee will be participating in the Love One Another Campaign. There will be four 'waves' to the campaign, including the pilot wave with 10 parishes. Each 'wave' is a 25-week period in which the participating parishes will be assigned a parish campaign director to guide the parish through their active campaigning period. The parish administrator plays a vital role in the success of the parish campaign. Your participation and commitment to the campaign will encourage other parish staff, volunteers and parishioners to support this ambitious effort.

## **Qualifications of parish administrator:**

1. Knows the members/culture of the parish well.
2. Is supportive of the campaign and parish needs.
3. Is willing to make their own best pledge to the campaign.

## **Responsibilities of parish secretary:**

1. Helping update the parish roster.
2. Recording pledges in accordance with campaign procedures.
3. Coordinating the creation of campaign materials with the parish campaign director for personal visits, volunteer recruitment, volunteer training and campaign mailings.
4. Support the Pastor, Parish Director, Associate Pastor, and Volunteer Campaign Leaders in their roles and responsibilities.



# Campaign Preparation Steps

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*Purpose: This is the first step to beginning the creation of custom campaign materials. Updated Parish Rosters and Offertory will help ensure that all campaign communications, gift acknowledgements and receipts, and future communications are properly delivered.*

Several months prior to your parish campaign, [parishupdates@archmil.org](mailto:parishupdates@archmil.org) will send you a digital roster of your parishioners. This must be updated prior to the launch of the campaign as noted in the instructions provided.

**Please note: Archbishop ListECKi has asked your pastor to submit a parish roster with updated contact information and 2020 and 2021 offertory data by household.** The offertory data you provide will only be used to create materials to conduct the campaign in your parish. It will be **treated with complete confidentiality**. The contact information will be used to update the database at the Archdiocese of Milwaukee. All offertory information is used solely for campaign organization in your parish and is not retained.

Neither the development office of the Archdiocese nor anyone else will retain the data or use it for any other purpose. If you have a concern, please contact Andy Gaertner directly at 414-769-3322.



IMPORTANT

# Process for Updating Parish Roster

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## 1. UPDATE ROSTER

Please make changes and updates **according to the instructions sent by [parishupdates@archmil.org](mailto:parishupdates@archmil.org) (below):**

To update this roster please look over the list of parishioners we show registered at your parish and use the appropriate change code (listing on next page) in the first column of the roster (Change type) for any records that require updating. **Please use the codes so we can easily see which records you have changed.** You can then make the changes by typing the correct information directly over the incorrect information on the excel spreadsheet. **If there is no code in the first column, we will assume the information is accurate and no changes need to be made to that record.** All new additions can be inserted into the correct location on the excel spreadsheet. Please use an "A" in the change column to indicate addition. Please return updated parish rosters to [parishupdates@archmil.org](mailto:parishupdates@archmil.org).

## 2. PROVIDE OFFERTORY DATA

Using your computer, **kindly type the offertory data** for each parish household directly into the final column of the roster provided. Please do not handwrite the data.

Please **return (send the digital copy of) the roster with the offertory data, to [parishupdates@archmil.org](mailto:parishupdates@archmil.org) no later than 3 months before your campaign start date.**

*Please note: Throughout the campaign, there will be several mailings sent by the Archdiocese. To ensure that all parishioners are included in these mailings, please work with your parish campaign director to establish deadlines to submit final roster changes before each mailing.*

## Updating Parish Roster: Continued

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### UPDATE CODES

<i><b>CODE</b></i>	<i><b>DESCRIPTION</b></i>
A	New Addition to Parish (note any past parish/address, if known)
CN	Change to name
CA	Change to address (include previous address)
CP	Change to phone
CM	Change – Marriage (include date and wife’s maiden name, if known)
CD	Change – Divorce (indicate which spouse remains in your parish)
DOB	Add or correction to birthday (mm/dd/yy)
EML	Add or correction to email
LP	Left Parish (note new parish, if known)
DM	Deceased Male (mm/dd/yy)
DF	Deceased Female (mm/dd/yy)
M	REMOVE from Parish - moved out of diocese or out of state (list new address, if known)
O	Other – provide reason for change
DNS	Parishioner requests no solicitation



## Instructions for Pulling Parish Offertory and Roster Records

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Please note that it may be necessary to run two reports to pull the needed information.

1. Report #1, the comparison of yearly totals report will provide the past three years of giving history. Please select the last two years of complete giving history (2020 & 2021).
2. Report #2, the demographics report will provide parishioners' roster information. The data fields below are to be included in Report #2.
3. If possible, please combine the reports into one file

**Report Fields:**

Raiser's Edge ID (REID)

Title

Last Name

First Name

Suffix

Spouse First Name

Spouse Last Name

Formal Salutation

Informal Salutation

Street Address Line 1

Street Address Line 2

City

State

Zip

Telephones (please include all phone fields)

Email Addresses (please include all email addresses)

Offertory 2021

Offertory 2020

Offertory 2019

Spanish – Identify if English is not their 1<sup>st</sup> Language



**IMPORTANT**

## Pledge Handling and Processing Procedures

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***Purpose:** Please follow these steps when handling gifts and pledges at the parish. This will help gift and pledge information remain confidential, create a paper trail, and ensure timely gift acknowledgement letters and payment reminders. Thank you.*

**Please note:** to ensure timely deposits of checks and gift acknowledgements, **please follow this process within 24 hours of receiving gifts and pledges at the parish** as needed throughout the course of the parish campaign: **Two parish members must be present** whenever campaign pledge forms, checks, or cash are handled.

**1. Pledges will arrive at the parish in 1 of 5 ways:**

1. Pastor receives the pledges at the weekly volunteer report meeting and turns over to the designated pledge processing staff.
2. Parishioners place pledges in offertory basket (typically during the public phase).
3. Parish campaign volunteers walk in and hand pledge to front desk staff.
4. Parishioners walk in and hand pledge to front desk staff.
5. Parishioners mail pledge into the parish office.

**2. Pledge processors will open envelopes and make two (2) photocopies of the pledge document, checks or other attachments enclosed:**

1. The first copy is to be kept in a secure location for parish records.
2. The second copy is to be given to your parish campaign director.
3. Please return items to their original envelopes after removing them to make copies.

**3. Pledge processors will place all pledges, checks, and other attachments in one of the two (2) pre-addressed TYVEK envelopes provided and mail with proper postage affixed:**

1. The smaller envelope can hold up to 5 pledges.
2. The larger envelope can hold up to 30 pledges.

Please note pledges and checks will be processed by US Bank and recorded at the Archdiocese for acknowledgement and fulfillment. This process can take from 10 to 20 days.\*\*\*

**IMPORTANT:** the process is different for mailing in-pew envelopes received during Masses the end of the parish campaign. In-pew envelopes are not to be opened at the parish. A special TYVEK envelope will be provided in which to mail all in-pew envelopes received by the parish. Thank you!

# SAMPLE PLEDGE CARD (ALL REQUEST LEVELS)



Total Pledge: Ex. \$25,000 (Total, over 5 years)

Initial Payment: \$ \$2,500 (10%) Balance: \$ \$22,500

Payments to be made (check one): ☒ Monthly ☐ Quarterly

☐ Semi-Annually ☐ Annually

☐ Other \_\_\_\_\_

Beginning on (date): 1/15/2022

Payment information on back

<NAME>

<ADDRESS>

<CITY>, <STATE> <ZIP>

<CONTACT INFORMATION>

Archdiocese of Milwaukee  
Love One Another Appeal Campaign  
Box 78496  
Milwaukee, WI 53278-8496

## Payment Options

☐ Credit Card:

☐ Visa ☐ Mastercard ☐ AmEx ☐ Discover

Account Number:

Exp. Date: \_\_\_\_\_

☐ Check (Payable to Love One Another Campaign, reminders will be mailed)

☒ Electronic Funds Transfer/Automatic Withdrawal

Electronically transfer \$ \$375 per month, for 60 months

Make this electronic transfer on the X 5th or \_\_\_\_\_ 20th of each month from:

☒ Checking Account (must enclose a voided check)

☐ Savings Account (must enclose a savings deposit slip)

Name on Account John Smith

Daytime Phone 262-222-6622

Email johnsmith@gmail.com

Signature John Smith

\*IMPORTANT: Please place in envelope provided, and seal.

# SAMPLE MAJOR GIFTS PLEDGE FORM

In support of Archbishop Jerome ListECKi and his commitment to preparing for the future, I/we wish to make a commitment to the Love One Another Campaign. My/Our pledge will benefit my/our parish and the ministries of the Roman Catholic Church of Southeastern Wisconsin.

## Donor Information

Name/Names: Johnnyppleseed  
Your Parish Name & City: St. John the Evangelist, Milwaukee  
Your Street Address: 400 N. Water St  
City, State Zip code: Milwaukee, WI, 53202  
Daytime Telephone: (123) 456-7890  
Email: johnny.appleseed@abcde.com

I/we pledge my/our support with the following gift/pledge: \$ 100,000 Total Pledge Amount

It is my/our intention to fulfill this pledge over 60 months, OR 5 years, with payments due:

☒ Monthly ☐ Annually ☐ Quarterly ☐ Other: \_\_\_\_\_

The date my/our first pledge payment will be made is: August 13, 2021

## Payment Options

☐ Check (Payable to Love One Another Campaign, reminders will be mailed)

### ☒ Credit Card:

☒ Visa ☐ Mastercard ☐ AmEx ☐ Discover

Account Number:

5100 1234 5678 9010

Exp. Date: 08/21

### ☒ Electronic Funds Transfer/Automatic Withdrawal

Electronically transfer \$ 1666.67 per month, for 60 months

Make this electronic transfer on the \_\_\_ 5th or ☒ 20th of each month from:

☒ Checking Account (must enclose a voided check)

☐ Savings Account (must enclose a savings deposit slip)

Name on Account Johnny Appleseed

Signature: Johnny Appleseed Date: August 13, 2021

For stock transfer information, IRA contribution information, or questions concerning a pledge or a gift, please contact Bob Pfundstein at (414) 769-3583 or by email at [pfundsteinb@archmil.org](mailto:pfundsteinb@archmil.org).

**Thank you for your support!**

# SAMPLE IN-PEW PLEDGE CARD

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THE CATHOLIC CAMPAIGN

Love One Another Campaign  
Box 78496  
Milwaukee, WI 53278-8496



Place  
Stamp  
Here

Please check your response below and provide the requested personal information (please print).

☒ Yes! I/We pledge a total of \$ 12,000

I/We will make: ☒ 60 monthly payments ☐ 5 yearly payments

☐ Other \_\_\_\_\_

☐ Amen! I/We already pledged.

☐ I/We will pray for success.

## Pledge Examples

Total Pledge	60 Months	5 Years
\$12,000	\$200	\$2,400
\$9,000	\$150	\$1,800
\$6,000	\$100	\$1,200
\$3,000	\$50	\$600
\$1,800	\$30	\$360

Parish St. John City Milwaukee

Name(s) John Smith

Address 123 Way Rd. City Milwaukee State WI Zip 53202

Cell Phone 202-283-9238 Email john123@gmail.com



## Thank You Letters From the Parish

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***Purpose:*** *It is important to send a personalized thank you letter from the parish after a pledge has been made. This acknowledgement from the pastor/parish builds strong relationships with those supporting the campaign.*

- All Love One Another Campaign donors will receive acknowledgement letters and pledge fulfillment reminders from the Archdiocese. A parish acknowledgement letter is optional but recommended.
- Please work with your parish campaign director to create and mail these letters to donors who have pledged \$5,000+ at the end of the active campaigning period (after your in-pew appeal pledges have all been processed).

*See next page for an example parish acknowledgment letter.*

## Parish Letterhead

### Optional Letter Prepared and Mailed by Parish to Campaign Donor Families

**Please note the Archdiocese will mail all donors acknowledgement letters.**

[DATE]

[FORMAL SALUTATION]

[STREET ADDRESS]

[CITY], [STATE] [ZIP]

Dear [INFORMAL SALUTATION],

On behalf of [PARISH], I want to thank you for your pledge of [\$ PLEDGE AMOUNT] to the Love One Another Campaign.

You are joining many other parish families to help meet pressing needs at our parish and support important ministries. Together we are preparing for the next generation of Catholics across our 10 counties of southeastern Wisconsin.

May God bless you and your loved ones abundantly.

Sincerely yours in Christ,

[PASTOR SIGNATURE]

[PASTOR NAME]

**\*\*This letter is optional, as a letter will be sent automatically by the Archdiocese.\*\***



## Media in the Public Phase

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***Purpose:** It is important to keep parishioners up-to-date on the progress of the campaign. The best way to do so is through multiple avenues of communication. Social media is very important to keep all parishioners engaged in the campaign.*

- In advance of and throughout the course of the public phase, your Parish Campaign Director will work with you to use social media to promote the campaign.
- Please share with your Parish Campaign Director the contact information of the person in charge of the bulletin as well as your parish's creation schedule so bulletin inserts can be delivered ahead of your weekly submission deadline.
- During the preparation phase and within the first few weeks of your campaign silent phase, make sure to discuss which of the following platforms you may use with your Parish Campaign Director, and the audience that each platform accesses:
  1. E-Blasts
  2. Online Bulletins
  3. Parish Website
  4. Constant Contact
  5. Flock-Notes
  6. Live Streaming
  7. YouTube
  8. Facebook
  9. Twitter
  10. Instagram
  11. Other: \_\_\_\_\_
- The above are starting points for adaptation and use in your parish.
- Editable versions of materials in the Parish Communication Guide will be posted to the campaign website, and your director will work with you to develop parish-specific content.



## Contacts at the Archdiocese Office

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For questions regarding pledge processing, fulfillment and changes:

- Trish Kiedrowski, Pledge Processing & Systems
  - 414-769-3321
  - [kiedrowskit@archmil.org](mailto:kiedrowskit@archmil.org)
- Michele Nabih, Director of Systems
  - 414-769-3323
  - [nabihm@archmil.org](mailto:nabihm@archmil.org)

For changes to parish rosters:

- Kathy Nyman, Systems
- [parishupdates@archmil.org](mailto:parishupdates@archmil.org)

For stewardship training and materials:

- Cindy Lukowitz
  - 414-769-3572
  - [lukowitzc@archmil.org](mailto:lukowitzc@archmil.org)

For gifts of stock, Qualified Charitable Distribution (IRA), and other planned gifts:

- Bob Pfundstein
  - 414-769-3583
  - [pfundsteinb@archmil.org](mailto:pfundsteinb@archmil.org)

For parish campaign finances:

- Kim Kasten
  - 414-769-3326
  - [kastenk@archmil.org](mailto:kastenk@archmil.org)



## Frequently Asked Questions by Parish Families

### A. Campaign Related

#### 1. What is the Love One Another Campaign?

The Love One Another Campaign is to prepare for the next generation of Catholics in our 10 counties of southeastern Wisconsin. Its goal is to raise pledges totaling \$150 million for needs in our parishes, helping the poor, and providing new and strengthened Catholic ministries across the Archdiocese of Milwaukee.

#### 2. Which parishes are participating in the Love One Another Campaign and how will they participate?

All 188 parishes are taking part in four parish "waves" from summer 2021 to mid-2023. Parishes will conduct their own Love One Another Campaign efforts, supported by a campaign team.

#### 3. Why is now the right time for the Love One Another Campaign?

Love One Another was paused during the pandemic to focus on the needs of our parish communities. The needs addressed by Love One Another continue, and we are now able to return our focus to the campaign.

#### 4. How will Love One Another strengthen parishes?

Sixty percent (60%) of the funds raised, \$90 million of the overall campaign goal, will fund local parish needs identified by pastors, parish directors, and parish leadership.

#### 5. How are parish goals set?

Parish goals are 140 percent of parish offertory for the 2019 fiscal year. The goals are not assessments.

#### 6. How will campaign funds be allocated?

Sixty percent (60%) of pledges made and fulfilled by families in a parish will be used for the parish's stated needs. The remaining funds will be distributed based on the percentages allocated to each Catholic ministry in the campaign case statement.

#### 7. Who will be asked to participate?

Every individual and family in the Archdiocese will be asked to prayerfully consider making their best campaign pledge.

#### 8. How will campaign funds be administered?

A trust has been established for the sole purpose of receiving and disbursing funds raised through the Love One Another Campaign for the uses and purposes set forth in the campaign and no other purposes.

#### 9. Besides pledging, in what ways can people help the campaign?

All are asked to pray for the success of the Love One Another Campaign and for the parishes and ministries it serves. Also, every parish needs volunteers to help carry out the campaign. Please contact your parish office to volunteer.

## Frequently Asked Questions by Parish Families Continued

### *B. Giving*

#### 1. Why emphasize pledges?

Pledges are payable over 5 years to allow individuals and families to fulfill their generosity over time and eliminate what might be a burden to give all at once.

#### 2. Why does my pledge request letter ask for a specific amount?

A pledge amount is suggested to help your parish reach its goal. Prayerful consideration should be given to making a pledge in proportion to one's blessings. Every pledge is important and appreciated.

#### 3. Why are donors asked to complete and sign pledge cards; are they legally binding?

A pledge to the Love One Another Campaign is a promise to do one's best to give as stated on the pledge card. A signed pledge card is not legally binding and should a donor's finances change a pledge can be adjusted accordingly.

#### 4. How are pledge payments made?

Donors may choose to fulfill their campaign pledge with monthly, quarterly, semi-annual, annual, or one-time payments by check, credit card, automatic bank withdrawal, or qualified IRA distributions (age 70.5 or above). The Archdiocese will process gifts and provide acknowledgments and tax letters.

#### 5. Are gifts to the campaign tax-deductible?

Gifts to the Love One Another Campaign are tax deductible to the extent allowed by law. Please consult your tax advisor regarding your specific situation.

#### 6. Are gifts of stock or other non-cash gifts accepted?

Yes. The Love One Another Campaign accepts gifts of stock, and some non-cash gifts. Please contact Bob Pfundstein at 414-769-3583 or [pfundsteinb@archmil.org](mailto:pfundsteinb@archmil.org) for more information.

### *C. Other*

#### 1. Is the Catholic Stewardship Appeal taking place during the campaign?

Yes, the Catholic Stewardship Appeal will continue to be conducted annually. The Catholic Stewardship Appeal provides for the operational needs of the Archdiocesan Church on a year-to-year basis. The Love One Another Campaign is to meet extraordinary current and future needs of the greater southeastern Wisconsin Catholic community.

#### 2. What became of the proceeds from the Faith In Our Future campaign?

\$83 million was collected from pledges. \$46 million addressed individual parish needs. \$11 million was disbursed in grants in support of the Faith In Our Future Trust initiatives. The remainder is in a designated Trust specially created for long term use. Full details can be found on the Trust website [www.faithinourfuture.org](http://www.faithinourfuture.org).



## Frequently Asked Questions By Parish Leaders and Volunteers

### 1. Why emphasize pledges payable over 60 months, (five years)?

Most families can make larger gifts when they are budgeted and paid for in installments over 60 months, (five years).

### 2. Why are donors asked to complete and sign pledge cards?

We ask donors to sign their pledge cards to confirm their intentions to give. Pledges are not legally binding and can be changed in donors' circumstances change.

### 3. Why is an initial payment requested?

If a donor is able, they are encouraged to make an initial payment. An initial payment is a strong indication of a donor's commitment to completing a campaign pledge.

### 4. How should pledge payment checks be made payable?

Checks for pledge payments should be made payable to "Love One Another Campaign." Donors may write the name of their parish in the memo space on their check.

### 5. Can a donor restrict their gift to a specific element of the campaign case, including their parish?

Donors are encouraged to give to all the areas of need in the of Love One Another Campaign case for support. A donor may restrict their gift to one or more of the campaign case elements.

### 6. Why do donors place their completed pledge cards and initial payments in sealed envelopes to be mailed for processing?

Completed pledge cards and initial payments are placed in sealed envelopes to:

- a. allow donors who choose to use them protect confidential information.
- b. keep credit card information confidential.

Campaign funds, including cash gifts, should not be deposited into parish bank accounts.

### 7. How will pledge cards and initial payments be sent from the parish to the Archdiocese to be processed and acknowledged?

During the active phase of the campaign, the Pilot Phase, Wave 1, Wave 2 or Wave 3, the parish will be provided tamper-proof envelopes to mail pledges and initial payments to a campaign-designated lockbox for gift processing and accounting.

## Frequently Asked Questions By Parish Leaders and Volunteers Continued

### 8. Who will acknowledge pledges and provide tax letters?

- a. Parishes are encouraged to send their own thank you letters to their donors.
- b. Donors will receive thank you letters from Archbishop ListECKi for their gifts and pledges.
- c. All donors will receive annual tax letters from the Archdiocese.

9. **How will the pledges be collected?** The Archdiocese is responsible for pledge collection. The Archdiocese will mail pledge payment reminders to those paying by check according to the donors' chosen payment schedules. Donors paying by credit card or automatic withdrawal will receive annual statements as reminders of their ongoing pledge payments.

### 10. When and how will our parish receive its share of the funds paid by our parishioners? Will the parish be assessed for these funds?

The parish share of funds collected will be allocated to the Love One Another Trust upon receipt from the donor. Disbursements of these funds into a restricted parish account will be made on a quarterly basis. The parish must request a proxy to use its funds in accordance with the parish case statement. These funds are not subject to the annual Archdiocesan assessment.

### 11. Will the Love One Another Campaign affect parish offertory?

Parish offertory generally remains constant during campaigns of this nature with proper communication and planning.

### 12. How should our parish plan to conduct its annual offertory appeal and the Catholic Stewardship Appeal?

Parishes should be able to conduct their annual parish offertory appeals and the Catholic Stewardship Appeal as scheduled and planned.

### 13. What if a family can only give to the Love One Another Campaign by reducing its gifts to the parish or the Catholic Stewardship Appeal?

Giving to the Love One Another Campaign is meant to be over-and-above a family's regular giving to the Church; that takes priority.

### 14. Is corporate matching accepted as a way to increase the impact of one's pledge?

Yes, if your company has a matching program, this is a great way to increase or even double your pledge. All corporate matching inquiries should be directed to your HR or finance departments.



IMPORTANT

## 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)
- <u>\$900,000</u> (goal)
\$225,000 x 80% = \$180,000

Parish retains all funds raised beyond 125% of goal:

\$1,500,000 (total raised)
- <u>\$1,125,000</u> (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)
+ <u>\$375,000</u> (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 [loveoneanother@archmil.org](mailto:loveoneanother@archmil.org).
- 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**

Archbishop Jerome Listecki

Bishop James Schuerman

Father David Reith

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

Father Matthew Widder

Father Dennis Wieland

Father Anthony Zimmer