

work of faith + labor of love
ENDURANCE
in hope
DIOCESE OF CADROSSE

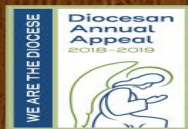


We give thanks to God always for all of you, remembering you in our prayers, unceasingly calling to mind your

***work of Faith and labor of Love and
Endurance in Hope***

of our Lord Jesus Christ, before our God and Father

1 Thessalonians 1:2-3



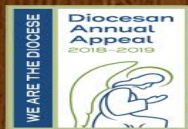
Holy and Triune God, Father, Son, and Holy Spirit. We thank you for having called our ancestors who in the hope of Christ Jesus, settled, endured, and evangelized this land, stewarding their gifts, with works of faith and labors of love.

O, God only with Your guiding hand can we build communities that are signs of Your presence, and share the Good News of salvation for all peoples.

Your servant Father Joseph Walijewski, sharing in Your compassion for humanity put himself unconditionally at the service of the Church for the kingdom here on earth. Through his intercession, we rely on his help to steward our gifts so we may bring the healing touch of Christ who calls us to holiness and to Mission.

Holy Mary, the Mother of Hope, sustain us in faith; guide us your children as we seek the Heavenly Kingdom of God.

Through Christ our Lord. Amen



Agenda for 2018 – 2019 Diocesan Annual Appeal

- Welcome and Introduction
- This Year's Theme
- Parish Targets
- Supplies
- Questions and Answers

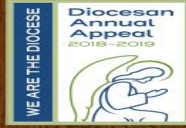
Office of Stewardship & Development Team

- Jeff Reiter, Stewardship & Development Director
- Sarah Komperud, Administrative Assistant
- Kristine Garavalia, Data Services
- Margot Lorraine, Services Assistant



Why...

- Christ is our Hope
- Gospel Message
- Sesquicentennial
- Continuation of last year's theme



Changes to the Appeal

- Pick your own kick off weekend with a range of dates
 - Weekend of September 22/23, 2018 to the Weekend of October 13/14, 2018
- Default will be September 22/23



Four Phases

- Promote
- Obtain
- Follow-up
- Thank the Donor



Promote

What to can be done

- Show Video
- Send letters from the Pastor
- Homilies and Witness Talks
 - Focus on the Appeal as an investment
- Tie a specific project to the rebate
- Website and Social Media
- Use the Brochures, Banners, and Posters
- Be positive and upbeat



Promote

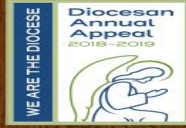
- Social Media
- Posters
- Up to Date Reporting
- Ambo
- Newsletters
- Local Papers
- Billboards



Obtain

What to can be done

- Remind
- In-Pew
- Show progress
- Encourage On-line giving
- Website: Parish specific
- Diolc.org/Hope



Obtain

New Tax Laws Implications

Majority of Catholics give for impact 78%. The second reason is they now it is their responsibility to share their gifts 74%. Also, less than 1% will be subject to the Inheritance and Gift Tax.



Obtain

New Tax Laws Implications

- The new standard deduction is \$24,000 for couples \$12,000 for singles. The standard deduction is twice what it used to be.
- Most people will not exceed these limits.
- The limit of Charitable Gifts is now 60% of Adjusted Gross Income



Obtain

New Tax Laws Implications:

The goal now for most people is to avoid Income tax and Capital Gains Taxes. There are several ways we can help supporters invest in the Diocesan Annual Appeal and avoid or minimize tax implications



Obtain

New Tax Laws Implications:

Mandatory distributions from IRA.

- **The Custodian distributes directly to the Appeal or Parish**
 - Direct distributions to a charity will not be included as income on the donors taxes
 - Distributions to the person directly count as income and are taxed accordingly

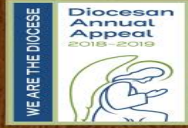


Obtain

New Tax Laws Implications:

Transfers of Appreciable Properties

- Stocks, certain properties, crops and other commodities
- **Have the broker transfer directly to the Appeal or Parish**
 - Direct transfers to a charity will not be subject to capital gains taxes
 - Instead of cash transfer stock and use the cash to buy more of the stock



Persist

What to can be done

- Create an investment mindset
- Telephone
- In-Pew
- Send out LYBUNT and SYBUNT letters from the pastor
- Use GivingTrend
 - Diolc/givingtrend.com
- Persevere



Gratitude

What to can be done

- Thank you cards
- Personal Calls
- Public Acknowledgement
 - Not personally calling out
- Celebrate Milestones
- Bulletin Ads
- Banners



The Allocation

Target Formula

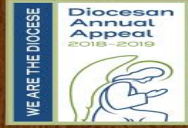
Step 1. $(A + B)/2 \times \$6,880,539 = Y$

Step 2. $C + D = Z$

Step 3. $Y - Z = \text{Net Parish Target}$

Step 4. Parish targets are adjusted so that no parish has an increase of no more than 10% or \$10,000 or drop more than -10% or -\$2,500 from their previous year's target

A, B, C, D are from the Bishop's Annual Report



The Allocation

Target Formula

Variable A: Line 16 (401): The adult envelope receipts for a parish as a percentage of the entire adult envelope receipts for the Diocese for the 2016-2017 fiscal year.

The Allocation

Target Formula

Variable B: The number of envelope holders who contribute \$100.00 or more per year to a parish, as a percentage of the total number of envelope holders who gave \$100.00 or more for the Diocese for the 2016-2017 fiscal year.



The Allocation

Target Formula

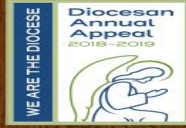
Variable C: School Calculation 1: Line 102B (School and Convent), for a parish as a percentage of Line 102 for the total for the Diocese. This percentage is then multiplied by \$690,000 = C.



The Allocation

Target Formula

Variable D: School Calculation 2: The total number of students enrolled in Catholic schools multiplied by \$88.00 = D.



The Allocation

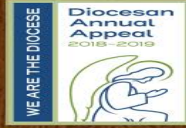
Target Formula

Step 1. $((A + B)/2) \times \$\$ 6,880,539 = Y$

Variable A: Line 16 (401): The adult envelope receipts for a parish as a percentage of the entire adult envelope receipts for the Diocese for the 2016-2017 fiscal year.

$$(A) \quad 235,122 / \$37,619,549 = 0.00624999$$

Parish Adult Envelope Receipts/All Diocese Total Adult Envelope Receipts



The Allocation

Target Formula

Step 1. $((A + B)/2) \times \$6,880,539 = Y$

Variable B: The number of envelope holders who contribute \$100.00 or more per year to a parish, as a percentage of the total number of envelope holders who gave \$100.00 or more for the Diocese for the 2016-2017 fiscal year.

$$220/35,120 = 0.00626423$$

Parish Envelope Holders >100/All Diocese Total Envelope Holders > 100



The Allocation

Target Formula

Step 1. $((A + B)/2) \times \$6,880,539 = Y$

$(A+B) \quad 0.00624999 + 0.00626423 = .01251422$

$(A+B) = .01251422$

$((A+B)/2) \quad .01251422/2 = .00625711$

$(Y) \quad .00625711 \times 6,880,539 = 43,050$



The Allocation

Target Formula

Step 2. $C+D = Z$

$$C = 188,986 / 30,237,811$$

$$0.00624998 \times -690,000 = (4,310)$$

Schools and Convent Receipts / All Parish School and Convent Receipts $\times -690,000$



The Allocation

Target Formula

Step 2. $C+D = Z$

$$D = 38 \times \$88 = (3,345)$$

Total number of students enrolled at parish x per student credit



The Allocation

Target Formula

Step 2. $C+D = Z$

$$Z = (-4,310 - 3,345) = (7,655)$$



The Allocation

Target Formula

Step 3. $Y-Z = X$

$$X = 43,050 - 7,655 = 35,395$$

Raw Parish Target



The Allocation

Target Formula

Step 4.

Adjust parish targets - no parish can have an increase of more than 10% or \$10,000 or a decrease of more than -10% or -\$2,500 in a year.

=Net Parish Target



Procedure

Process

- All Gifts will be processed by the Office for Stewardship and Development
- All Correspondence will have the Diocesan Center's return address
- Each Parish specific 2d Coding on all remittance advices

Mail directly to
Diocese of LaCrosse
Office for Stewardship and Development
PO Box 4004
La Crosse, WI 54602-4004



Reminders and Supplies

- **Throw away all last year's remittance advises and materials**
- **Throw away all last year's remittance advises and materials**
- **Throw away all last year's remittance advises and materials**
- Go Online to place your order for
 - Posters
 - In-Pew remittances
 - Prayer Cards
 - Choose your kick off weekend

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in hope DIOCESE OF CAGROSSE



Questions and Answers