

## CAMPAIGN OVERVIEW

### 1. What is *Partners In Faith*?

*Partners In Faith* is a capital and endowment campaign designed to raise a minimum of \$40 million in gifts and pledges payable over the next three to five years for the needs of the Diocese of Paterson and its parishes. To reach this goal, each parish has been assigned a financial target as its share of the \$40 million goal.

### 2. Why do we need a major fundraising campaign?

At the present time, the Diocese of Paterson operates with funds provided by the Bishop's Annual Appeal, the assessment revenue provided by the parishes and the extraordinary income from sources such as investments, rental income and service fees.

A comprehensive capital and endowment campaign is needed to continue to support the extraordinary needs of our parishes and Catholic education, the special health care needs of our priests, the many good works of Catholic Charities and the renovation and restoration needs of St. John the Baptist Cathedral. The 2013 Bishop's Annual Appeal is also included in the campaign target.

### 3. Will the 2013 Bishop's Annual Appeal be conducted?

No separate campaign for the 2013 Bishop's Annual Appeal will be conducted. However, \$4 million from the diocesan campaign will be used to fund the 2013 Bishop's Annual Appeal. The Bishop's Annual Appeal will resume in 2014.

### 4. How is this campaign different from the Bishop's Annual Appeal?

The *Partners In Faith* campaign seeks to address long-term and extraordinary needs, while the Bishop's Annual Appeal helps fund the annual operating expenses of four distinct diocesan ministries. An objective of *Partners In Faith* is to establish new, or augment existing endowments. A permanently restricted endowment fund is one in which the principal monies are invested and are not withdrawn. The annual distribution earned from the endowments is used to fund initiatives of the Church. Endowments, therefore, provide continuous funding and enable the Church to be a responsible steward of its financial resources.

### 5. How is this campaign different from the Prepare the Way campaign conducted in 2000?

In every time, and especially times of great need, Catholics are called to continue to serve and care for others, evangelize and be a visible presence. The *Partners In Faith* campaign responds to that call by addressing current priorities that are primarily different from Prepare the Way. Just as the Prepare the Way campaign continues to make an impact on people's lives through the case elements it promoted, *Partners In Faith* will expand the scope of our outreach with unique initiatives that will benefit even more people through creative partnerships.

### 6. When will the campaign begin? Will pastors be kept informed of its progress? How?

The campaign is currently underway, starting with a comprehensive quiet leadership gift phase. As the campaign progresses, regular reports on progress will be sent to parish and lay leadership.

### 7. When will parishes participate in the campaign, and will parishes have a say in when they participate? When will the parishes be informed of these decisions?

All parishes will conduct their campaigns as part of a "group" of parishes at some point between fall 2012 and the end of 2013. We will take into consideration a parish's willingness to participate in a specific group. However, a campaign timetable that is heavy with activity at the "back end" is not our plan. Parishes will be informed of their group far enough in advance to properly prepare for the campaign.

### 8. How will parish targets be set?

In most diocesan campaigns, a parish's goal is typically based on a percentage of its annual offertory income. We are adhering to a formula that is uniform for all parishes and based upon existing data rather than perceived potential for support in a particular parish.

### 9. Will parishes have an opportunity to appeal their targets?

Yes. Recognizing that there may be a handful of unique circumstances in some parishes, the Pastors' Advisory Committee may establish a subcommittee to review requests for a goal reduction. In the end, though, the targets are numbers to strive for and not assessments.

### 10. What share of dollars raised will parishes receive as rebates?

Twenty-five percent (25%) of all funds received up to each parish's target will be returned to that parish for its own individual needs; sixty percent (60%) will be returned on all monies received over a parish's target.

## PARISH PARTICIPATION

### 11. How will parishioners be contacted in the *Partners In Faith* campaign?

In order for the Diocese of Paterson to raise a minimum of \$40 million, each of the 111 parishes will conduct its own local fundraising campaign. *Partners In Faith* will be conducted in four phases, commencing in September 2012 and concluding in January 2014. The Diocese hopes that each Catholic family will be visited or contacted by a fellow parishioner to explain the campaign and ask for his/her support.

### 12. How will *Partners In Faith* affect parish offertory?

In the short-term, offertory is expected to remain constant. Through *Partners In Faith*, volunteers will ask parishioners to make extraordinary pledges above and beyond regular giving. Parishioners are not asked to lessen their giving to their parishes, but to consider more of a commitment to the Church. In the long-term, similar campaigns in other dioceses have actually caused increases in parish offertory through parishioners embracing stewardship as a way of life and strengthening their vision of the Church.

### 13. Will stewardship be incorporated into *Partners In Faith*? How?

A capital campaign is an opportunity for stewardship. Through *Partners In Faith*, we seek sacrificial offerings of the financial blessings God has bestowed on us. It is important to realize that stewardship is an ongoing, lifelong endeavor to advance the mission of the Church. A capital campaign, however, is a brief and distinct effort that seeks to address immediate needs. A capital campaign, therefore, can be a way for parishioners to begin to practice stewardship.

### 14. Why does *Partners In Faith* emphasize personal visits?

Personal, face-to-face contact remains the single best way to raise funds. This method emphasizes the personal nature of giving, allows for a thorough presentation of the statement of needs, gives potential donors the opportunity to ask questions and allows volunteers to express their enthusiasm and reinforce their support for the campaign.

### 15. How will the shared funds be returned to the parishes?

The funds are collected through a pledge redemption process, tallied and held in a custodial fund. Parishes will receive their rebates annually. It is important to note that parishes will only receive shared funds on monies collected, not on pledges received.

### 16. Who is the custodian of funds raised through the *Partners In Faith* campaign?

The Catholic Foundation of the Diocese of Paterson will be the custodian of funds.

### 17. How will current economic conditions affect the campaign?

The simple answer is that philanthropic giving nationwide has increased in every consecutive year since it has been tracked. There have been five economic recessions since 1970; even through those, giving has increased. Recall that we tested a \$60 million goal for the campaign; the recommended lower goal of \$40 million does account for economic factors.

## GIVING TO THE CAMPAIGN

### 18. How much should I give to the *Partners In Faith* campaign?

All parishioners are asked to consider sacrificial gifts to the campaign in the spirit of Christian stewardship. Pledges are payable monthly, quarterly, semiannually or annually over a 36- to 60-month period. We will offer specific gift plans to parishioners and will encourage each individual to choose one that best suits his/her personal circumstance.

### 19. Am I able to pay my pledge using a credit card?

Yes, a donor may fulfill a pledge using a credit card. The donor simply completes an authorization form with the required information. These forms are included in all campaign materials presented to parishioners.

### 20. Why is each donor asked to complete a pledge card?

Each donor is asked to complete a pledge card so that the commitment is appropriately recorded and acknowledged, and so that donors are reminded of subsequent payments according to the schedules they request. Each donor is asked to sign his/her pledge card, indicating that he/she agrees to the terms of the gift indicated on the card. **Please note, however, that a pledge card is not a legally binding document, but rather a faith commitment.**

### 21. To what extent is my gift to *Partners In Faith* tax deductible?

Gifts to the campaign are tax deductible as allowed by law. The application of such laws varies with individual financial circumstances. Parishioners with specific questions regarding potential tax deductions should contact their attorneys or tax preparers.

### 22. How can a donor make a gift of stock/appreciated securities or other non-cash gift?

The campaign accepts and encourages gifts of stock and other liquid assets, including real estate. Such a gift may offer tax benefits to the donor.

Donors wishing to make a gift of appreciated securities should follow the securities transfer instructions included in each solicitation packet (see "Ways to Give" in main brochure for details).

Donors should be sure to contact the Office of Development to ensure their gifts of securities are properly credited and counted toward the campaign. Donors wishing to make non-cash gifts should speak with their pastors or contact the Office of Development at 973-777-8818 ext. 218.

### 23. Am I able to make a gift to *Partners In Faith* by remembering my parish or the diocese in my will?

For parishioners aged 75 and over, the *Partners In Faith* campaign welcomes donations from wills/bequests, as well as other legacy gifts that best meet the donor's financial planning needs. These gifts may include gifts of paid life insurance policies; gifts in the form of beneficiary designations on retirement savings accounts, such as 401(k) or 403(b) plans; gifts through the Diocesan charitable gift annuity program; and payments from trusts and other more complex tax-sheltered vehicles. **Donors should provide documentation of the gift, such as a photocopy of the relevant page of a will or a beneficiary designation form, so that we can properly acknowledge the contribution, as well as contact the Office of Development at 973-777-8818 ext. 290 to ensure their gifts are properly credited and counted toward the campaign.** For more information about legacy gifts and criteria that must be met for these gifts to count toward campaign goals, donors should see the legacy giving flyer ("*Make your gift go farther—and create a lasting legacy*").

### 24. How will my gift be processed, acknowledged, maintained and redeemed?

So as to not burden parishes with additional administrative duties, the Diocese of Paterson will assume the responsibility of managing a comprehensive pledge redemption system. Each donor will receive regular pledge reminders on the schedule indicated on his/her pledge card. Donors will mail all subsequent payments to the Diocese's gift processing center. Parishes will not be burdened with the task of collecting pledge payments.

### 25. In addition to my gift, what else can I do to help the campaign?

Every parish will need a team of dedicated volunteers to join with their pastors to reach out to Catholic families in their parishes. If you are interested in helping, please call your parish or the *Partners In Faith* Campaign Office at 973-777-8818 ext. 466.



## Capital & Endowment Campaign for the Diocese of Paterson

### Questions & Answers: A Quick Guide



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*The information in this brochure is not intended as legal or financial advice. Before making a charitable gift, we strongly encourage you to consult with your attorney or financial advisor.*