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# Funding efforts

Continued from Page 1  
the diocese.

Among the possible agenda items foreseen at this point will be finding funds to implement the seven recommendations of the Oversight Task Force presented to Bishop Clark in June, 1988. A number of those recommendations are currently being studied by various groups in the diocese. If fully implemented as proposed, the recommendations would cost an estimated \$47 million above and beyond the diocese's regular operating budget.

The foundation — and Seeberg specifically — would be charged with assessing whether resources are available to finance such an agenda. "The foundation is there to assist us in making that agenda come alive," Seeberg explained. "The institution prepares the agenda, the foundation comes back to say this can or can't be done and this is how to do it."

Although the management of the diocesan portfolio is not a formal part of the foundation proposal, it may be addressed by the subcommittee examining the plan, Father Mulligan acknowledged.

"I think it will be discussed," Father Mulligan said. "I'm sure there will be a recommendation as to how that will be looked at, too."

Father Bayer speculated, however, that "the diocesan portfolio would stay with the diocese. We're using the income from it in the (diocese's) operating budget," he said.

Seeberg's proposal to incorporate the development and TGA offices within the foundation is based in part on the Five Year Financial Planning Process Task Force's recom-

mendation #5, which calls for the consolidation of all diocesan fundraising efforts under the leadership of the development office.

Seeberg said he initiated the plan because "philosophically and on paper, the development function of the diocese is centered in two separate places (the development office and the foundation) at this time. The only way I can accomplish what I was hired to do is if the two are combined."

In his October 27 presentation to the Finance Council, Seeberg said, "The only reason for the Diocese of Rochester to have a foundation is to create a mechanism that will provide increased benefits for the diocese. The foundation cannot achieve this end unless it is staffed and budgeted, and I cannot fulfill my responsibility to build an integrated development program if the development function resides in two places at the same time."

Seeberg also recommended that if the plan is not approved, the foundation be dissolved so that development operations in the diocese could be consolidated in the development office.

"We want a comprehensive, integrated development program to have continuity and respect for the donors in our fundraising efforts," Seeberg explained. "All fundraising has to come from one source. You can't go to Mr. Smith and ask for a large gift to the sisters' retirement fund while another office is hitting him up for a TGA gift."

However, Seeberg would prefer to see the foundation continue because of the advantages it offers for fundraising.

"There are two main purposes to having a foundation," Seeberg explained. "One, to somehow protect the interests of potential

donors, to ensure him his gift would be used the way he thought it would be used. Two, to bring credibility to the whole process of soliciting gifts."

For the diocese, the foundation offers another advantage. "The reason for doing this was to provide the Bishop of Rochester a tool, a mechanism that is not normally available to the chief executive officer of a diocese — namely a board of trustees," Seeberg said. "This is the reason a number of dioceses are moving in this direction."

Such a board, Seeberg said, would provide professional advice about fundraising. Because the board will consist of individuals prominent in the financial and business world, it would also provide access to sources of income the diocese has not adequately tapped in the past.

"We need to find people of influence, insight, expertise — people who know the community," Seeberg noted. "I've got to get a group to help the bishop in the process of raising money, and which tries to spread a sense of ownership of the diocese throughout the diocese. When people feel they have ownership, they are more willing to give."

Some of the current and potential board members have been involved with the work of the Five Year Financial Planning Process Task Force, and thus would be aware of diocesan goals and financial need in the coming years, Seeberg pointed out.

With the proposed changes, the existing foundation would fit the role Seeberg envisions for it. As it is now structured, however, "it's just an entity sitting on a piece of paper," he observed. "There are on it a number of active Catholics of good will, many of whom are involved in the community and in the business

world. It hasn't been active — not (because) the members haven't done their job — it's that we haven't given them anything to do."

Current foundation board president Paul Pagerey acknowledged that the foundation has been on hold since it was formed in 1984. The foundation was originally charged with raising \$10 million over a 10-year period. This money was to be used for special projects, not for normal diocesan operations already funded by the TGA.

The foundation did disperse more than \$100,000 through three funds — education, human life and human needs — but board members, who have been meeting since 1985, soon discovered that they were limited in what they could do.

"The foundation was pretty limp," Pagerey said. "It didn't have any strength. We knew we were to raise money for education, human life and human needs, but how much for each we had no idea. It was frustrating when we realized that it would be impossible to carry out the mandate given it."

"We did try to raise money, but we lacked the professional help we needed to undertake that effort," he continued. "With Mark (Seeberg), we have that person."

The foundation was also hampered by instructions that it not compete with or be involved with the annual appeal. "I think it was a fundamental weakness of the foundation," Pagerey observed. "We had to be in competition with the annual appeal, yet we were not supposed to be. We saw that there has to be a single, integrated fundraising effort."

In addition, Pagerey noted that the foundation board lacked specific goals. "The foundation was handicapped in not being able to say what the money will be used for," he observed. "You can't ask people for money simply because the diocese needs it. You have to tell them what it's for to sell a giving program."

The missing goals, Pagerey noted, have been supplied by the Five Year Financial Planning Process Task Force, which was formed in 1986 to estimate what funds and resources are realistically available to the diocese, to examine how those resources might be more effectively used, to recommend ways to improve diocesan administration, and to continue the process of long-range financial planning.

After the task force released its recommendations in April, 1987, an Oversight Task Force was formed to develop an implementation plan and determine its cost. The Oversight Task Force's June, 1988, report called for the Diocese of Rochester to spend approximately \$47 million over the next five years on such diocesan needs as a retirement fund for women religious; an endowment fund for Catholic education; a retirement residence for well priests; and formation, training and salary and benefits for lay ministers.

"The seven recommendations form an umbrella for fundraising," Pagerey observed. At the same time, he added, "the task force showed that (the foundation's original goal of) \$10 million wouldn't do it."

Pagerey, who plans to retire when the new board is formed, approves of Seeberg's proposal.

"(His) proposal for a redoing of the foundation, a strengthening of it, is an integration of a lot of ideas," Pagerey said. "It's the right direction to take."

The proposal is one of several Seeberg has made since beginning as diocesan development director in July. On August 9, in a memo to Father Mulligan, Seeberg outlined problems that he saw with the diocese's fundraising efforts. Among the areas of concern mentioned in the memo were: overhauling the foundation, clarifying to whom the development director reports, and illustrating the need for a communications/marketing person in the development office.

In September, the development office — which previously was part of the Division of Support Services — became "a separate function within the Pastoral Center," according to Seeberg, who now reports directly to the bishop's office.

"The development director is attempting to mediate two worlds," Seeberg explained. "He's trying to present the story of the institution to the people, but also to listen to the concerns of the people and convey those concerns to the diocese. People in the community have to know when they tell me things (that) I have some direct contact with the bishop so they will share (those) things with me."

## Bike trekkers needed

The American Lung Association Finger Lakes Region, Inc. is planning its first Spring Bicycle Trek for Life and Breath from June 24-26. Experienced bicyclists, bike mechanics and people with good organizational skills are needed to help plan and run the event.

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