

4. Development/Fund Raising

How can the Diocese attract more donors and larger donations for capital needs, specifically the schools, the Women Religious Retirement Fund, and ongoing fund raising drives such as the Thanks Giving Appeal?

Key Findings

- Although now the highest socioeconomic group in the country, Catholics across the U.S. are not giving as generously to the Church as other denominations. Yet they do tend to give a larger share to non-church charities.

Key Donors

- Key donors are generally much older than Catholics in the general population. They tend to be more religiously active (attend Mass at least four times a month) than the general Catholic population.
- Key donors estimate that they give more than half of their total charitable contributions to the Church. (The general Catholic community gives about 37% of its total charitable dollars to the Church.) Almost half of key donors said that they could afford to give more to the Church. About one third would give more to the Thanks Giving Appeal if they were in a better financial position. Active Catholics (those who attend Mass four or more times a month) allocate almost twice as much to the Church as inactives, while those involved in parish activities allocate significantly more than non-involved Catholics.
- The major reasons that key donors give to the Church are that they can afford to, they are strongly committed to their faith, and they perceive that the Church greatly needs their support. Knowledge of how the funds are to be used, direct appeals from their pastor, and involvement in determining where the funds go are important factors in influencing the level of giving. (Pastors and women religious focus almost exclusively on information as the key to influencing donors.) Inactive Catholics were more likely to say that they would give more if they were actually involved in the decision-making process.

TGA

- Most of the Catholic community is aware of the Thanks Giving Appeal, and slightly more than half report contributing. The Catholic community generally has positive attitudes about the Appeal. Two-thirds feel that TGA funds greatly help the Diocese accomplish its goals, and most believe the funds are used wisely. Active Catholics (as measured by frequency of Mass attendance) are much more likely to report contributing to the Appeal (74%), as are those involved in Church activities (82%).

- In general, those dissatisfied with their pastor's leadership are less inclined to think highly of the TGA. However, dissatisfaction with pastoral leadership appears to have little or no impact on giving. Of those who do not contribute to TGA, 26% cite financial reasons. Some do not give because they disapprove of school policies (5%) or how the funds are handled (8%).

- Almost three-quarters of key donors would be interested in designating their Thanks Giving Appeal gift to a special fund such as an "Adopt-a-Student Fund" to provide scholarships to needy students.

Women Religious Retirement Fund

- About 70% of key donors and the general Catholic community would support a retirement fund for Women Religious. Active Catholics were somewhat more likely than inactives to say that they would contribute. Of those reluctant to contribute to such a fund, many would contribute if given an explanation of the shortfall or if the need were clearly demonstrated.

Recommendations

Development

- Undertake an aggressive effort to involve more people in parish activities.
- Find more people like the current key donors, and/or enhance relationships with younger parishioners. Tap the growing number of younger people of means.
- Give the younger community flexible giving options, such as multi-year contributions to recognize that their incomes are likely to increase over time.
- With older donors stress ways to continue to provide for the Church's needs after their death.
- The case for fund raising should state the need, specific uses, how it will help, and why the particular cause deserves the gift.
- Examine the Thanks Giving Appeal process, its objectives, and how its purpose could be communicated more effectively. Stress increasing the percentage of Catholics who contribute and increasing the average gift. Consider focus groups and an annual survey to evaluate the effectiveness of changes.

- Consider donor designation options.
- Before embarking on a campaign for Women Religious Retirement, study and test the message and positioning.

"Involve more people in parish activities"

Actions Planned or Under Way

Development

- A Diocesan Director of Development and a Special Gifts Director have been hired. Addition of an Annual Giving Director is proposed for the future.
- Bishop Clark is firmly committed to the development process. He now devotes considerable time to personal contacts with key volunteers and benefactors and to the Stewardship Council.
- Two part-time researchers have been hired and trained to identify persons capable of major or increased gifts. They have identified 500 major gift candidates and developed in-depth profiles on 100 constituents. Outreach has begun to the top 100 prospects.
- An evaluation of the TGA program has been completed; changes will be in place by June 1991. A leadership gift phase of the TGA was initiated for this year's campaign, involving more than 100 volunteers and resulting in a 28% increase in donations from a sample of 600 givers. Next year the target group and the number of volunteers involved will double and the effort will be extended further into the regions beyond Monroe

County Opportunities for designated gifts, particularly those which might be attractive to "baby boomers," will be explored.

• The TGA case has been strengthened and material upgraded. Case statements for schools and sisters' retirement fund have been drafted.

• There is increased lay participation in all phases of development. The research conducted by the Winters Group will be the forum for opportunities for meetings with Catholic and community leaders.

• A planned giving program emphasizing both lifetime gifts (e.g., appreciated securities, real estate and trust arrangements) and bequests will begin this spring.

• A formal, ongoing major gifts program will begin this spring, with potential for developing into a capital campaign. A steering committee is now being organized.

• To develop a compelling, cogent case statement for voluntary support, procedures will be established for an annual review of capital and special needs, based on the new Diocesan mission statement.

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For more Information

For further information about the Winters Study, contact the Department of Communications, Diocese of Rochester