



# HEART OF A SHEPHERD

*Building for Today. Providing for Tomorrow.*

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## FREQUENTLY ASKED QUESTIONS & ANSWERS

### GENERAL CAMPAIGN QUESTIONS

#### Why are we having a campaign?

The *Heart of a Shepherd* campaign is an extraordinary endeavor designed to strengthen and better meet the needs of the Saint Mary and Borromeo Seminaries, its seminarians, and our newly-ordained and retired clergy via a renovation to the seminaries, support to clergy pensions, and relief for clergy tuition debt. The campaign was paused in March 2020 due to the COVID-19 pandemic and will re-start in Fall 2020. In direct response to the challenges set forth by the COVID-19 pandemic, Phase II of this initiative also provide an opportunity for parishes across the Diocese to raise funds for their own local use.

#### What are we trying to raise?

The Diocese of Cleveland is committed to training the future shepherds of the Church and aiding those who have served our Diocese. Realizing these obligations will require the infusion of substantial funds raised through a major fundraising effort. A \$30 million campaign will support our mission to create an environment that fosters the human, spiritual, intellectual and pastoral growth of our seminarians and helps provide necessary resources for our newly ordained priests and retiring clergy. The total campaign goal will be allocated across three major areas:

- Seminary Renovations - \$20 Million
- Clergy Pension Retirement Fund - \$7 Million
- Newly-Ordained Tuition Debt Relief - \$3 Million

#### Has the campaign started? How long will it last?

The formal campaign period is projected to be 18 months, beginning July 2019 and closing in December 2020. The campaign launch follows a six-month study and planning phase that commenced in January 2019. General timelines are designed for the overall effort and each specific phase. The official campaign timetable may be revised throughout the duration of the campaign. While the formal campaign period will last 18 months in total, pledge payments can be made over a period of 2 to 3 years.

#### How much have we raised so far?

We are so grateful to more than 1,900 donors who have already made a commitment to the Heart of a Shepherd campaign. Thanks to their generosity, we have raised approximately \$13.2 Million in new funds committed to the project as well as parishes who have already engaged their faith community in the campaign.

#### Do we need to collect all the money before construction begins?

No. Due to the generosity of many donors who have already pledged their support to this initiative, construction will begin at the Seminaries in late 2020. Campaign funds will be necessary to complete the project and achieve the campaign goal for the retirement fund and endowment for tuition aid.



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### **How were the campaign priorities decided?**

In January 2019, the Catholic Community Foundation conducted a feasibility study assessing the viability of a large-scale fundraising effort dedicated to the seminaries and our clergy. The result of 89 personal interviews and over 200 survey responses showed a tremendous level of support for the projects. On the strength of the support from the community, the decision was made to move forward with a capital campaign.

### **How is the goal determined?**

As part of the feasibility study conducted by CCS Fundraising, a fundraising consulting firm, campaign goals were tested through interviews with members of the Diocesan community. Those interviewed were asked about their likelihood of making a gift, and many indicated a gift amount. The campaign goal reflects the information gathered during the study and considers the pacesetting gifts required in the early stages of the campaign.

### **How will we reach the goal?**

The campaign will feature a two-pronged strategy; the first is a major gift strategy whereby Fr. Don Oleksiak will work closely with lay and pastoral leadership and the senior development team to build momentum through one-on-one requests for support. The second part of the strategy is an invitation for parishes to engage with the campaign in one of three ways. Type and levels of engagement will differ among parishes, but it is the aim for every parish to play a role.

### **What if we do not meet our fundraising goal?**

We expect that we will reach our goal in pledges and initial gifts. If the projected pledges at the end of the campaign are significantly lower than expected, we will discuss options to simplify projects. The priority of this campaign will remain with the renovation of the seminaries and that priority will receive 100% of the cash donations as collected until such time as the cost of the seminary upgrades are fully paid by the donations.

### **Who will be asked to support the campaign?**

Households across the Diocese, including clergy and individual parishioners, will be asked to consider making a financial pledge to the campaign.

### **Why is the campaign seeking 3-year pledges?**

We encourage pledged gifts because they allow individuals and families the opportunity to spread payments over a multi-year period. From similar campaigns, we have learned that donors who pledge are able to consider sacrificial gifts that are a multiple larger than those who make one-time gifts. This is important for a fundraising effort of the size and scope of the *Heart of a Shepherd* campaign.

### **Who is managing the campaign?**

The Catholic Community Foundation, in partnership with CCS Fundraising, is proud to manage this critically important initiative in collaboration with the Diocese.

### **What will happen to my pledge if the Diocese of Cleveland or the Catholic Community Foundation is sued?**

Your pledge, once contributed, represents a donor-restricted gift held and managed by the Catholic Community Foundation, a non-profit (501(C)(3)) corporation that is separate from the Diocese of Cleveland. The funds will be held in a bank account



established specifically for this campaign until the funds are spent on the seminary project, contributed to the priest education endowment (also held by the Catholic Community Foundation), or transferred to the priest pension trust as defined in the fundraising plan. Likewise, the seminary and the priest pension trust are entities that are separate and distinct from the Diocese. Both the fact of separate incorporation and the fact that your gift is a restricted gift will help to ensure that your gift is protected in the event of any claims or litigation against the Diocese.

## CAMPAIGN CASE ELEMENTS: SPECIFIC QUESTIONS

### What is the difference between the Saint Mary and Borromeo Seminaries?

Borromeo Seminary is the four-year college level seminary. This is known as the Discipleship Stage where men are introduced to the formational four pillars: human, spiritual, intellectual and pastoral. In a gradual way, the men at Borromeo work with their formation advisor to explore all aspects of their lives in order to appreciate their strengths and weaknesses as well as embark on a four-year curriculum of philosophy, sciences, and liberal arts.

Saint Mary Seminary is a five-year graduate theology formation program. This is known as the Configuration Stage where those in proximity to ordination are called to become personally configured into Christ the Good Shepherd. Saint Mary Seminary and Graduate School of Theology is a fully accredited educational degree-granting institution. Building on the Discipleship Stage, seminarians embrace a rigorous formation curriculum that intensifies growth and integration of the four pillars described above.

### How many seminarians are currently enrolled at our seminaries?

Currently there are 71 men in formation at Borromeo Seminary and Saint Mary Seminary, of which 42 will serve as ordained priests for service in the Diocese of Cleveland. The remaining 29 seminarians are discerning a priestly vocation for service to other religious orders as well as the dioceses of Youngstown, and Daegu, South Korea. Seminary enrollment has remained largely consistent through the years when many other seminaries are experiencing declining enrollment.

### What is the total cost of the renovation?

The campaign will invest \$20 million to improve student housing, study areas, technology, and the chapel. The living quarters of the Borromeo and Saint Mary students will undergo major renovations. The seminaries have not had significant renovations since they were founded in the late 1940s. For a more detailed overview of the renovation plans, please refer to the Case for Support.

### Why is the Resurrection Chapel included in the campaign plans?

While the Resurrection Chapel was not initially included in the renovation plans during the feasibility study, the decision was made to include the Chapel as part of the overall renovation plan. This holy space is the heart of our seminary and requires an update.

### Wasn't the Clergy Pension Retirement Fund a part of the *Rooted in Faith* campaign? What impact will the Clergy Pension Retirement Fund have on our parishes?

Yes, it was. Before the *Rooted in Faith* campaign, the annual premiums paid by parishes peaked at \$11,750 for each full-time priest. The *Rooted in Faith* campaign successfully raised \$15 million for the retirement fund, effectively reducing the annual premium to \$10,000. Without *Rooted in Faith*, the annual premiums would have quickly increased to \$23,000. The target for this campaign is to bring the fund balance up to \$60 million and therefore significantly reduce the parish premium down to approximately \$2,000 to \$5,000 per year, taking into account normal market fluctuations. The successful achievement of the goal will result in annual pension expense savings in our parishes and diocesan entity budgets.





### **What portion of the funds raised will be distributed outright and what portion will be endowed for the future?**

All funds raised for the seminary renovation project will be distributed outright to cover the project costs. With respect to the Priests' Retirement Fund, these dollars will be added to the existing Priests' Retirement Fund, invested in accordance with fund guidelines, and distributed for the purpose of supporting retired priests from the Diocese of Cleveland. Funds raised to assist newly-ordained priests with tuition debt will be used to create an endowed fund, from which ongoing distributions will be made.

### **How much tuition debt do our newly-ordained clergy have?**

Individual student debt ranges widely. In a 2019 survey conducted internally by seminaries, respondents reported a debt range of \$8K to \$112K, with the average being \$38K (Seminar Education Loan Survey, 2019).

### **Will all ordained clergy receive tuition debt assistance?**

No. Only ordained clergy who are currently assigned within the Diocese of Cleveland will receive partial tuition debt assistance. A draft distribution policy is currently under review by multiple oversight bodies, including the Diocese's Finance team, Legal Office, and the Bishop's Office.

## **PARISH INVOLVEMENT**

### **How are parishes asked to participate?**

Every parish will be encouraged to participate in the campaign, though participation will not be mandatory. Parishes will be offered three engagement options, each designed to align with a parish's individual priorities and timing considerations. With the assistance of the Campaign Office staff, each of the 185 parishes within the Diocese of Cleveland will be invited to run a parish-wide effort, lasting approximately eight weeks in length in late 2020 or in 2021.

### **Did my parish already take part in the Heart of a Shepherd campaign?**

If your parish was one of the ten pilot parishes who participated in Fall 2019, then yes. We are so grateful to the ten Pastors, parish staff, and volunteers who led successful parish campaigns in their respective parishes. Their success helped inform our campaign activity moving forward. In total, the ten pilot parishes raised over \$3.7 Million for both the campaign and local parish initiatives.

### **Will any portion of the funds raised go back to the parishes?**

Yes. Starting in Fall 2020, parishes will have the option to allocate between 50 percent and 65 percent of all funds raised for an identified, agreed-upon need. All other proceeds will benefit the Heart of a Shepherd campaign. A parish may opt to make an outright commitment on behalf of the parish in the form of a three-year pledge, in which case all proceeds will go to the Heart of a Shepherd campaign.

### **Why is the parish engagement model different now after restarting the campaign?**

Our parishes are working to address new and different challenges as a result of the COVID-19 pandemic. In the time that the campaign was "paused", we took time to hear the concerns of our Pastors and parish staff and understand the financial hardships they continue to face. This new model, specifically the opportunity to raise funds for local parish needs, is a direct response to these financial hardships. We aim to achieve the vision of this campaign while also supporting our parishes in a different way than before.





### **How are parish targets established?**

The parish targets were set with an intention to support our parishes meaningfully while still achieving the mission of the campaign. To reach the three engagement options, we sought the feedback of many, including Father Don Oleksiak, the College of Consultors, the Pastor's Advisory Council, the Catholic Community Foundation Board of Directors, and the Campaign Cabinet.

## **CAMPAIGN MECHANICS AND PAYMENTS**

### **When did *Rooted in Faith* end? Was it successful?**

Thanks to the generosity of people from every parish in the eight counties of the Diocese of Cleveland, *Rooted in Faith – Forward in Hope* was the largest fundraising campaign ever conducted by the Diocese of Cleveland. The campaign was initiated in 2010 with a goal to raise \$125 million. The campaign exceeded expectations, resulting in more than \$170 million in pledges. The formal campaign ended in December 2017.

### **How does this campaign differ from the annual Priestly Formation Appeal?**

While both efforts support our Seminaries, funds received via the annual Priestly Formation appeal directly support the Seminaries' operating costs. The Heart of a Shepherd campaign supports capital projects, the endowment for retired and newly-ordained clergy, and local parishes.

### **Is a pledge legally binding?**

No. A pledge is a good-faith commitment made under a particular set of circumstances. If those circumstances change, donors can adjust their pledge payment schedule or balance accordingly.

### **Am I able to pay my pledge using a credit card or through automatic withdrawal from my checking account?**

Yes. A donor may fulfill a pledge using a credit card or through electronic funds transfer from a checking account. For more information contact the campaign office.

### **Can a donor make a stock gift?**

Yes, stock donations are a convenient way of giving. Many donors pledge to a campaign with gifts of appreciated securities, thereby enjoying additional tax savings. Donors with specific questions regarding tax deductibility are encouraged to contact their attorney, accountant, or tax preparer. If a donor is considering a transfer of stock, they should call the campaign office at 216-902-1300 for specific instructions.

### **Can a donor make a gift from an IRA as a Qualified Charitable Rollover?**

Yes. Donors aged 70½ or older can generally reduce taxable income up to \$100,000 by making a charitable rollover gift from an Individual Retirement Account (IRA). With a direct transfer from a traditional IRA to a qualified charity such as the Catholic Community Foundation, a donor can satisfy the minimum required distribution for the year and support the *Heart of a Shepherd* campaign. Donors with specific questions regarding tax treatment are encouraged to contact their attorney, accountant, or tax preparer.



### **To what extent are gifts to the campaign tax deductible?**

Gifts to the campaign are tax deductible to the extent allowed by the law. An acknowledgement of your gift will be provided to you for income tax purposes. Donors with specific questions regarding tax deductibility are encouraged to contact their attorney, accountant, or tax preparer.

### **What is the gift request amount based on?**

Within the fundraising community, there is no strict mathematical formula that routinely provides a request amount. The amount is determined by considering your previous giving and potential giving capacity while also considering your level of engagement and how the Church of Cleveland ranks as a philanthropic priority.

### **Can I restrict my gift to go to one or more of the campaign focuses?**

Gifts or pledges of \$10,000 or higher may be restricted to one or more of the campaign focus areas.

### **Where can I find additional information on the campaign?**

You may call the campaign Office at 216-902-1300.



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