

# Greetings!

Prepared for Clergy Enrichment Day  
September 2026



Our Mission:  
**Strengthen**  
*Yours*



# Hello & Thank You



## **Elizabeth Williams, MS**

Executive Director of the Catholic Foundation since April 2025.

15+ years agency communications strategy experience, working Fortune 500s such as DuPont Pioneer, Dell, AT&T & SAP.

Southern MN dairy farmers daughter, entrepreneur, wife & mom of 3

# Today's Agenda



*Thank you to those  
who took our survey!*

- **State of Giving Today**
- **Fostering a Culture of Stewardship**
- **Getting Practical**
  - **Financial Communications**
  - **Revenue Streams & Time Horizons**
  - **Endowment Building**
  - **What We Can Learn From Each Other**



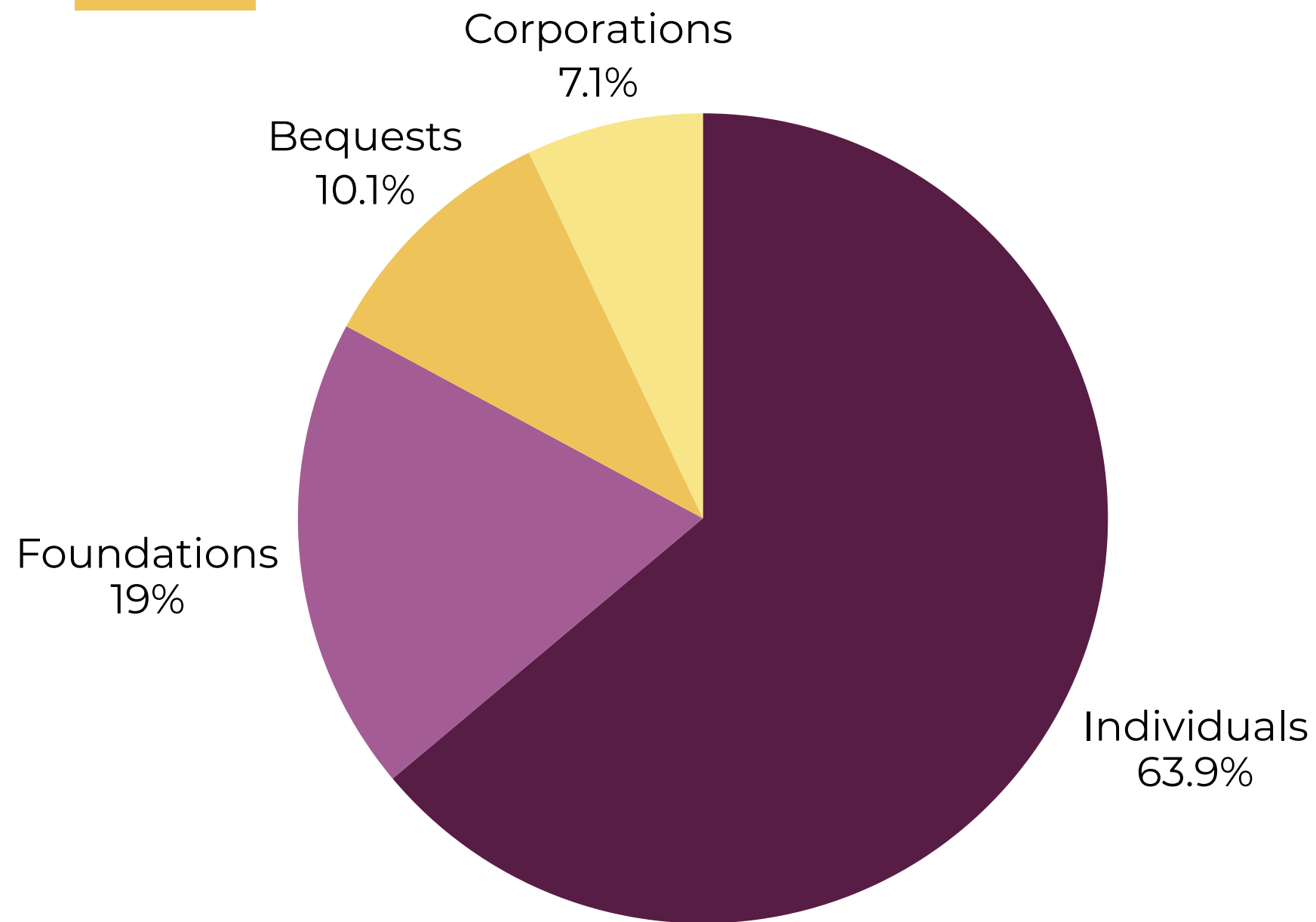
**Catholic  
Foundation**  
of Southern Minnesota

# State of Giving



Where You Invest **Matters**

# 2025 Charitable Giving By Source



| Gift Source  | Up/Down 2025 vs 2024 | Inflation-Adjusted |
|--------------|----------------------|--------------------|
| Individuals  | +4.1%                | +1.4%              |
| Foundations  | +5.7%                | +3%                |
| Bequests     | <b>+19.7%</b>        | +16.6%             |
| Corporations | +3.1%                | +0.5%              |

- Bequests - SOARED!
- Individual Giving - Donor Advised Funds (DAFs) hold \$325B waiting to be granted to charities

# Where Did Charitable Dollars Go?

| Type of Recipient Organization | Up/Down 2025 vs 2024 | Amount Given |
|--------------------------------|----------------------|--------------|
| Religion                       | +2.4%                | \$151.5 B    |
| Human Services                 | +5.3%                | \$99.5 B     |
| Education                      | +11.7%               | \$92.0 B     |
| To Foundations                 | +16.2%               | \$79.0 B     |
| Public-Society Benefit         | +11.6%               | \$72.0 B     |
| Health                         | +6.1%                | \$61.4 B     |
| International Affairs          | +4.1%                | \$33.0 B     |
| Arts, Culture & Humanities     | +7.5%                | \$27.3 B     |
| Environment & Animals          | +11%                 | \$24.5 B     |



Data Source: Giving USA 2026 Annual Report

# How We Apply This to Our Parishes

- While religion remains the highest \$\$ of giving, adjusting for inflation, it technically decreasing or stable year over year.
- Education, public-society benefit and environment / animals saw more than 10% growth last year and the largest annualized rates of change over the last five years.

**Takeaway:** People will continue to give outside of religion until we change something, BECAUSE people give to orgs they...

1. **Are involved in**
2. **Whose mission they believe in**
3. **When they believe their gifts make a difference**

# How We Apply This to Our Parishes

- Bequest gifts (from someone's will after they pass) are literally soaring, indicating the generational wealth transfer that we've been expecting is underway
- The average person leaves 14% of their will to charity.

## Tell Your Neighbor...



- Have you asked your parishioners to consider you in their wills? Does your parish have a culture of stewardship?
- Does your parish communicate long-term plans that instill confidence in parishioners so that they feel like they can trust you in leaving a legacy gift?

# Giving is Changing

## Takeaways:

- We must consider WHO we're talking to
- Expect offertory to decline annually

| SILENT GENERATION                                                                                                                                                                                                             | BABY BOOMERS                                                                                                                                                                                                               | GENERATION X                                                                                                                                                                                             | MILLENNIALS                                                                                                                                                                                                             | GENERATION Z                                                                                                                                                                                                                        |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <br><b>80+</b><br>Born 1945 or earlier<br>They give out of loyalty and a strong sense of responsibility to their parish and faith community. | <br><b>62–79</b><br>Born 1946–1964<br>They give generously to organizations and churches they trust and want to leave a lasting legacy. | <br><b>46–61</b><br>Born 1965–1980<br>They want to know their gift is being used wisely and making a real difference. | <br><b>30–45</b><br>Born 1981–1996<br>They are more likely to give when they feel personally connected to the mission and community. | <br><b>14–29</b><br>Born 1997–2012<br>They are motivated by causes they care about and want opportunities to take action, not just donate money. |

**Remember:** Generations overlap! People are more than their age—life experience, faith journey and values shape how they give.

# The Pareto Principal

## Applied to Fundraising:

- 14% of donors give **89%** of gifts (\$1,000+)
- 4% of donors give **76%** of gifts (\$5,000+)

Source: AFP Fundraising Effectiveness Survey

## Takeaway:

- Make your fundraising plans **top to bottom**.
- Mass fundraising has a role to engage and excite your full community, but **don't waste resources** on mass mailers, events **before** you've secured the majority of your funding from a handful of people.

**Tip:** Build relationships with these people now. Don't wait for an emergency.



# State of Giving Takeaways

- How people give today is different than 20 years ago. And continues to evolve.
- Expect less from offertory over time.
- Bequests are rising - ASK!
- Communicate differently by generation.
- Fundraise from the top down.

# Stewardship is Discipleship



# Reflecting on Stewardship

The Church has long taught that stewardship is not simply a fundraising concept. In their pastoral letter, Stewardship: A Disciple's Response (1993), the USCCB describes stewardship as **“an expression of discipleship”** and remind us that **“once one chooses to become a disciple of Jesus Christ, stewardship is not an option.”**

# Reflecting on Stewardship

Their Pastoral Letter reminds us that Christian stewardship means we:

- Receive God's gifts gratefully
- Cultivate them responsibly
- Share them lovingly with others
- Return them with increase to God

# Stewardship as Sanctification

**The “Priest” of the priest’s role.**



What role does stewardship play in your parish as a way of making holy?

How often are we discussing sacrifice of time, talent & treasure with our parishioners?

## **Priest as Priest:**

Celebrates the sacraments  
Sanctifies & offers sacrifice  
Intercedes for God’s people

# Teaching Stewardship

## The “Prophet” of the priest’s role.



What level of understanding does our parish have about stewardship? Is stewardship lived out?

What’s worked well for you in teaching stewardship in the past? What hasn’t?

### **Priest as Prophet:**

Proclaims the Gospel

Teaches & Forms Disciples

Illuminates consciences with the Truth

# Applying Stewardship to Parish Finances

The “King” of the priest’s role.



Are we managing parish resources proactively and wisely?

Like the Parable of the Talents?

What are other parishes doing to plan for the long term?

## **Priest as King:**

Shepherds & governs the people of God

Builds unity & communities

Serves with humility & justice

# Imagine If...



What does stewardship look like at its best in your parish or role?

What might be a few steps you might need to take to make it so?

# Stewardship IS Discipleship Takeaways

- We are called as Catholics to steward our gifts wisely as a part of discipleship
- Creating a culture of stewardship is the first step towards long-term financial stability

# Let's Get Practical



Where You Invest **Matters**

# Today's Agenda

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- Fostering a Culture of Stewardship
- **Getting Practical**
  - **Financial Communications**
  - **Revenue Streams & Time Horizons**
  - **Endowment Building**
  - **What We Can Learn From Each Other**

# In our listening exercise in 2025, we heard things like...

- “**We want our priest to ask**, but he’s not comfortable. People trust and respect their priest and know he’s not asking for himself” - Finance Council Member
- Parishioners express **confusion** about parish finances, leading to **mistrust or disengagement**. Some families noted that they “don’t know what’s happening” financially or operationally unless it is communicated clearly and consistently.
- People would consider giving but they’re **not familiar with what the parish needs are or how decisions are made**

# A Case Study: Pax Christi's Roof Campaign

**Issue:** Unplanned Roof Repair

**Solution:** Leadership team brainstorm how to best communicate need & urgency. Clear, transparent messaging:

- Presentation at Mass by **Director of Maintenance**
- **Photos** of leaks & drawings from the roofing company
- Weekly **fundraising thermometers** in the bulletin & gathering space
- **Regular pulpit updates**

# A Case Study: Pax Christi's Roof Campaign



“Have a great team. Have the skeptic in the room, but also the optimist. **Bring in those closest to the concern.**”  
- Jill Olson, Administrator



“Directed giving works **because it answers the question** every donor quietly asks: **does my gift truly matter?** The Pax Christi community proved it. When people know their gift has a face and a purpose, they don't just donate, they become part of the mission.” - Jeff Snider, Parishioner, Teacher & CFMSM Board Member

# Success Stories to Share?

## Stewardship in the Liturgical Year

What seasons or days do you think are good points in the liturgical calendar for talking about stewardship?



# Fundraising Communication Pointers

1. Be direct and transparent
2. Use visuals
3. Tell a story
4. When possible, tie the need to an outcome
5. Give one, clear next step



**Let's Put Pen to Paper**

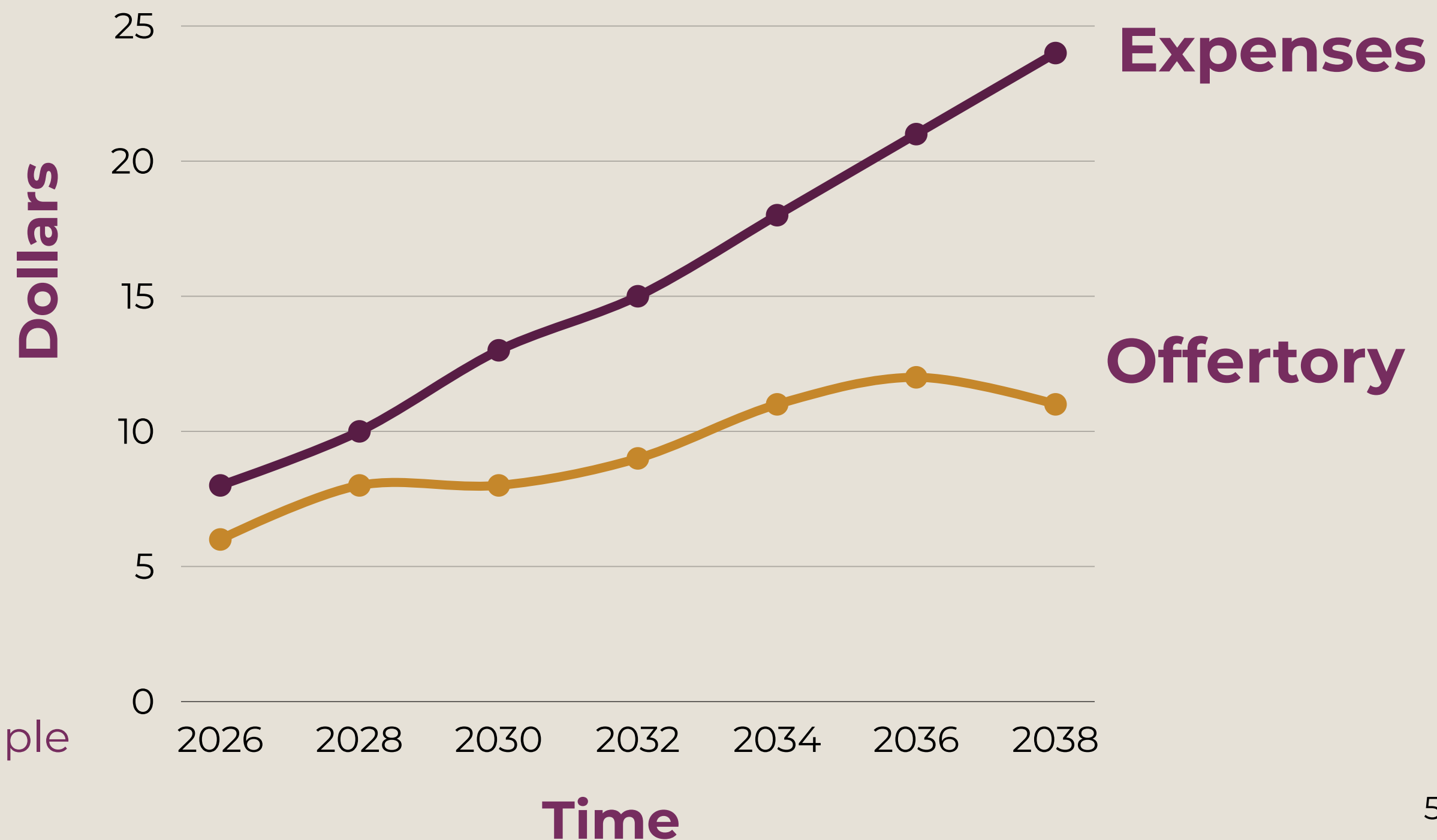
# Finance Communications Takeaways

- Timely & transparent communication with parishioners is critical to fundraising success (including offertory)
- Be direct and transparent
- Use visuals
- Tell a story
- Tie the need to an outcome
- Give one clear next step

# Revenue Planning



# The Reality of Offertory as Revenue Stream



Hypothetical Example

# Reflecting on Revenue Streams

- Annual Offertory
- Endowments
- Bequests/Estate Gifts
- Donor Advised Funds
- Grants & Other External Funding
- Annual Fundraising Events
- Program or Sacramental Fees
- Facility Rentals
- What else?



Which revenue streams are strongest in your parish?

Which need work?

# Revenue Streams

- Annual Offertory
- Endowments
- Bequests/Estate Gifts
- Donor Advised Funds
- Grants
- Other External Funding
- Annual Fundraising Events
- Program, Sacramental Fees
- Facility Rentals

# Accounts

Checking

Savings 1  
Savings 2

Money Market

CD 1

CD 2

CD 3

CD 4

CD 5

Investment Account 1  
Investment Account 2  
Investment Account 3

Endowment 1  
Endowment 2

Operating Budget

Pop Up Expenses

Long Term Planning?

It's Complicated

# Stewardship Simplified: Bucket Funds by Time Horizons



|                                                      | Risk/Reward Desired | Notes                                                                                                                                                                                                                                                      |
|------------------------------------------------------|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| General Operating                                    | None                | <ul style="list-style-type: none"> <li>Cash in / Cash out</li> <li>Held in checking</li> </ul>                                                                                                                                                             |
| Operating Reserves & Imminent Capital Exp. – <1 Year | Little to None      | <ul style="list-style-type: none"> <li>3-6 months for large parishes; Up to 12 months for smaller parishes</li> <li>Based on offertory stability, possible ‘excess’ layer of cash reserves for financial stability, liquidity</li> </ul>                   |
| Capital Reserves – 1-5 Years                         | Low to Medium       | <ul style="list-style-type: none"> <li><b>Reserve investment portfolio orientation to hold non-endowed funds as a backstop, earn additional income.</b></li> <li>Potential avenues range from bond-only vehicles to ‘balanced’ investment funds</li> </ul> |
| Long Term Savings & Endowments – 3-5 Years+          | High                | <ul style="list-style-type: none"> <li>Emphasize long-term growth and real value of assets, as well as annual spending</li> <li><b>Recommend considering fully invested portfolios, with a growth objective, for these types of funds.</b></li> </ul>      |

# Stewardship Simplified: Bucket Funds by Time Horizon Needs



|                                                      | Risk/Reward Desired |                                                                                    |
|------------------------------------------------------|---------------------|------------------------------------------------------------------------------------|
| General Operating                                    | None                | \$36,000/mo                                                                        |
| Operating Reserves & Imminent Capital Exp. – <1 Year | Little to None      | \$154,000<br>4 months operating reserves + this year's projects                    |
| Capital Reserves – 1-5 Years                         | Low to Medium       | \$162,000<br>Needed for sidewalk repair, fascia repairs, new elevator              |
| Long Term Savings & Endowments – 3-5 Years+          | High                | \$63,000<br>New roof by 2032<br>\$50,000<br>Endowment (sustainable revenue stream) |

# Revenue Planning Takeaways

- It's important to the long-term health of the parish to have multiple revenue streams
- Improve your financial stewardship by mapping needs & dollars to time horizons. Then invest accordingly.

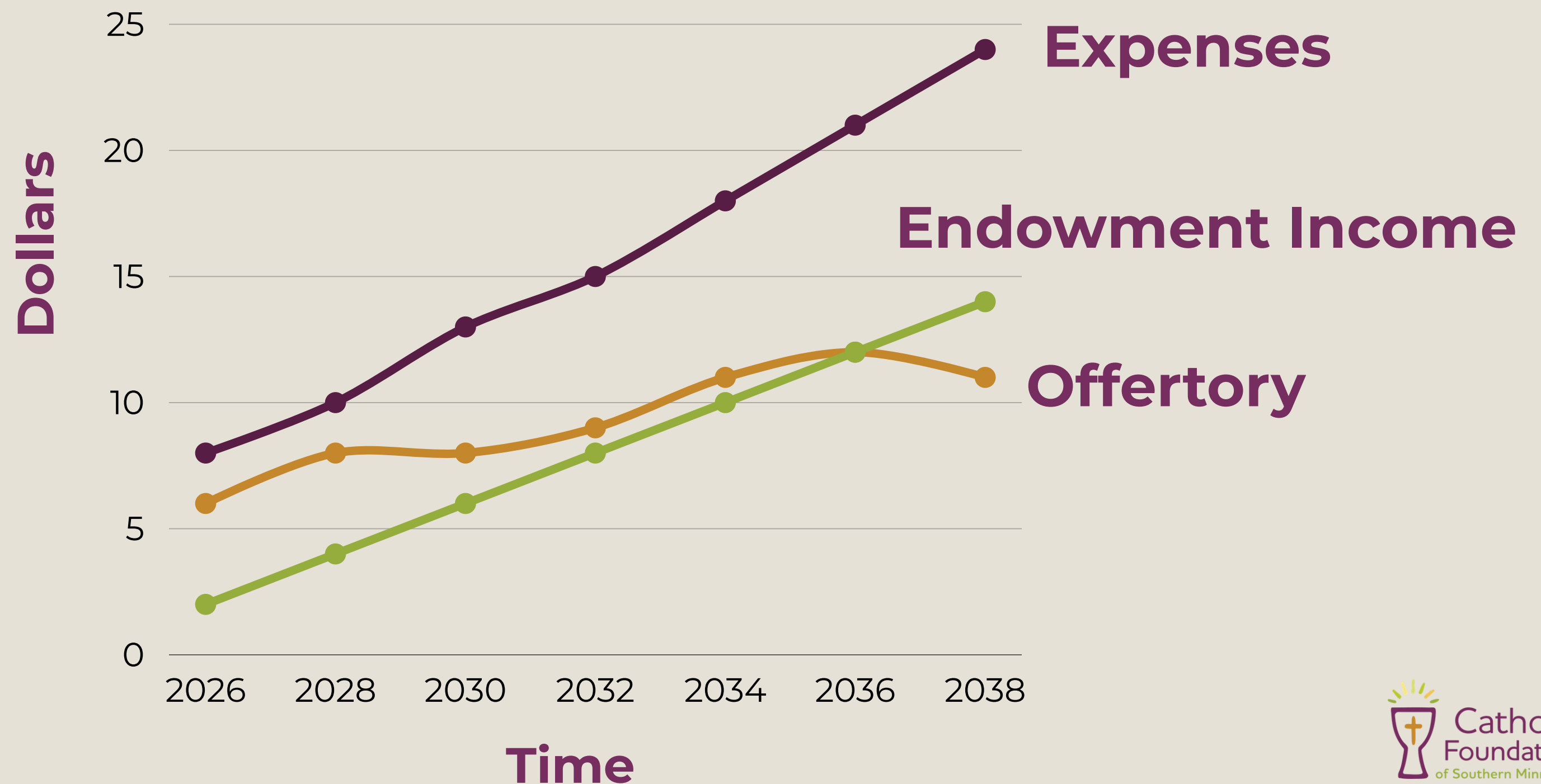
# Endowments



# Why Spend Your (*Very Limited*) Time on Endowments?

- **Fewer households are donating charitably each year.**  
Less than half of American households now give charitably, compared to more than two thirds giving charitably two decades ago.
- Weekly giving nationally dropped from 49% of churchgoers in 2015 to **39% of churchgoers give in 2023.**
- Weekly church attendance in the U.S. has declined from 42% in 2000 to ~30% today.
- DOW-R did see an increase the last few years, but our attendance still remains below pre-pandemic attendance.

# Endowments Are Stable Income that Keep Up with Inflation!



# Endowment Basics

- An endowment is a **permanent fund** where gifts are invested, and a portion of the earnings are distributed each year to support parish needs.
- The original gifts, called corpus or **principal, are preserved and grow over time**
- While **earnings provide ongoing support** over time.
- Additional gifts can be added to the fund at any time and are typically added to the corpus.

# \$500,000 Corpus

Year 1

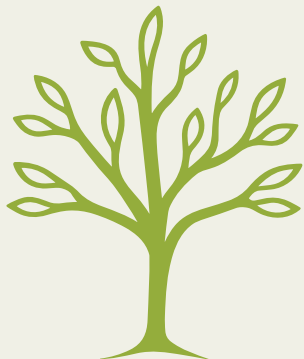
Fund Grows to  
\$535,000



\$25,000 available  
for distribution in  
year 1

Year 15

Fund Grows to  
\$672,934



\$32,987 available  
for distribution

Cumulative distributions:  
\$432,335

Year 25

Fund Grows to  
\$820,303



\$40,211 available  
for distribution

Cumulative distributions:  
\$800,757

Year 50

Fund Grows to  
\$1,345,974



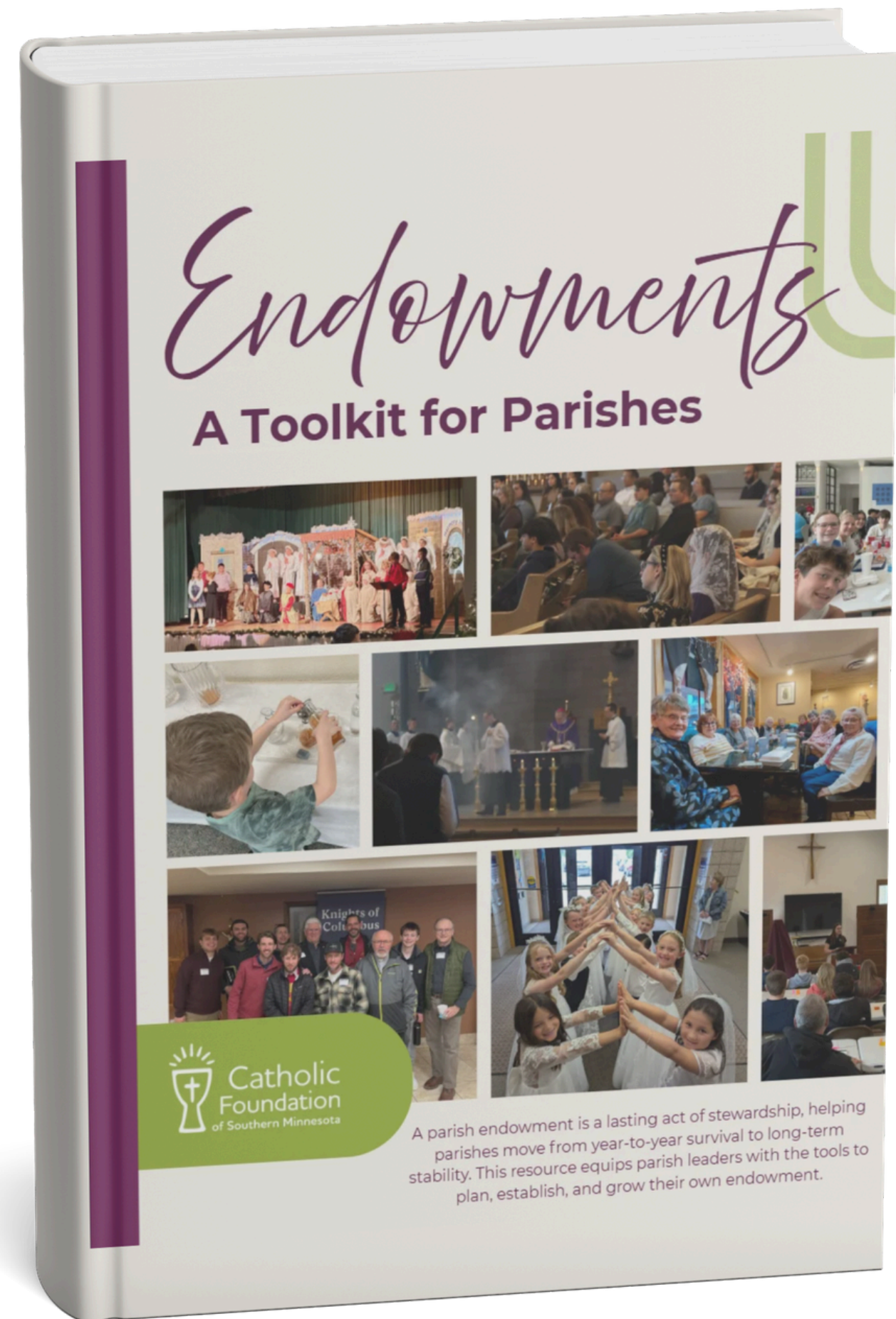
\$65,970 available  
for distribution

Cumulative distributions:  
\$2,114,485

# We Made This Toolkit for You!

Each Parish Cluster Received  
One in the Mail

Ask for more copies  
or access online:  
**CatholicFSMN.org/  
Endow-Toolkit**



# Endowment Takeaways

- Endowments are powerful tools to ensure the future of the local church
- If your parish, school or cemetery doesn't have one yet, creating one is urgent.

# We're Here to Help

- Read new articles monthly
- Sign Up for our monthly Enewsletter
- Speaks at no cost to finance councils
- Follow on Facebook or X.com

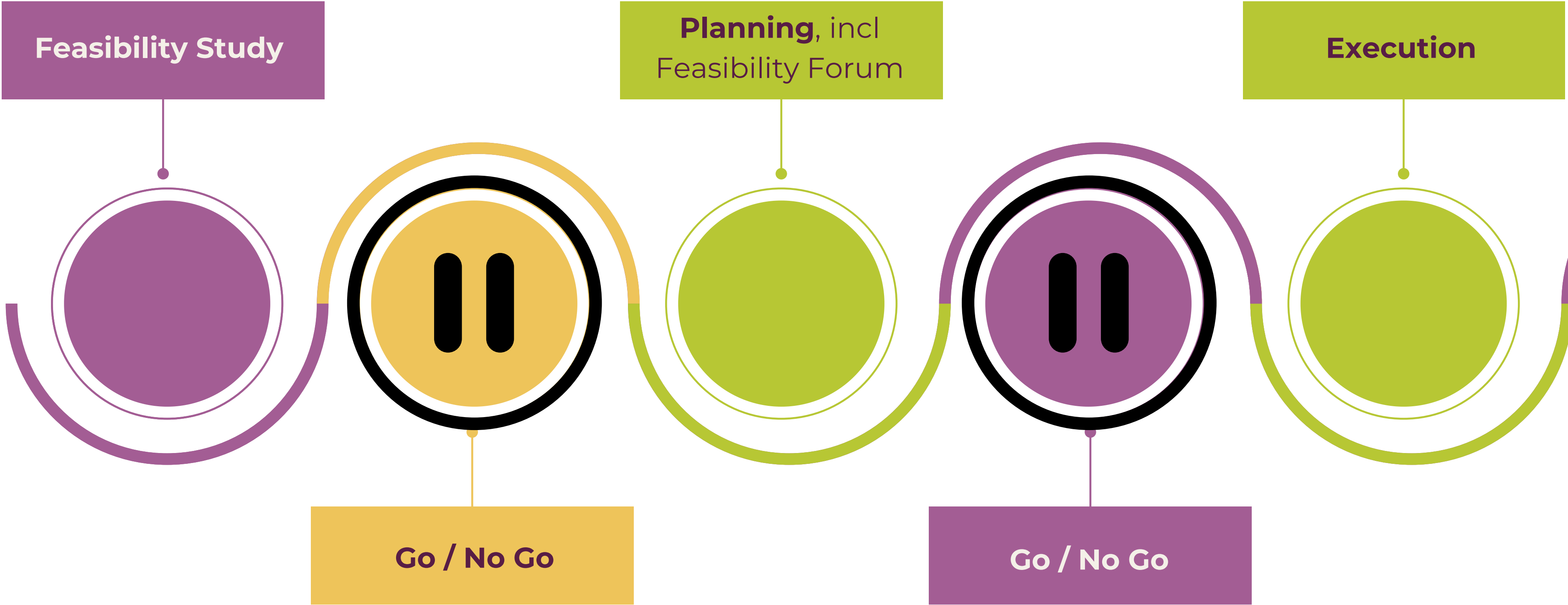


# Capital. Campaigns



Where You Invest **Matters**

# Typical Campaign Process and Decision Points



# Why Conduct a Feasibility Study?

A feasibility study helps our parish discern wisely before moving forward with a major project. It provides clear, objective insight into our community's readiness—spiritually, financially, and practically

- **Identifies Strengths & Weakness:** Surfaces questions, hesitations, and ideas that leadership might not yet be aware of.
- **Estimates Potential Financial Support & Reduces Risk:** Ensures we move forward with confidence, stewardship, and responsible planning
- **Clarifies Parish Priorities:** Confirms whether the proposed project aligns with the hopes and needs of parishioners – You have a strong start on this already with the survey.
- **Builds Unity and Transparency:** By inviting our largest donors into the conversation early, we strengthen trust and create shared ownership

# Campaign Execution Looks Like



## Fundraising.

- Large Donor Nurturing & Pledges
- Tier Two Donor Nurturing, Calls, Pledges
- Booths after Mass
- Direct Mail
- Bulletin Inserts
- Mass Announcements
- Large Donor Nurturing & Pledges
- Messages and Graphics for Posters, Website, Social Media, PowerPoint/Slideshow

## Gift Receiving.

- Pledge Management
- Receive Gifts of Cash, Check, Stocks, Commodities, and other non-cash assets
- Online Giving Landing Page
- Gift Acknowledgements
- Tax Receipts

## Hold & Distribute Funds.

- We can hold your donations in checking or money market
- Or, invest in an agency fund in our low risk or long term returns pool
- Then you take distributions when you're ready with no fees

# Campaign Planning Looks Like



**Overall Campaign Plan:** Prospect list, solicitation strategies, refined giving estimates, timeline, key benchmarks, and structure needed to reach campaign goal

**Policies** Updating or creating gift acceptant policies; campaign recognition & naming policies

## **Training staff & volunteers**

Sufficient knowledge to be activated as confident, effective members of campaign leadership

**Campaign Budget:** Including aligning campaign expenses with expected gifts and a multi-year forecast

**Campaign Structure** Including necessary committees, task forces, recruiting, training, goals, budgets & timelines for each group

## **Hosting Feasibility Forum**

For those who participated in feasibility study to share the results and parameters of the approved campaign

## **Communications Strategy**

Capable of effectively informing & motivating multiple audiences

## **Donation tracking plan:**

Donation & donor tracking systems to ensure line of sight into campaign progress and sound stewardship

**Public collateral** Including case statement, gift agreement, and other items needed for ID, cultivation & solicitation of prospective contributors

# Takeaways

- Major capital campaigns have important steps to follow that are proven to result in the best fundraising outcomes
- Some parishes do it fully in house, often with talented volunteers. Other parishes use agencies for all or some help.

# Appendix



# Catholic Value Investing



The issue areas covered by the Principles for USCCB investments can be divided into SRI-based negative screening and ESG-based positive screening:



## The Foundation's Implementation Strategies Include:

1. **Avoidance** - divest from companies whose products and/or policies conflict with teachings
2. **Active Corporate Participation** - casting votes on proxies or resolutions seeking to influence corporate change
3. **Positive Strategies** - support companies with aligned values and/or investments that produce social good





# How It Works



1

Trustee, Fin.  
Council or  
Priest

## WE LISTEN

- *What do you hope to achieve?*
- *Consult with our finance advisor if desired*
- *Complete onboarding survey, including selecting Low Risk or Long Term Returns Pool*

2

Priest Signs  
Bookkeeper  
Transfers

## YOU TRANSFER

- *Templated agency agreement with Pastor's one signature*
- *ACH or Check*
- *No social security numbers or other complications*

3

You Decide  
who has access:  
Finance  
Council, Priest,  
Bookkeeper

## YOU EARN

- *Monthly statements with self-service portal access*
- *Always-on local customer service by phone or email*

4

Priest or Other  
Authorized  
Person Signs

## WE DISTRIBUTE

- *Any authorized officer can request or schedule a distribution any time with a signature*
- *No fees. Receive funds in about a week*

**Where You Invest Matters**

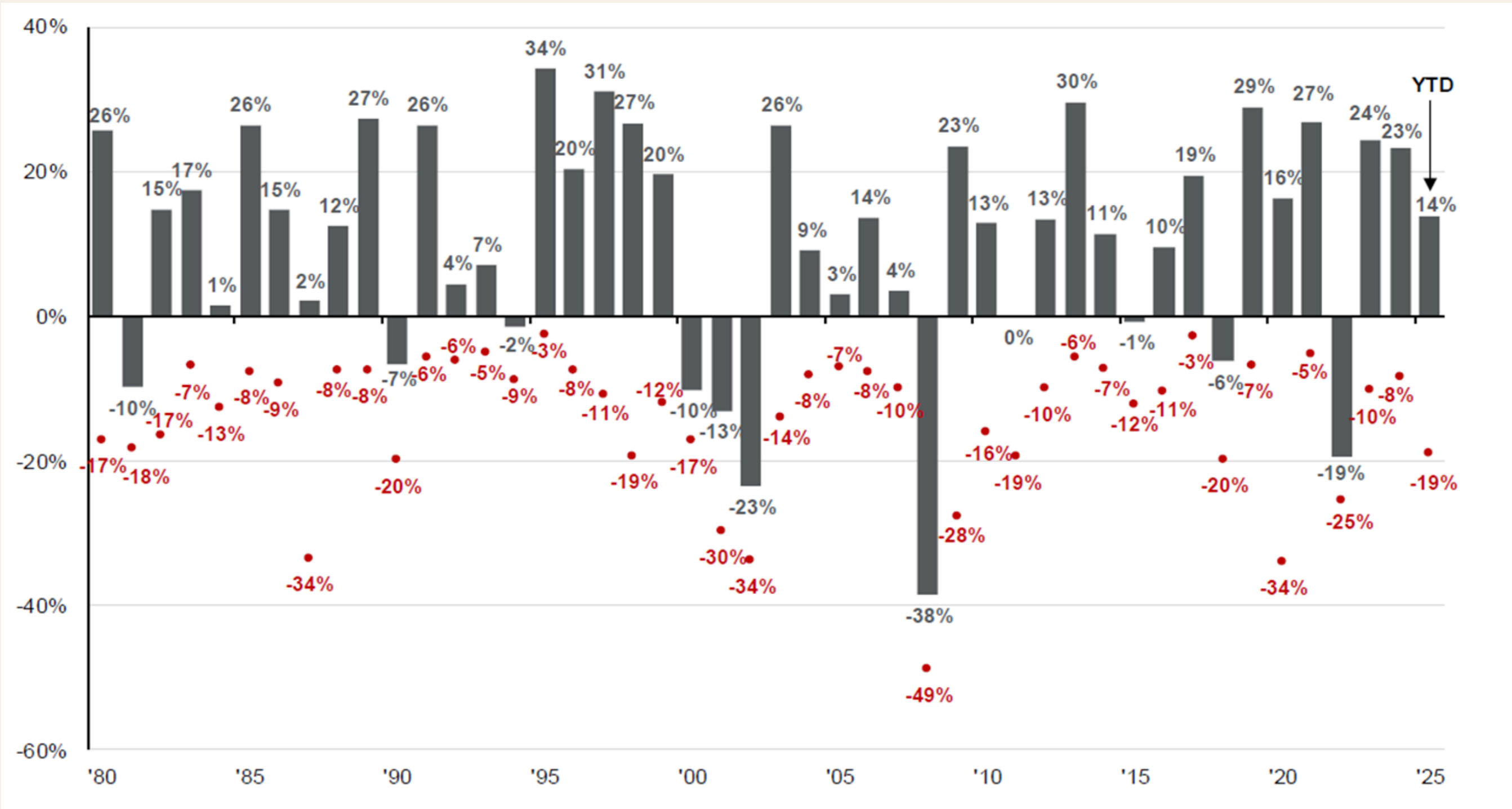
# The Foundation Designed Our Pools Around Parish Time Horizon Needs

|                   | Investment Philosophy                                                                                                                          | Time Horizon | Target Returns                               | Investment Strategies | Average Returns                | USCCB Guidelines |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------|--------------|----------------------------------------------|-----------------------|--------------------------------|------------------|
| Long-Term Pool    | Growth of capital, with an increased risk profile expected. Designed for long-term or permanently endowed capital.                             | 3+ Years     | CPI + 5%                                     | 10                    | 14% 3-Year<br>7% since 2000    | Yes              |
| Short-Term Pool   | Preservation of capital and income generation are the primary objectives, with a secondary objective of capital appreciation.                  | 1-5 Years    | CPI + 3%                                     | 5                     | 7.7% 3-Year<br>6.9% since 2019 | Yes              |
| Fixed Income Pool | Preservation of capital and income generation with the primary objective of protecting from inflation losses. Maintain liquidity and low risk. | 0-2 Years    | CPI +<br>(Consumer Price Index or Inflation) | 3                     | Established Sept 2026          | Yes              |

# Why Equities?

## A Historical Perspective on Equities

Despite significant annual volatility, equities have had strong performance over time

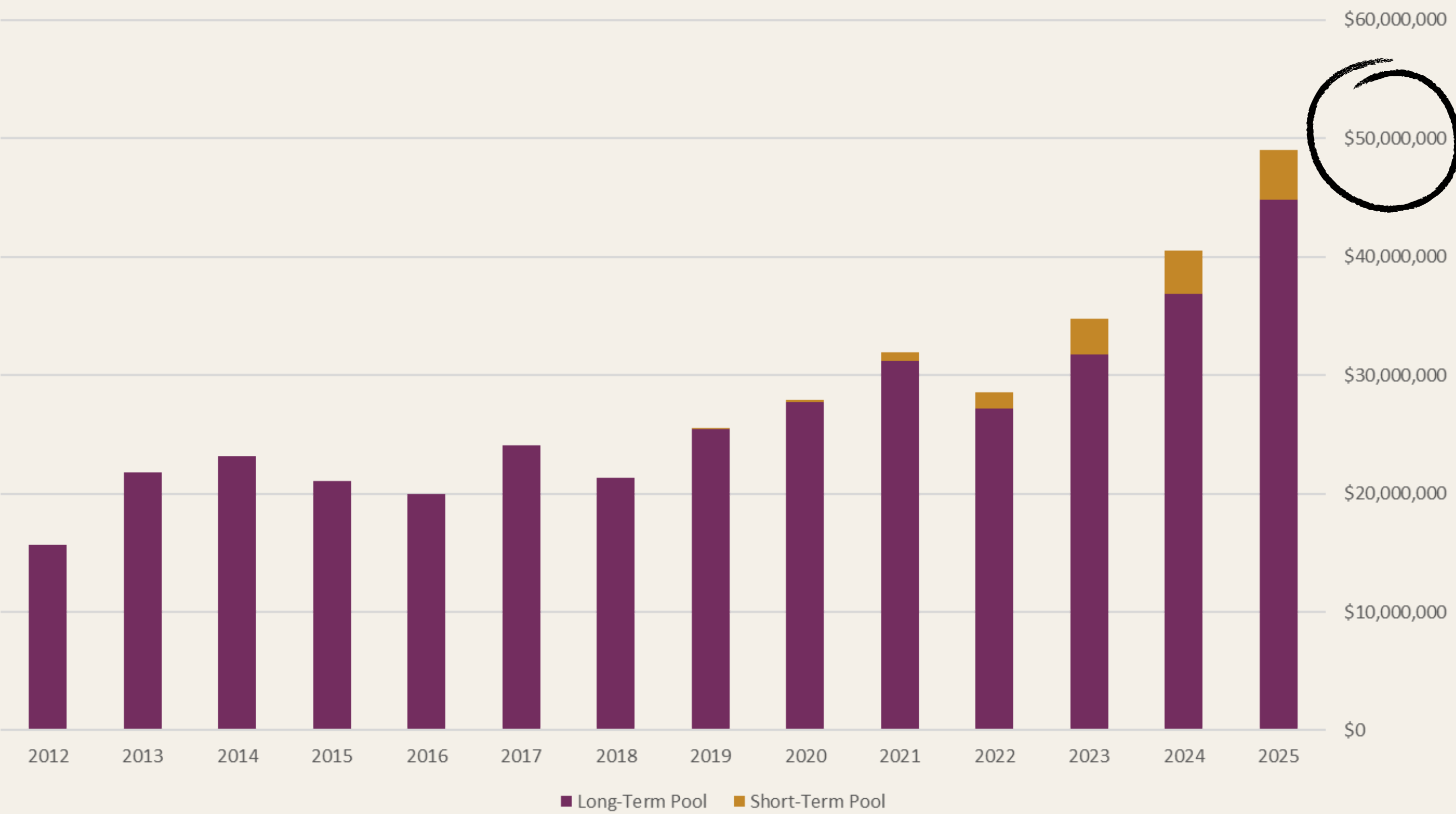


And, when you invest for the long-term mission of your ministry, all you have is time.



Where You Invest Matters

# Growth of Our Investment Portfolio



Dec '25, we broke \$50M thanks to more parishes joining and strong market performance



Where You Invest Matters



# Helping Catholics Give: Stewardship Services



Stewardship, Investment & Philanthropy  
Presentations & Resources

Feasibility Studies &  
Financial Planning

Capital Campaigns &  
Large Donor Engagement

Legacy Planning

Bespoke Consulting



# How We Serve Southern MN



## Asset Development

Protect & grow the gifts of Catholics. Over \$54M managed today; \$33M+ of that is held as "Agency" funds - owned by Catholic organizations



## Granting

We help Catholics leave the legacy they desire! \$1.2M granted last fiscal year to Catholic causes such as faith formation, seminary education, Catholic schools, capital improvements & more.



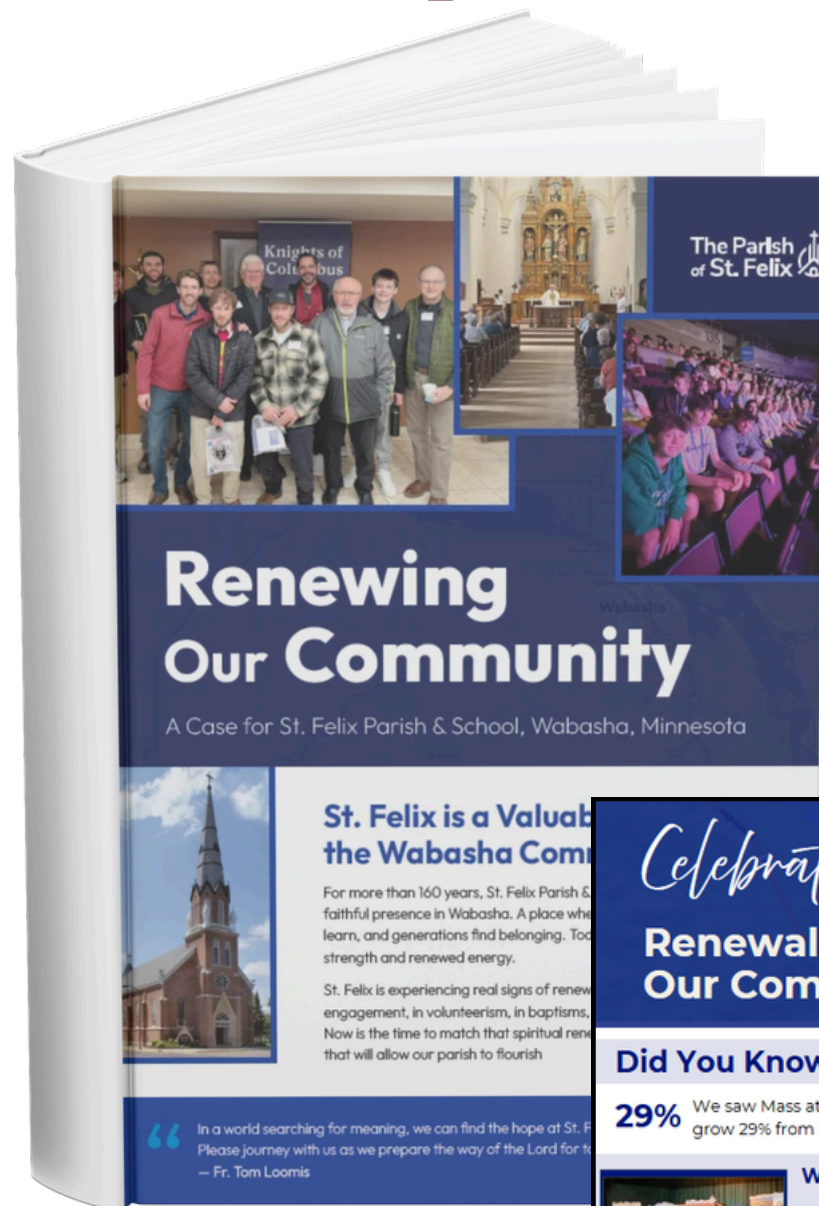
## Community Leadership

Diocesan wide listening exercise, parish stewardship services & free resources... are just the beginning

# Capital. Campaign Samples



# Sample Work: St. Felix



**Renewing Our Community**  
A Case for St. Felix Parish & School, Wabasha, Minnesota

**St. Felix is a Valuable Presence in the Wabasha Community**

For more than 160 years, St. Felix Parish & School has been a faithful presence in Wabasha. A place where people learn, and generations find belonging. Today, the parish is experiencing real signs of renewal, engagement, in volunteerism, in baptisms, in strength and renewed energy.

St. Felix is experiencing real signs of renewal, engagement, in volunteerism, in baptisms, in strength and renewed energy. Now is the time to match that spiritual renewal with action that will allow our parish to flourish.

*"In a world searching for meaning, we can find the hope at St. Felix. Please journey with us as we prepare the way of the Lord for today and generations to come."*  
— Fr. Tom Loomis

**The Parish of St. Felix**

## Phase 2 Facilities Updates

**A Parish Community in Renewal**

With your generous support of time, talent and treasure, we will increase **accessibility for all ages, improve hospitality** and address **all necessary repairs** to care for our sacred, historic Church.

**School Updates:**

- Heating & cooling the auditorium
- School bathroom updates

*"In a world searching for meaning, we can find hope at St. Felix that only Jesus can offer. Please journey with us as we prepare the way of the Lord for today and generations to come."*  
— Fr. Tom Loomis

**Church Updates:**

- Accessible 3rd Street entrance & sanctuary entrance
- Bluetooth hearing assist loop
- New family/greeting space in back with bathroom
- Church plaster, painting, pews & flooring
- Adoration chapel and music room
- Lighting upgrades and roof

**Celebrate!**

## Renewal In Our Community

**Did You Know?**

**29%** We saw Mass attendance grow 29% from 2023 to 2025!

**550** families call St. Felix home

**We are Forming Our Children in Faith & Character**

**53** Students are enrolled in St. Felix school for the 2026-27 school year. Many of the families who come to the school find their way into the life of the parish, a quiet but powerful form of evangelization that strengthens the whole community.

**There is Renewed Energy Across All Age Groups**

Parish life is thriving across all ages, and faith formation is experiencing real renewal. Our young people are engaging more deeply than in previous years, showing a community growing together in faith.

**Pastoral & Finance Councils**  
Social Concerns Committee; Serra Club  
Knights of Columbus; Mom's Bible Study  
1st Financial Life Ladies Group  
St. Joe's Quilters Group; Youth Masses  
Church ladies who serve funeral luncheons  
Contemporary Choir; Traditional Choir  
Dozens of Youth Attend Camps & Events  
Weekly Faith Formation for grades K-10  
Monthly Youth Group for grades 7-10  
Weekly Ministry to 10-12 Homebound  
Fundraising for wide range of community, school and parish needs



Catholic Foundation of Southern Minnesota  
Published by Elizabeth Williams • November 2023

"For where two or three gather in my name, there I will be with them."  
He certainly was!

What a night a few weeks ago when nearly 200 parishioners gathered in the Wabasha, MN auditorium after Saturday evening Mass to discuss the future of the parish. To build the community that the Lord has called us to be.

We shared in a family meal, gave parents a night of Father Loomis opened us in prayer, reminded the parish how far they've come and challenged them to look to the future.

Then, Finance Council member, Dan Stenzel showed off all of the work that has already been done on the facilities - made possible through the generous giving of parishioners over the years and the careful stewardship of their finance councils.

Deacon John Hust spoke about building up the Church. Not just the physical Church building but the people - the Body of Christ in our community.

Inspired, we set out to spark new ideas and create plans of action to create the vibrant faith community we want to see in Wabasha. Elizabeth, our Executive Director, led the parish adults through two breakout sessions where they first dreamed and then created action plans.

Many hands made light work though - from the beginning of planning to setup and cooking all day Saturday to tear down. If you want a snapshot of a faith community living together, look no further than Wabasha.

We can't wait to see what else the future holds for St. Felix Parish and School. Thank you so very much for allowing us to be a part of this journey with you!

#dreambig #thethechurch #community



## St. Felix Church & School Facilities Master Plan

Proposed Phases Based on Funding & Timing

We have a bold opportunity to sustain our parish and school's sacred missions, invest in the future of our vibrant Catholic community, and build a legacy of a faith that endures.

### Phase 1: Exterior Repairs

**Spring & Summer 2025**

Why? Repair necessities to maintain building function and safety

- Gymnasium roof: brick, mortar & caulking repairs
- Church brick repairs, facia painting & Stained Glass glazing
- Church main entrance repairs

### Phase 3: Gathering Space

Why? Create space for community gatherings for generations to come

- Gathering space added, connecting Church and Office
- Kitchen/Serving
- Multipurpose room space for faith community
- Large Gathering Space
- Additional Restrooms

### Phase 5: Rectory

Why? Modernize living arrangements

- Modest, updated living space with attached garage
- Repair existing or replace with new building, located behind the school

## Project Phases

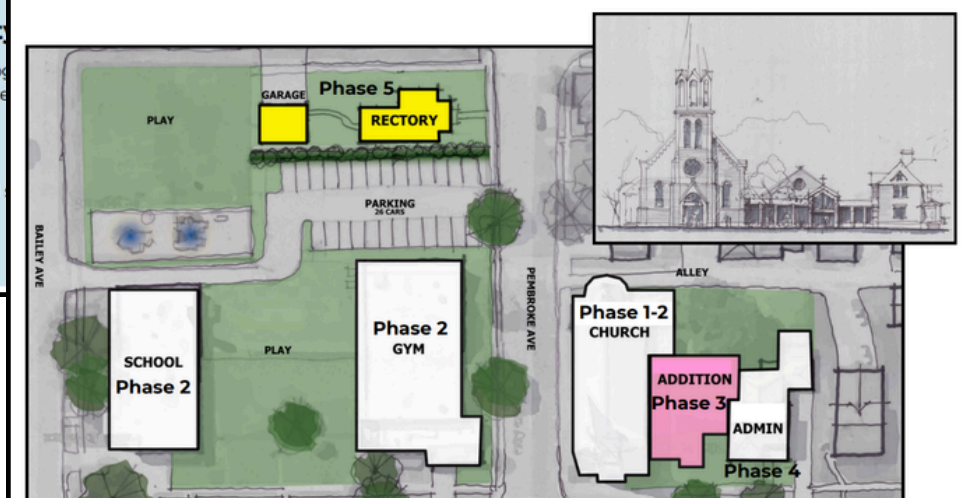
### Phase 2: Interiors, Utilities & Accessibility

Why? Increase accessibility, repair necessities and minor updates

- Make 3<sup>rd</sup> street entrance & sanctuary handicap accessible
- Bluetooth sound loop for hearing aids
- New family/greeting space with glass wall & bathroom
- Church plaster, painting, pews and flooring
- Creation of adoration chapel & music room - use wasted space
- Church lighting upgrades
- Gym heating & cooling
- School bathroom updates

## St. Felix Church & School Facilities Plan

Proposed Phases Based on Funding & Timing



"Each of you should use whatever gift you have received to serve others, as faithful stewards of God's grace in its various forms." — 1 Peter 4:10

This project guide was made in partnership with the Catholic Foundation of Southern MN. Ask us about how we can help you or your Catholic Organization steward better returns or leave a perpetual legacy.  
catholicfsmn.org | 507-858-1275 | info@catholicfsmn.org

## St. Felix Church & School Building Our Future Discussion Guide

We have a bold opportunity to sustain our parish and school's sacred missions, invest in the future of our vibrant Catholic community, and build a legacy of a faith that endures.

### Thank you.

Thank you for being part of this evening. We've heard about the exciting updates to our parish facilities — but now we turn to something even more important: the life of our community.

We want to dream together about what it means to be a parish that truly welcomes, engages, and supports one another — especially young families seeking deeper connection and purpose. Let's reflect together.

### Discussion Questions & Thought Starters.

- If you could do one thing to make our parish more vibrant and engaged, what would it be? (Encourage each person to share one idea — big or small.)
- What gives you hope or excites you about the future of the St. Felix Church and School?
- What makes you feel most connected to a parish community? (Or: When have you felt truly welcomed in a parish setting?)
- What do families need most from the Church today — spiritually, socially, or practically?
- What would help you invite others — friends, neighbors, or family — to be part of parish life?

# Execute Sample Work



**PLEASE INDICATE MEAL CHOICE FOR EACH PERSON:**

- ROSEMARY ROASTED CHICKEN | Grilled chicken with boursin and sundried tomato cream sauce
- COUNTRY HAM STEAK | Sliced ham steak finished with a mustard herb sauce
- STIR FRY VEGETABLES | Fresh vegetables in a fried rice ring finished with wonton crisps and sesame seeds

Individual Dinner Cost is \$150 per person.

**NUMBER ATTENDING:** \_\_\_\_\_

Name(s) of all those attending: (Please print guests' full names)

|   | CHICKEN               | HAM                   | STIR FRY              |
|---|-----------------------|-----------------------|-----------------------|
| 1 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 2 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 3 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 4 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 5 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 6 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 7 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 8 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

(Tables seat 8 people)

**BISHOPS & RECTOR DINNER**

APRIL 17, 2026 | WITH PRESENTER MONSIGNOR JAMES SHEA

**PLEASE COMPLETE THE FRONT AND BACK OF THE FORM AND RETURN IN THE PROVIDED ENVELOPE. RSVP BY APRIL 1, 2026.**

Name(s): \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

**SEE BACK FOR MEAL CHOICE AND GUESTS ATTENDING.**

**SPONSORSHIP OPPORTUNITIES** (Check all that apply)

|                                                                                   |         |
|-----------------------------------------------------------------------------------|---------|
| <input type="checkbox"/> SACRED HEART SPONSOR                                     | \$2,875 |
| Priority seating for a table of eight: 1/2 page ad in dinner booklet              |         |
| <input type="checkbox"/> IMMACULATE HEART SPONSOR                                 | \$2,100 |
| Priority seating for a table of eight: 1/4 page ad in dinner booklet              |         |
| <input type="checkbox"/> BLESSED HEART SPONSOR                                    | \$1,575 |
| Priority seating for a table of eight: Name in dinner booklet                     |         |
| <input type="checkbox"/> PARISHES                                                 | \$1,300 |
| Priority seating for a table of eight: Parish listed in dinner booklet            |         |
| <input type="checkbox"/> SPONSOR A SEMINARIAN'S DINNER                            | \$150   |
| <input type="checkbox"/> NEW! FLORAL ARRANGEMENT                                  | \$300   |
| Decorate the event with a floral arrangement (sponsors may take home arrangement) |         |

**EVENT PROGRAM AD OPTIONS**

|                                                          |         |
|----------------------------------------------------------|---------|
| <input type="checkbox"/> FULL PAGE AD 5" X 8"            | \$1,300 |
| Two complimentary dinner tickets                         |         |
| <input type="checkbox"/> 1/2 PAGE AD 5" X 4"             | \$600   |
| <input type="checkbox"/> 1/4 PAGE AD 2.375" X 4"         | \$300   |
| <input type="checkbox"/> BUSINESS CARD AD 2.375" X 1.75" | \$150   |

I AM NOT ABLE TO ATTEND, BUT WOULD LIKE TO MAKE A DONATION: \$ \_\_\_\_\_

**SPONSORSHIP DEADLINE: APRIL 1, 2026**

For further information, or if you need assistance creating an advertisement, Contact CFSM at 507.858.1275 or [nweninger@catholicfsmn.org](mailto:nweninger@catholicfsmn.org)

☐ INVOICE ME. Individual/Business Name \_\_\_\_\_

☐ CHECK ENCLOSED — Please make check payable to: Catholic Foundation of Southern Minnesota, 507.494.8844 or at [catholicfsmn.org/bishops-and-rector-event](http://catholicfsmn.org/bishops-and-rector-event). Mail this form along with your check.

PLEASE MAIL WITH STAMP

**BISHOPS & RECTOR DINNER 2026**  
IMMACULATE HEART OF MARY SEMINARY  
C/O Catholic Foundation of Southern Minnesota  
PO Box 30098  
Winona, MN 55987

Bishops & Rector Dinner ✓

Catholic Ministries Appeal

Seminarian Education Fund

Hearts on Fire Appeal

Ann Loomis Fund

Heart of Mary Convent Campaign

St. Elizabeth's Convent

## Register Today!

### Bishops and Rector Dinner Event on April 17, 2026

This annual dinner directly supports the Immaculate Heart of Mary seminarians in their formation. The event will include a cocktail hour, dinner, and a keynote address from this year's Immaculate Heart of Mary award recipient, Monsignor James Shea.

Guests may participate in a variety of ways, including attending the dinner, making a donation, sponsoring a seminarian's meal, or placing an advertisement in the event booklet. New this year is the opportunity to sponsor a floral arrangement. Sponsors can include their name and/or logo with the arrangement and take home a beautiful floral display at the conclusion of the evening, all while supporting seminarians.

The last day to register is April 1, 2026. All attendee information and meal selections must be submitted by this date.

Rochester International Event Center, Rochester, MN  
RSVP online or by contacting CFSM at 507.858.1275 or [nweninger@catholicfsmn.org](mailto:nweninger@catholicfsmn.org) beginning in early February.

[Donate Now >](#)

### Bishops and Rector Dinner Bulletin Insert

[Download >](#)

### Bishops and Rector Dinner Bulletin Ad 4"x2"

[Download >](#)

# Execute Sample Work



Please select ONE payment option, and ONE payable option below:

| Name                                                                                                                                       | One Gift/Pledge | Monthly  | Biannually |
|--------------------------------------------------------------------------------------------------------------------------------------------|-----------------|----------|------------|
| Address _____                                                                                                                              | \$250,000.00    | \$41,666 | \$125,000  |
| City _____ State _____ Zip _____                                                                                                           | \$100,000.00    | \$16,666 | \$50,000   |
| Email _____ Phone _____                                                                                                                    | \$50,000.00     | \$8,333  | \$25,000   |
| I/We wish to support the <i>Gifts from the Heart</i> Campaign as follows:<br><i>Your gift is tax deductible.</i>                           | \$25,000.00     | \$4,166  | \$12,500   |
| <input type="checkbox"/> Check Enclosed Payable to: Catholic Foundation of Southern Minnesota                                              | \$10,000.00     | \$1,666  | \$5,000    |
| <input type="checkbox"/> Credit Card (See reverse side)                                                                                    | \$5,000.00      | \$833    | \$2,500    |
| <input type="checkbox"/> Automatic withdrawal from Checking Account                                                                        | \$2,500.00      | \$416    | \$1,250    |
| Contact Amie Pierce at (507)858-1275                                                                                                       | \$1,800.00      | \$300    | \$900      |
| Payable: <input type="checkbox"/> One Time Gift <input type="checkbox"/> Monthly (Jan. 2019-June 2019) <input type="checkbox"/> Biannually | \$1,000.00      | \$166    | \$500      |
| <input type="checkbox"/> Other _____                                                                                                       |                 |          |            |

Signature \_\_\_\_\_ Date \_\_\_\_\_

Total Gift/Pledge \$ \_\_\_\_\_ Initial Payment \$ \_\_\_\_\_ Balance Due \$ \_\_\_\_\_

**Credit Card** (debit cards with Mastercard or Visa logo accepted)

Please charge my **Gifts from the Heart** donation of \$ \_\_\_\_\_ to my:

☐ Visa ☐ Mastercard ☐ American Express ☐ Discover

Account # \_\_\_\_\_ Exp. Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Cardholder Name \_\_\_\_\_

☐ Please charge my credit card one time for the full amount of my pledge.

☐ Please charge my credit card \$ \_\_\_\_\_ per month until my pledge is paid in full.

☐ Please charge my credit card \$ \_\_\_\_\_ biannually until my pledge is paid in full.

ACH and Credit Card withdrawals are made on the 10th of the month.  
Biannual charge examples: January 10, 2019 and June 10, 2019.

## ANSWERING GOD'S CALL

**Insert Name Here,**

During the time that I have been blessed to serve the Diocese of Winona-Rochester, I have seen an incredible outpouring of generosity and faith. Each day, so many of you answer God's call to serve by supporting the ministries that transform lives and strengthen our community.

It is truly a time of growth and renewal. Last year, we welcomed 1,076 new Catholics into our faith through baptism. Our Catholic schools are thriving, providing nearly 4,500 students with an outstanding education rooted in Catholic values. We also celebrate the growth in youth ministries like Camp Summit, where more and more young people are coming together to grow in faith and experience God's love.

But our diocese's impact doesn't stop at the parish or school level. Partnering with Catholic Charities, we extend a helping hand to those most in need—providing food, shelter, healthcare, and support for families in crisis. These ministries are transforming lives and showing the love of Christ to our most vulnerable brothers and sisters.

This year, we are guided by the theme *Answering God's Call* for the Catholic Ministries Appeal. It's a theme that fills me with hope and inspiration as I reflect on the minister Jesus called St. Matthew, as captured in Cezanne's painting. Just as Matthew responded with joy and faith, we, too, are invited to answer God's call to serve. Together, we are called to spread God's love and mercy, not just within the walls of our churches, but far beyond—reaching out to those who need us most.

The Catholic Ministries Appeal is more than just a fundraiser. It's a way for us to come together, help others grow in their faith, provide for the poor, and continue the incredible work of Christ in our community. I invite you to make a gift to the Catholic Ministries Appeal today. Your donation will help strengthen and expand ministries that touch lives and lead people closer to Christ. Together, we can continue to build up the Kingdom of God in Southern Minnesota.

May God bless you,

*+ Robert Barron*  
Most Rev. Robert Barron | Diocese of Winona-Rochester

## What is the Catholic Ministries Appeal?

The Catholic Ministries Appeal (CMA) is a primary source of funding to help sustain and expand ministries in the parishes, Catholic schools, Newman Centers, Catholic Charities, and programs, and departments of the diocesan church.

### Why do we need these ministries?

The Catholic Church serves the needs of many people across Southern Minnesota. While some of these services are offered at the parish level, it is often more effective when many join together in ministry and service to the people of the diocese. Each diocesan ministry exists to support the work of our local parishes.

### What should I give?

**A Gift of Prayer**  
A Gift of Prayer—Pray for the Church, for our diocesan family, and for all people who support or are supported by the CMA.

**Time and Talent**  
Volunteer in your parish, school, community and in diocesan ministries.

**A Sacrificial Gift**  
Consider making a pledge or one-time financial gift. Please continue working toward your Stewardship Commitment of 10%.

If you're a Catholic in the Diocese of Winona-Rochester, our Catholic Ministries Appeal benefits you!

## How does your gift serve others?

**2025 Catholic Ministries Appeal Goal**  
**\$2,000,000**

- Faith Formation **30%** (Adult and Youth)
- Parish Services **23%**
- Evangelization **20%**
- Catholic Education **18%**
- Charitable Outreach **7%**
- Care for Priests **3%**

**How much should I give?**  
You can estimate your giving percentage based on your yearly income.

| Yearly Income | 3%      | 2%      | 1%      |
|---------------|---------|---------|---------|
| \$40,000      | \$1,200 | \$800   | \$400   |
| \$60,000      | \$1,800 | \$1,200 | \$600   |
| \$80,000      | \$2,400 | \$1,600 | \$800   |
| \$100,000     | \$3,000 | \$2,000 | \$1,000 |

## ANSWERING GOD'S CALL

### 2025 CATHOLIC MINISTRIES APPEAL

The appeal generates funding for the ministries and services benefiting every Catholic in the Diocese of Winona-Rochester.

**2025 Catholic Ministries Appeal**

### Education & Youth

**Youth & Young Adults**  
Providing opportunities for young people across the diocese so they can grow closer to Christ.

**Catholic Schools**  
Providing quality education in diverse settings, while building community and preserving the Gospel of Jesus Christ in all Catholic schools across the diocese.

**Life, Marriage, and Family**  
Supporting the growth and development of married and family life by offering a range of activities, retreats, and workshops that foster love of Christ and one another.

**Lay Formation and RCIA**  
Supporting men and women living out their Christian vocation through education, prayer reflection, and discernment.

**Faith Formation**  
Seeking to form disciples by inviting those in the diocese to a renewed personal encounter with Jesus Christ.

**Vocations**  
Inspiring men and women who are discerning God's plan for their life.

### Evangelization & Mission Advancement

**Courier**  
Keeping diocesan parishes informed of local, national, and global news that affects their church. Diocesan directors are regular contributors each month.

**TV Mass, Social Media, and Website**  
Reaching people with the Word of God where they're at, be it on a computer, a smartphone, or a television. TV Mass is broadcast weekly and social media and the website provide information of interest.

**Newman Centers-Winona and Mankato**  
Helping university students encounter Christ through a variety of activities at the two public university campuses within the diocese.

### Community Service

**Catholic Charities Social Action**  
Providing services to people in need and advocating for justice in social issues. Staff and volunteers serve more than 4,500 people a year, including families in crisis, seniors, refugees, and the poor.

### Parish Services & Outreach

**Parish Financial Services**  
Full-time diocesan staff are available daily to support parishes with accounting, benefits, and human resources needs.

**Cemeteries**  
Providing resources, support, and training for those who work in Catholic cemeteries throughout the diocese.

**Divine Worship**  
Bringing our liturgical celebrations together to celebrate God's goodness through the Roman Mass, Rite of Baptism, Ordinations, and other sacred rituals of the Church.

**Hispanic Ministry**  
There are currently 12 parishes in the diocese that offer Spanish Masses. Youth Hispanic Ministry has seen rapid growth and engagement in the last few years.

### Clergy Services

**Care for Priests**  
Underlies the work of programs related to the ongoing intellectual, spiritual, human, and pastoral formation of priests.

**Hispanic Chaplaincy**  
Providing support for Hispanic priests so they can provide programs specific to thousands of Hispanic individuals across the diocese.