To Teach Who Christ Is

- More than $400 million has been raised on the overall campaign goal of $350 million.

- This capital and endowment campaign was officially launched in January 2013 by Cardinal Francis George, OMI, who chose the theme because of the significance to his order, his vision for the Archdiocese of Chicago, and the spirit of the campaign.

- The campaign included parish campaigns and a major gift effort.

- Campaign funds benefited six elements vital to securing the future of the Archdiocese of Chicago.
Today’s Presenters

John T. Osterlund
Chief Development Officer
Archdiocese of Chicago

Bradley K. Patterson
Corporate Vice President
CCS Fundraising
Operations Team

Ciria Manzo, Rosa Aguilar, Daniel Munoz, Ingrid Carillo, Cindy Perales, Karen Whitehead and Deb Kozak.
Major Gift Team

Sean MacCready, Cynthia Manzo, Steve Messina, Madelyn Patterson, Jose Pinones, Greg Vogt and Marguerite Zappa.
Overall Campaign Success

- The major gift effort exceeded its $100 million goal in July 2015. At that time, Cardinal Blase Cupich pledged to raise an additional $25 million. He met that challenge goal a year later.

- The $145 million in major gift and bequest commitments from individuals and foundations have been raised personally by the late Cardinal Francis George, OMI, and Cardinal Cupich.

- Major gifts primarily benefit Catholic school scholarships and faith formation, and have been used to establish endowments in the Catholic Education Scholarship Trust.

- Parish phase of the campaign raised more than $253 million of its $250 million goal. The final four waves surpassed their collective goals, averaging 129 percent in gifts and pledges.
## Parish Wave and Major Gift Success

<table>
<thead>
<tr>
<th>Wave of Activity</th>
<th>Goal</th>
<th># of Gifts/Pledges</th>
<th>Current Pledge Total</th>
<th>% of Goal</th>
<th>% Parishes Over Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wave 0</td>
<td>$8,024,805</td>
<td>2,802</td>
<td>$4,777,318</td>
<td>60%</td>
<td>9%</td>
</tr>
<tr>
<td>Wave I</td>
<td>$17,463,218</td>
<td>5,746</td>
<td>$10,098,068</td>
<td>58%</td>
<td>11%</td>
</tr>
<tr>
<td>Wave II</td>
<td>$35,774,047</td>
<td>8,809</td>
<td>$24,523,480</td>
<td>69%</td>
<td>4%</td>
</tr>
<tr>
<td>Wave III</td>
<td>$10,152,726</td>
<td>6,841</td>
<td>$25,650,750</td>
<td>139%</td>
<td>86%</td>
</tr>
<tr>
<td>Wave IV</td>
<td>$29,326,560</td>
<td>9,618</td>
<td>$35,602,071</td>
<td>121%</td>
<td>87%</td>
</tr>
<tr>
<td>Wave V</td>
<td>$40,468,208</td>
<td>13,526</td>
<td>$44,343,319</td>
<td>110%</td>
<td>76%</td>
</tr>
<tr>
<td>Wave VI</td>
<td>$38,500,000</td>
<td>11,472</td>
<td>$42,402,850</td>
<td>110%</td>
<td>56%</td>
</tr>
<tr>
<td>Major Gifts</td>
<td>$100,000,000</td>
<td>77</td>
<td>$145,296,105</td>
<td>145%</td>
<td>N/A</td>
</tr>
</tbody>
</table>
A Campaign for Strong Parishes

- $150 million to ensure parishes are strong and vibrant communities of faith.
- Parishes receive 60 percent of the funds raised and collected up to their established goal.
- The Archdiocese of Chicago receives the remaining 40 percent for shared ministries across Cook and Lake counties.
- 100 percent of the funds a parish raised above goal remain with the parish — in addition to its original 60 percent share.
Campaign Case Components

$150 million for scholarships
The Catholic Education Scholarship Trust will provide scholarships — and a Catholic education — to future generations.

$30 million for critical facility issues
Many buildings have critical needs and issues beyond what parishes in distressed communities are able to address.

$10 million for catechist training
Religious education directors and coordinators, as well as youth ministers, are required to be certified in the Archdiocese of Chicago.

$8 million for academic excellence in Catholic schools
The campaign will help enhance the academic excellence of our Catholic schools, through technology grants, professional and leadership development, and school reform efforts.

$2 million for innovation in religious education
New parish-based programs and pilot approaches to religious education and faith formation are needed to effectively engage children, youth, young adults and adults in the Catholic faith.
Catholic Education Scholarship Trust

This independent Trust created with campaign gifts will provide scholarships to qualifying families for generations to come.

- Goal of $150 million.
- Pledged and cash commitments now total more than $131 million.
- $22.3 million currently invested.
- $6.453 million allocated to date.
Caritas Scholars Program

• Created in 2013 with an early gift to the campaign.

• Served as a trial scholarship program for the Catholic Education Scholarship Trust.

• Has awarded scholarships to more than 4,000 qualifying students since its inception.

• Average scholarship award is $1,500.

• For the 2016-17 school year, $4.1 million in Caritas scholarships were awarded in 103 schools.
Phoenix Scholarships

Catholic Education Scholarship Trust funds are distributed through Phoenix Scholarships.

- $412,000 in scholarships for the 2016-17 school year.

- An anticipated $900,000 in scholarships for the 2017-18 school year.

- Estimated annual income stream of $7 million once the Trust is fully funded.

- Will replace the Caritas Scholars Program, which served as a trial scholarship program.

- Contact person: Marcella Bermudez, mbermudez@archchicago.org
Criteria for Scholarship Eligibility

The primary focus of Caritas and Phoenix scholarships is serving students and families in parishes and communities with the fewest resources, and that manage their resources and operations according to standard, responsible operating policies and procedures, such as:

- Formal tuition management system (FACTS or SMART) to ensure invoiced tuition is collected.
- Exclusion policy for delinquent tuition payments that is established, communicated and consistently implemented.
- FACTS financial aid systems.
- PowerSchool student information system (SIS).
- Early determination and publication of a school’s annual tuition/fee rates.
- Regular production and evaluation of the school’s financial statements, including the income statement budget to actual, and cash flow forecast by the pastor, principal and business manager.
- Active enrollment management team.
Critical Facility Issues

$30 million of *To Teach Who Christ Is* gifts directed to critical facility issues at economically distressed parishes.

- $5.474 million allocated to date.
- Contact person: Your Director of Vicariate Operations
Critical Facility Issues

To date, funds directed to Critical Facility Issues have been used for:

- Masonry (chimney) and roof repairs at Holy Angels School.

- Roof and front entrance masonry repairs at St. Sylvester School, and sidewalk repairs at St. Sylvester Church.

- Masonry repairs at Our Lady of Tepeyac School.

- Church boiler replacement and school boiler repairs at Epiphany Parish.

- Roof replacement and mold abatement at St. William School.
Religious Education — Catechesis & Innovation

To Teach Who Christ Is benefitted religious education in two areas:

- $10 million for professional education scholarships.
- $2 million for parish religious education programs.
Religious Education — Catechesis & Innovation

Funds are already having an impact on faith formation through:

• Scholarships to youth ministers for the Youth Ministry Leadership Development Summer Institute.

• Scholarships for junior high-age youth for the Holy Fire evangelization event.

• Scholarships for high school students for a three-day formation/evangelization experience in New York City.

• Improvements to the Theology on Tap summer series for young adults.

• The creation of an online formation school, www.formedcatholiconline.com.

• $138,000 allocated to date.

• Contact person: Sandra Mena, samena@archchicago.org
Academic Excellence

*To Teach Who Christ Is* raised $8 million to enhance the Academic Excellence of our Catholic schools:

- Parish school reform program.
- Leadership and professional development for principals and teachers.
- Technology updates.
- Implementation of a diverse curriculum.
- Funding for new Regional Director positions.
- $1.8 million allocated to date.
- Contact person: Dr. Mary Kearney, mkearney@archchicago.org
Parish Portion

More than $175 million in campaign funds will be returned to parishes to address local needs. Projects include ministry enhancements, facility upgrades and repairs, such as:

- A new speaker series at St. Bernadette Parish in Elmwood Park.
- New steel doors at Our Lady of the Brook Parish in Northbrook.
- Refinished and repaired pews at St. Beatrice Parish in Schiller Park.
Parish Wave and Major Gift Fulfillment

### Parish Phase Fulfillment

<table>
<thead>
<tr>
<th>Wave</th>
<th>Total Pledged</th>
<th>Fulfilled (%)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wave 0</td>
<td>$4,777,318</td>
<td>90%</td>
</tr>
<tr>
<td>Wave I</td>
<td>$10,098,068</td>
<td>84%</td>
</tr>
<tr>
<td>Wave II</td>
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<tr>
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</tr>
<tr>
<td>Wave V</td>
<td>$44,343,319</td>
<td>23%</td>
</tr>
<tr>
<td>Wave VI</td>
<td>$42,402,850</td>
<td>20%</td>
</tr>
<tr>
<td>Total Paid</td>
<td>$96,588,733</td>
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</tr>
<tr>
<td>Balance Due</td>
<td>$149,874,644</td>
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</table>

*Fulfillment Goal of 85%

### Major Gift Fulfillment

<table>
<thead>
<tr>
<th>Gift Type</th>
<th>Pledged</th>
<th>Fulfilled (%)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pledge</td>
<td>$66,424,105</td>
<td>52%</td>
</tr>
<tr>
<td>Bequest</td>
<td>$78,872,000</td>
<td>0%</td>
</tr>
<tr>
<td>Total Paid</td>
<td>$34,693,788</td>
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</tr>
<tr>
<td>Balance Due</td>
<td>$110,602,317</td>
<td></td>
</tr>
</tbody>
</table>

*Fulfillment Goal of 95%
Potential for Fulfillment

Major Gift Fulfillment Potential
- $200 million in Major Gifts
  - $25,000+ from 1,300 donors
- Fulfillment projections
  - 90% to 100% = $180 million to $200 million

Parish Phase Fulfillment Potential
- $213 million pledged from Parish Campaigns
  - <$25,000 from 70,000 donors
- Fulfillment projections
  - 85% to 90% = $178.5 million to $189 million
Pledge Fulfillment Plan and Activation

- The archdiocese is conducting a thorough review of its fulfillment systems.
- Waves 0 and I have concluded their pledge-fulfillment period.
- A review of each wave’s progress is underway.
- Bimonthly webinars, conducted by wave, will begin next month.
Partnerships for the Future

- *To Teach Who Christ Is* is now the largest diocesan capital campaign in the history of the Church.

- Cardinal Cupich developed partnerships with parishes and individuals.

- Maintaining partnerships developed during the campaign will aid in collecting pledges.
Questions

toteachcampaign@archchicago.org