

St. John The Baptist Parish Development Commission

Date: Tuesday, March 21, 2023

Attendees:

X	Mary May (Staff Rep)	NA	Fran Davis	X	Janet Glaser
X	Vicky Wicks (chair)	NA	Gene Delaune	X	Don Grant
X	Mark Hammer	X	Bob Gabler (PLC rep)	X	Ken Ehling

*NA = not able to attend

Theme for the Year: Called Forth

PDC Goal: Give parishioners the opportunity to experience **the joy of living with a generous spirit** and bring about restoration in our parish and broader community.

PDC Purpose Statement

The purpose of the Parish Development Commission is to advise the parish on promoting a spirit of generosity in support of the mission and core values of St. John the Baptist Catholic Church, School and Cemetery.

The commission seeks to foster an authentic **joy in generosity** that will enable the parish's day-to-day operations and a broad range of initiatives including the Legacy Society, parish endowments, capital projects, and special funding needs of the church, school, and cemetery.

Agenda

- 5:30 - 5:55 Mass
- 6:00 - 6:25 Dinner
- 6:30 - 7:55 Commission time
- 8:00 - Pastoral Leadership Council

Prayer – Legacy Society prayer – [Led by Vicky](#)

Monthly Discussion Question from Jim Glaser – [Led by Vicky](#)

- How is Lent going for you this year?

Member Review 2022-2023 – [Led by Mary](#)

- In need of 1 candidate for full membership

[*Mary is reviewing the Estate Gift seminar guest list for possible members.](#)

Capital Campaign – [Led by Mary](#)

- Campaign firm interviews (Bob/Mary)
 - As announced in the March 2023 Leadership Team Report – Steier Group was selected to do a feasibility study and capital campaign to fund our church interior project and school bathroom upgrades
 - Fr. Paul will be putting together a campaign team to work with Steier
- Impact on Core Commitment campaign

[*Core Commitment and the Capital Campaign communications will be combined in the fall](#)

- Scope, Goals, Vision

Legacy Society – Led by Mary

- Review proposed revision: Add those who make an endowment gift of \$500 or \$1,000 cumulatively during their lifetime. (see page 3 of agenda)

*Don brought some suggestions for revisions

*Does a parishioner give for acknowledgement, to encourage others to give or to receive spiritual benefit?

- Additional thoughts: Consider all giving during one's lifetime as a way of creating a legacy.

*Ken suggested to have a core commitment as a prerequisite for the Legacy Society

*Parishioners can build their legacy by starting with a core commitment gift, next is an endowment gift and then an estate gift

*The Spirit of Generosity is the reason to give

*Discussed the need to improve recognition for Sunday Giving, since it is such a large portion of the parish's budget, along with recognition of time spent as a volunteer

*Decision whether to recommend adding endowment gifts to the Legacy Society set aside for further consideration.

- Formal launch ideas
- Discuss at June 50 Year Club event

Endowments - Led by Mary

- Promotions of use of endowment disbursements
 - Pyxes (ran in March 6 bulletin)
 - Water bottle refill stations (goal to run in April 1 bulletin)
- 2023 disbursement decisions by finance council

*One half of the cemetery endowment allotment was distributed

*Full allotment of the other endowment was distributed

March 2nd Estate Planning Event – Led by Vicky

- Theme: Called Forth to Prepare for Heaven
- Over fifty parishioners and friends attended
- Presenters included
 - Mary May - welcome
 - Mary Kohlhaas (Pastoral Care Coordinator) – work done through her ministry
 - Fr. Paul – the sacraments and preparing for heaven
 - Michael Cassel (Confetti Wealth) – leaving a legacy
 - Marty Schutz (attorney) – legal aspects of estate planning and Catholic health care directives
 - Mark Hammer – testimonial on Julie's life and the endowment created to honor her
- Feedback from PDC members who attended

*Recommended to have it again and market to parents of school age children. Themes could include creating a guardianship and working with your parents to make sure you know their final wishes.

Thank you, all, for your generous service and faithful dedication to St. John's!

St. John the Baptist Legacy Society Policy

St. John the Baptist Legacy Society honors those who make a gift of a bequest in their Will or Estate Plan, or a gift to a parish Endowment Fund at the level of \$500+

Will or Estate Plan gifts

To become a Legacy Society member –

- Include St. John the Baptist Parish in your will or estate plan. You may designate a specific amount or a percentage of your estate to the parish.
- Another way to become a Legacy Society member is to name the parish as the beneficiary of a life insurance policy or retirement account.
- Additional options are to establish a charitable gift annuity or charitable remainder trust, naming St. John the Baptist as beneficiary.
- Your legacy gift may be unrestricted, or you may choose to donate to one of the endowments listed below, or to a purpose that has special meaning for you.

As you consult your attorney or financial advisor on the selection of appropriate wording to reflect a bequest to St. John the Baptist, please be sure to include the full name and address of our parish, along with the Federal Tax ID number:

*St. John the Baptist Catholic Church and School, 2nd Avenue NW, New Brighton,
MN 55112*

Federal Tax ID number: 41-0732498

Endowment fund gifts

To become a Legacy Society member --

- Make a contribution(s) totaling \$500 or more to one of the five St. John the Baptist endowment funds. An endowment fund gift is held in perpetuity. The parish receives annual disbursements, based upon fund investment earnings.