The Office of Stewardship and Development serves the parishes, schools and agencies of the Archdiocese by providing education and consultation about stewardship and development best practices. The Office of Stewardship and Development coordinates the United Catholic Appeal, some development efforts for Catholic Charities, Catholic Education, archdiocesan-wide capital campaigns, and other stewardship activities.

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<tr>
<th>YOUR NEED</th>
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</table>
| CAPITAL CAMPAIGNS AND FEASIBILITY STUDIES | • Review of parish, school or agency readiness to conduct a feasibility study in preparation for a capital campaign | Cindy Riley (317) 236-1415 criley@archindy.org  
Archdiocesan procedures for building and renovation projects -- Eric Atkins (317)236-1453; eatkins@archindy.org  
ADLF Process -- Brian Burkert (317)236-1410; bburkert@archindy.org |
| CATHOLIC CHARITIES AGENCIES FUNDRAISING AND FUNDRAISING SUPPORT | • Understanding how Catholic Charities serves your local community  
• Opportunities to support the work of Catholic Charities  
• Information on upcoming appeals | Cheri Bush (317) 236-1411 c bush@archindy.org |
| CELEBRATING CATHOLIC SCHOOL VALUES — INCLUDING SCHOLARSHIP GRANTING ORGANIZATIONS (SGO) INFORMATION | • Understanding tax credit scholarships and school vouchers  
• Assistance with marketing SGOs within your school  
• Questions on the partnership with IQE, Indiana’s SGO  
• Donation questions and concerns  
• Event questions | Kim Pohovey (317) 236-1568 k pohovey@archindy.org |
| CRITERION REQUESTS AND PARISH HOUSEHOLD UPDATES | • Delivery changes including address change and temporary residence  
• Change subscription status  
• Updating parishioner membership, email or phone number | Barb Clemons (317) 592-4062 bclemens@archindy.org |
| DEVELOPMENT BEST PRACTICES | • Parish, agency and school development best practices  
• Overview of development efforts taking place in our archdiocese  
• Access to development resources | Ron Greulich (317) 236-1426 rgreulich@archindy.org  
Mike Kirk (317) 236-1546 mkirk@archindy.org |
| PARISH STEWARDSHIP RENEWAL EFForts | • Recommendation of resources to assist parish in creating a culture of stewardship  
• Initiating a Parish Stewardship Renewal Effort  
• Vendor recommendations to assist with solutions such as website creation, email/texting communications and online giving  
• Overview of best practices  
• Audit of current parish stewardship efforts and recommendations for growth | Ron Greulich (317) 236-1426 rgreulich@archindy.org  
Mike Kirk (317) 236-1546 mkirk@archindy.org  
Dana Stone (317) 236-1591 dstone@archindy.org |
| STEWARDSHIP COMMITTEES | • Recommendation of resources to assist the parish in creating a culture of stewardship  
• How to create a new committee  
• Definition of roles and responsibilities  
• Audit and recommendations for existing committee | Ron Greulich (317) 236-1426 rgreulich@archindy.org  
Mike Kirk (317) 236-1546 mkirk@archindy.org |
| UNITED CATHOLIC APPEAL (UCA) | • Resources available to parishes for promoting the United Catholic Appeal  
• Parish goals and successes  
• Timelines and parish guides  
• Consultation of best practices  
• Information on the in-pew approach | Jolinda Moore (317) 236-1462 jmoore@archindy.org  
Dana Stone (317) 236-1591 dstone@archindy.org |
## OFFICE OF STEWARDSHIP AND DEVELOPMENT

http://www.archindy.org/stewardship

United Catholic Appeal or Legacy for Our Mission  
Donor Assistance

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| **CREDIT CARD**     | • Change credit card information  
                      • Verify payment received  
                      • Stop payment                                                           | Barb Clemons, x 4062                                                           |
| **MAKE A PAYMENT OR CHANGE A GIFT** | • Make a cash or check payment  
                      • Initiate a credit card payment  
                      • Create an ACH payment  
                      • Requests to change payment amounts or cancel pledges                   | Barb Clemons, x 4062  
                                                                                     | New gifts can easily be made via ACH or credit card at www.archindy.org/UCA by selecting "Donate Now" |
| **STOCK GIFTS**     | • Initiate a stock gift  
                      • Assistance with broker instructions or questions  
                      • Providing notification of an anticipated gift and the purpose of the gift | Cindy Riley  
                                                                                     | (317) 236-1415  
                                                                                     | criley@archindy.org |
| **TAX LETTERS**     | • Request duplicate letter  
                      • Verify year-to-date amount of gifts  
                      • Language to use in parish tax letters and acknowledgements             | Barb Clemons, x 4062  
                                                                                     | Tax letters are mailed from our offices for UCA by Jan. 31 each year. |

Many resources are available to our parishes, schools and agencies on the Parish Helpdesk at [http://www.archindy.org/stewardship](http://www.archindy.org/stewardship)
The Catholic Community Foundation was established as a resource for ensuring the long-term financial health of parishes, schools and ministry agencies in the archdiocese through endowments and planned gifts. Currently, the foundation holds more than 435 endowment funds, all of which are designated for a particular parish, school or ministry area.

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<tr>
<td><strong>CATHOLIC COMMUNITY FOUNDATION</strong></td>
<td>• General information</td>
<td>Jolinda Moore (317) 236-1462 <a href="mailto:jmoore@archindy.org">jmoore@archindy.org</a></td>
</tr>
<tr>
<td><strong>QUESTIONS ABOUT CURRENT AND NEW PERMANENT PARISH, SCHOOL AND AGENCY ENDOWMENTS</strong></td>
<td>• Assistance with establishing and growing endowments • Educational support regarding CCF funds</td>
<td>Jolinda Moore (317) 236-1462 <a href="mailto:jmoore@archindy.org">jmoore@archindy.org</a></td>
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<tr>
<td><strong>ENDOWMENT ADMINISTRATION QUESTIONS</strong></td>
<td>• Fundriver (online access to fund information) • Balance • Distributions • Administrative questions</td>
<td>Melanie Johnson (317) 236-1459 <a href="mailto:mjohnson@archindy.org">mjohnson@archindy.org</a></td>
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<tr>
<td><strong>PLANNED GIVING</strong></td>
<td>• Educational support • Charitable gift annuities • Charitable trusts • Estate/trust gifts • Donor consultation • Assistance providing information to the donor and/or the donor’s advisors to ensure proper language is used and gift process is smooth.</td>
<td>Jolinda Moore (317) 236-1462 <a href="mailto:jmoore@archindy.org">jmoore@archindy.org</a></td>
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<tr>
<td><strong>PLANNED GIFT TO THE PARISH, SCHOOL OR MINISTRY</strong></td>
<td>• Stock • Real Estate • Tangible Personal Property - collections, car, etc. • Life Insurance • Explore available options</td>
<td>Jolinda Moore (317) 236-1462 <a href="mailto:jmoore@archindy.org">jmoore@archindy.org</a></td>
</tr>
<tr>
<td><strong>ESTATE PLAN THAT INCLUDES THE PARISH, SCHOOL OR MINISTRY</strong></td>
<td>• Wills • Trusts • Beneficiary Designation</td>
<td>Jolinda Moore (317) 236-1462 <a href="mailto:jmoore@archindy.org">jmoore@archindy.org</a></td>
</tr>
<tr>
<td><strong>CHARITABLE GIFT ANNUITIES</strong></td>
<td>• Establishing a Charitable Gift Annuity • Educational support</td>
<td>Jolinda Moore (317) 236-1462 <a href="mailto:jmoore@archindy.org">jmoore@archindy.org</a></td>
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