



# Roundtable Resources

PRACTICAL TOOLS FOR CATHOLIC LEADERS

## Funding the Mission: The Ministry of Inviting Support

For mission-driven leaders, the idea of “fundraising” can conjure up all manner of worries. For many, it’s what keeps them up at night as they grapple with the sustainability of their ministry or organization. Vital, yet often misunderstood, fundraising can feel like an albatross around a leader’s neck, the ultimate never-completed task, a delicate garden, which, if not tended daily, can wither in the blink of an eye. Put simply, it can feel like a chore—an obligation adjacent to ministry rather than an essential expression of it.

Yet it was renowned theologian Henri Nouwen who said, “Fundraising is, first and foremost, a form of ministry. It is a way of announcing our vision and inviting other people into our mission.” For Catholic leaders, this Roundtable Resource aims to help flip the script on fundraising—shifting how we perceive fundraising from a tactical and practical means of collecting money, to instead a spiritual act of building community through which our institutions grow stronger, more connected, and more sustainable. **Fundraising is not merely about asking for money. It is a ministry of invitation, a means of celebrating mission, and a strategy for building and renewing the ties that bind.**

### Why People Give

At its core, effective fundraising builds from the understanding that people give to that which they feel connected. While a vibrant parish auction or bingo night might bring in revenue, its true value lies in the friendships forged, traditions honored, and shared memories created, all of which drive people to take part and give throughout the year. That is because [researchers](#) have found that a sense of community can be a significant motivator to donate to a cause. When people experience belonging—when they feel they are part of something meaningful—they naturally want to support and sustain it. For some that may mean lending their time and talent, for others, it also means offering philanthropic support.

A significant body of research demonstrates this connection between giving and participation. [Data](#) from the Center for Applied Research in the Apostolate (CARA) and the United States Conference of Catholic Bishops (USCCB) show that regular Mass-goers give at far greater rates than Catholics who attend Mass less frequently. Specifically, “three-quarters of those who attended Mass weekly prior to the COVID-19 pandemic gave to their parish collection regularly, compared to half of monthly attenders, and 14% of those who attended Mass a few times a year or less often.”

The connection between giving and participation are why building community around fundraising is especially important in a Church context. But making the most of parish members’ generosity takes intentionality, focus, and planning, particularly because donors want to feel their gift—no matter the size—is used to make a difference. Making donors part of a movement, a collective effort to which they belong and are among friends, can be as rewarding as the impacts of a donation.

With that as background, the question of how to link fundraising efforts with broader community building and service activities is critical. To that end, it’s helpful to think about the following aspects of fundraising planning: leading with purpose, establishing a strong foundation of financial transparency, and creating an action plan.

## Fundraising is Ministry: Leading with Purpose

According to [research](#), people in the U.S. continue to give to religion more than any other single cause—accounting for roughly 73 percent of all charitable giving when considering faith-based nonprofits as well as the Church, its congregations, media, and ministries. But recent data from Giving USA may be the canary in a coal mine. The Giving USA report on the Economic Impact of Giving in 2024 showed broad increases in philanthropic giving in both real and inflation-adjusted terms. But, hidden among the general good news was a worrisome statistic: **of the nine categories of giving tracked, just one—religion—showed an inflation-adjusted decrease in giving in 2024**. If that is true in a year that saw near-historic increases in overall giving, parishes and Church institutions face unique fundraising challenges in the future, and they should prepare now if they want to buck the trend.

### 2024 CHARITABLE GIVING TO RECIPIENTS

Type of recipient organization	Up/down	Amount	Adjusted for Inflation
Religion	↑ 1.9%	\$ 146.54 billion	↓ 1.0%
Human Services	↑ 5.0%	\$ 91.15 billion	↑ 2.0%
Education	↑ 13.2%	\$ 88.32 billion	↑ 9.9%
To Foundations	↑ 3.5%	\$ 71.92 billion	=+ 0.5%*
Public-Society Benefit	↑ 19.5%	\$ 66.84 billion	↑ 16.1%
Health	↑ 5.0%	\$ 60.51 billion	↑ 2.0%
International affairs	↑ 17.7%	\$ 35.54 billion	↑ 14.3%
Arts, culture, and humanities	↑ 9.5%	\$ 25.13 billion	↑ 6.4%
Environment and animals	↑ 7.7%	\$ 21.57 billion	↑ 4.6%

SOURCE: GIVING USA THE ANNUAL REPORT  
\*Change of less than + or - 1% is considered flat

To that end, given the connection between engagement in a parish community and giving patterns, Catholic institutions should plan for, and link, fundraising efforts to the work they do to build and serve the community more broadly. To that end, leading with purpose, showing a clear institutional **why**, is essential to successful fundraising campaigns.

Nouwen defines fundraising as “a way of announcing our vision and inviting other people into our mission.” In that spirit, the most successful fundraising efforts don’t begin with the **what**—the event or the campaign—

they begin with the **why**. Whether hosting a capital campaign or drafting a grant proposal, the most effective fundraising is rooted in a clearly articulated mission. Why does your school, parish, or nonprofit exist? What is your purpose, and why is that purpose important to the people and the communities you serve?

The art of leading with your **why** is grounded in two things:

1. Having a **clear and compelling** mission, vision, and purpose.
2. Ensuring that you communicate, in a clear, pithy, and compelling way, how fundraising activities—from online campaigns to weekly collections—are tied to that **why**.

One powerful illustration of this point comes from a nonprofit organization that at the time was called “America’s Second Harvest”—a name that had little resonance with donors and that didn’t communicate the organization’s purpose. In 2008, as part of an overall rebranding, the organization changed its name to “Feeding America,” to more directly communicate its *why*. The results were dramatic: Individual donations increased by 46 percent in the first year, despite the Great Recession. Between 2008 and 2010, fundraising revenue increased by 74 percent.

**Not every organization needs rebranding to clarify and communicate their why, but it’s important to note that branding a campaign effectively can go a long way.** For instance, Catholic Charities USA’s (CCUSA) recent “We Are There” campaign is a powerful example of how a 100+ year-old Catholic institution was able to communicate its purpose clearly and simply, in a time of great uncertainty, without rebranding. “We Are There” tells the audience in pithy, clear language that the purpose of Catholic Charities is to be in communities across the U.S. helping vulnerable neighbors, serving in the wake of some of our nation’s worst disasters, feeding those who are hungry, providing shelter, and offering many other life-giving services. And it worked. CCUSA saw a pronounced bump in favorability and awareness of the work of Catholic Charities with targeted audiences across the nation thanks to the campaign.

St. Mary’s Parish in Grand Rapids, Michigan, provides another example of leading with purpose. Their mission statement states:

*“This is our call and our blessing:*

- *To proclaim and teach the Good News.*
- *To worship in joy and gratitude.*
- *To welcome the stranger and the outcast.*
- *To serve the needs of the people, body, and spirit.*
- *To labor for social justice so that all may have what they need.”*

Here again, the **why** is clear and resonant. In each of these examples, three things are true:

1. The purpose is communicated in a **short and memorable way**.
2. Each example is **action-oriented**—what the institution *does* is tied to its *purpose*, either explicitly or implicitly.
3. Each example is rooted in a purpose centered on **service, outreach, or community**.

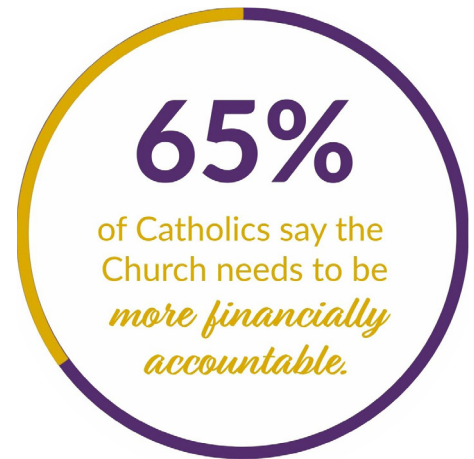
These examples help frame how, when approaching fundraising as ministry, we think not just about the dollars we need to collect, but about how we can frame our campaigns, appeals, and stewardship around the mission and moral vision of the Church. If the impact of a donor’s gift is invisible, if the mission and how the funds will be used are muddy, donor connection will be tenuous. However, if the impact is explicit and aligned with values donors cherish, generosity naturally follows.

# Fundraising Requires Trust & Financial Transparency

When thinking about and planning for fundraising, it's easy to think about the work involved in planning for and making the ask. But the effectiveness of the ask is built on a strong foundation of financial transparency, a clear understanding of institutional needs, and lean and thorough budget planning.

More specifically, effective fundraising is built through trust, which is built through financial transparency and effective, mission-driven communication.

Data from the last 20 years consistently shows that Catholics align giving with their trust in the Church and its leadership. A 2002 survey by FADICA (Foundations and Donors Interested in Catholic Activities) and the Villanova Center for Church Management found giving rates within the Catholic Church varied in proportion to transparency and accountability, with 65 percent of respondents saying the Church needed to be more financially accountable and 1 in 4 saying they'd withhold from giving if their money was used to pay for abuse lawsuits. Another study, which we shared at our 2004 Church in America convening, found 40 percent of the laity believed lay people should withhold donations until the laity had greater say in financial decision-making.



More recent studies show Catholics give in proportion to transparency and accountability. A 2015 study of the areas in the U.S. where a priest was credibly accused of abuse saw a drop in both affiliation with the Church and giving to it in each zip code. So much so that the study authors estimate the Church lost more in potential donations and tithes from the abuse crisis in the last few decades than it paid in actual settlement payouts.

In short, the research into Catholic giving indicates a clear level of reticence on the part of donors to give unless they feel confident that the institution to which they give will be a good steward of their resources.

Adding complexity, financial transparency is not mandatory for religious organizations in the same way it is for other U.S. nonprofits. Churches are exempt from federal IRS financial disclosure requirements, and religious organizations are granted tax-exempt status without being required to submit 990s or to publicly disclose other financial information. In addition, churches are granted tax-exempt status automatically, without needing to apply to the IRS for recognition.

**While these exemptions are important because they ensure churches can operate free from excessive government oversight, diocesan and parish leadership looking to boost fundraising would be wise to adopt either the traditional standards for financial disclosure or other ways to communicate financial transparency, even though not required.**

Data from the past 20 years supports this recommendation. One survey of 2,200 Catholics found that:

- parishioners who felt informed about parish finances contributed 32 percent more
- those who felt laypeople had enough influence in parish finances contributed 26 percent more
- those who felt the parish leadership was financially accountable contributed 15 percent more
- those who agreed that the parish leadership discussed important parish decisions contributed 16 percent more.

In short, donors must believe their money will be stewarded well and in alignment with Church teachings. Catholic leaders must take this seriously. Transparent budgets, clearly communicated financial priorities, and visible impact help build the trust that generosity requires.

## Creating an Action Plan

Leading with purpose, building community, and building a firm foundation of transparency and trust are the essential building blocks of effective fundraising. But these alone are insufficient to drive sustained giving over time. Once the foundation is established, building a fundraising plan that matches both institutional needs and community context is important.



### BUILDING A FUNDRAISING PLAN INVOLVES FIVE STEPS:

1. **Set** a budget to understand institutional needs.
2. **Analyze** historical giving patterns and chart a “roadmap” of asks.
3. **Prepare** for the long-haul: Set realistic short- and long-term fundraising goals.
4. **Plan** for action: Identify and plan fundraising campaigns and activities.
5. **Implement**, track data, assess, and adjust.

### *Step 1: Set a budget to understand institutional needs*

The first step to building a short- and long-term fundraising plan is to set a budget—one that is realistic and tied to core institutional priorities. Importantly, when setting a budget, it’s critical not to assume unrealistic fundraising expectations. In general, institutions can expect annual fundraising to increase by 3 to 10 percent annually, with the smaller amounts more realistic for smaller, more mature, or once-struggling institutions and the larger estimates more likely for newer, growing nonprofits. That means, **when setting a budget, projected increases in expenses should not outpace realistic revenue projections. And, more likely, expense increases should follow increases in giving, not precede them.**

Equally important, when setting a budget, leaders should evaluate past fundraising progress and adjust budget expectations accordingly. That is to say, if the institution has struggled to meet fundraising targets over the past three-to-five years, budget projections should reflect reduced fundraising expectations.

### *Step 2: Analyze historical giving patterns and chart a “roadmap” of asks*

One common mistake is to set an overly ambitious budget, then try to plan fundraising to match the budget. This can lead institutions to set unrealistic fundraising targets and to wind up with unanticipated financial constraints that force real-time budget cuts. That’s why setting a realistic budget that assumes only **incremental** fundraising increases, as explained above, is essential.



To avoid this pitfall, institutions should keep careful records of all historic fundraising activity. That is to say, when it comes to effective fundraising, keep track of everything. Specifically, it's important to:

- ☐ **Maintain** a database of all donors who have given, how much they have given in total, and how much they've given relative to how much they were asked to give, when they gave, and whether their support has increased, decreased, or remained stable over time.
- ☐ **Track** historic foundation gifts, with clear notes on whether those gifts were one-time donations to time-bound projects or ongoing support for institutional sustainability.
- ☐ **Keep** careful records and notes from donor conversations and foundation engagements to help paint a picture of how closely core supporters have been engaged, and whether their connection to the institution is waning, strengthening, or remaining stable.

This data collection provides the information leaders need to build a fundraising roadmap. A roadmap is simply a list of all "asks" that will be made over the course of the year. The roadmap should include five things:

1. **The Donor and/or Foundation Name and Most Recent Gift:** New asks should not dramatically outpace historically giving patterns, so understanding whether and how much each donor has given in the past is critical.
2. **A Basic Ask, a Stretch Ask, and a Yield:** A "basic" ask is the minimum amount you plan to ask for in the year ahead and the stretch goal is the amount you might ask if the donor seems especially engaged and open to an increased gift. For instance, if a donor has historically given \$1,500 a year, the basic ask might be \$1,500 and the "stretch" ask might be \$2,000. Or, if the donor has given \$10,000 a year, the basic might be \$10,000 and the stretch might be \$15,000 or \$20,000, depending on their overall capacity. When setting basic and stretch asks, it's important to consider what the donor has typically given, what their capacity is (so that you don't over-ask), and how engaged they are in the work you are doing right now. That's because low engagement typically yields lower giving, and high engagement gives you confidence in making a "stretch" ask. The "yield" is the amount you expect to get. Yield rates vary depending on how loyal or how new a donor is, how engaged they are, and what their past giving patterns have been. As a general rule, yield rates for new donors can be around 50 percent, whereas yield rates for loyal and committed donors can be as high as 80 to 90 percent. Critically, when assessing whether you are on track to hit your fundraising goal, you should be tracking actual gifts and projected yield rates, not asks. Because it is rare that you get a "yes" to every ask made.
3. **A "New Donor" Goal:** Of course, one goal of fundraising is to draw in new supporters. These are donors who will not be in your roadmap, but you want to make sure you plan to spend some time identifying and cultivating them as new prospects. To that end, it can be helpful to set an overall "new donor" goal. As always, it's important to be realistic. The goal is to cultivate new donors for the long haul, which means building long-term relationships. Better to start small and build over time than to over-estimate early and lose the chance to build long-term relationships with new supporters.
4. **A "Campaign" or "Collections" Goal:** Particularly for Catholic parishes and institutions, campaigns and/or weekly offertory are critical pieces of overall fundraising. But it's unlikely that you would create an individual ask for every member of the parish. Instead, you want to build into your planning an overall campaign or offertory goal that reflects historical patterns and current trends.
5. **A Real-Time Tracker:** Finally, it's critical to track fundraising efforts early and often. One benefit of setting projected "yield" rates for each ask, and individual goals for offertory, campaign planning, and new donors, is you can track, in real time, where you are beating the odds, where you might be falling short, and where you're on track. And knowing that information in real time—so you can make adjustments as needed to future asks, to expenses, or to other planning—is critical.

### *Step 3: Prepare for the long-haul: set realistic short- and long-term goals*

Once you have a clear sense of annual budget needs and a roadmap that is grounded in historical giving patterns and trends, you can solidify short- and long-term fundraising goals.

While some organizations have experienced massive increases—and decreases—in fundraising in a given year, in general, most organizations experience only about 3-5 percent annual growth. As much as we hope to be the next Feeding America or launch the next viral sensation like the Ice Bucket Challenge, **it's best to plan realistically and assume that giving won't increase by more than about 3-5 percent in a year.** Additionally, it can be helpful to try to balance immediate asks with long-term pledges as you plan, because longer term commitments help make fundraising (and budget planning) more predictable.

### *Step 4: Plan for action: identify and plan fundraising campaigns and activities*

The first three steps of effective fundraising are all about understanding your institutional context—what are your needs, who are your donors, how much can you reasonably raise.

Once you have a firm understanding of that context, it's time to take that knowledge and turn it into an action plan. And it's essential that your action plan is something that you and your team can accomplish in a year. For instance, if you are a small team with a single volunteer fundraiser, you need to ensure your action plan is feasible for a volunteer who likely has other demands on their time. And that involves thinking through how you will balance each of four different fundraising activities.

#### **Four Types of Fundraising Activities**

- 1. Event-Based Fundraising:** These are the community-centered activities that bring people together for a shared purpose. Think annual galas, parish festivals, 5K races, or school auctions. Events often require significant planning and upfront investment, but can yield high returns—both financial and relational. They are ideal for cultivating a culture of giving, creating community, showcasing mission impact, and building long-term engagement.
- 2. Campaigns and Appeals:** Campaigns involve a specific, time-bound request for funding, often tied to a clear cause or occasion. Examples include Giving Tuesday pushes, capital campaigns, or annual offertory drives. Appeals can be broad-based or targeted, but work best when they are personal, mission-aligned, and built on existing trust and communication.
- 3. Individual Donor Cultivation:** This type of fundraising centers on building and maintaining personal relationships with major donors. It is time-intensive, but can yield transformational gifts. The work involves one-on-one engagement, personalized stewardship, and regular updates—often over the course of many years. Success depends on trust, clarity of mission, and strong internal data tracking.
- 4. Grant Writing and Foundation Cultivation:** Foundations and grant-making institutions can be important partners in funding specific programs or long-term initiatives. This work requires research, strategic relationship-building, and ongoing reporting. Grants are often best pursued for clearly defined needs, especially those that align with a funder's issue-based focus (e.g., education, food insecurity, or healthcare).



Where you devote most of your time in your action plan depends both on the team you have and the context within which you work. For instance, if you have a smaller team, planning a large event might not be feasible, but cultivating donors and hosting a campaign could be manageable and return strong results. Equally important, where you spend your time depends on what activities most help you build and engage your community and connect individuals to your mission, to your institution, and to the projects you need to fund.

For parishes, for instance, event-based fundraisers can be enormously important to community building. Even if the yield from an individual event is relatively low, given that engagement in the community is tied directly to long-term giving rates, these events might still be an important piece of your action plan. Events are also a great way to cultivate volunteers, who believe in and support the mission. Volunteers can often become a source of new donors.

Similarly, if you are an institution that is supported by a small number of high-capacity donors, then your action plan needs to set aside significant time for individual donor cultivation and maintain a dynamic and accurate database of giving and all touchpoints with past and prospective donors.

As you build an action plan, it's equally important that you match fundraising activities to goals. A gala dinner, for example, is an event-based activity—but you can approach it as a way to identify new donors and draw them into your network, which would likely involve inviting core supporters and asking them to bring interested friends, or you could approach it as a broad, community event by opening it to the public and promoting broadly with general outreach. Strategic alignment between your goals and your fundraising activities ensures you don't waste time or energy. However, not every strategy is a match for a particular action. For example: relying on a broadcast campaign to reach donors through a heavily-saturated giving event like Giving Tuesday will be a challenge, unless your mission is easy to explain and widely resonant. Similarly, sending a major donor appeal through mass email will fall flat for most people. Rather, personalize your message for each and every donor and follow up individually. Lastly, it can seem like a missed opportunity to not apply for a major grant that just got announced, but without a clearly defined project that has measurable outcomes, launching a time-consuming grant-writing initiative may not be the best use of time and lead to expending more resources than securing revenue. **When your strategy matches your context, your fundraising becomes not just more effective—but more mission-centered, more sustainable, and more reflective of your institution's values.**

### *Step 5: Implement, track data, assess, and adjust*

The final step of any successful fundraising plan is the implementation phase—this is where the rubber meets the road and where the actual work of raising money and building community happens. During the implementation phase, it's important to remember President Eisenhower's wisdom that "plans are useless, but **planning is indispensable.**"

His point, of course, is not that the time spent planning is wasted. Rather, that slavish adherence to a pre-crafted plan without openness to make adjustments based on how the plan is actually playing out on the ground is foolish. That's why, during the implementation phase, it's critical to have a clear-eyed sense of what data and feedback you will use to measure progress, how you will track that data in real time, and at what point you might be willing to make adjustments based on your experience on the ground.



A process of data-tracking, assessment, and adjustments is not meant to take a plan completely off course. But it should allow you to act nimbly and make changes when it's clear shifts are needed to meet goals.

## Conclusion

While the ingredients for creating a successful and sustainable fundraising strategy can seem varied and complex, fundraising doesn't have to be a mystery or a chore. There are proven steps you can follow to guide you through this work, and nothing is more rewarding than when those actions result in new gifts. As outlined here, there are essentially four types of fundraising activities and four overarching strategies. Each plays a role in a healthy development plan, and the most effective leaders match the right strategy and the right activities to the right moment, goal, and audience. We hope this guide has helped illuminate how viewing fundraising as a ministry and aligning it with your parish or organization's "why," are the keys to all the other pieces fitting into place.



# LEADERSHIP ROUNDTABLE

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