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**The Catholic Appeal**

***“We the Many, Serving as One”***

In our Archdiocese of Boston, there are more than 50 ministries that enrich parish life, inspire and educate future generations, strengthen families, and advance Church leadership. These ministries provide vital programs and services to our parishes, Catholic elementary and secondary schools, and the larger Catholic community. These ministries are made possible through a shared commitment to the Catholic Appeal. The Catholic Appeal is funded through the generosity and commitment of those who believe in these ministries and want to ensure they remain strong.

The Catholic Appeal provides a teachable moment. It allows parish leaders the opportunity to talk about the connectedness of our Church. Every time that we say the Creed, we reaffirm the fact that we are members of one “Holy Catholic Church”. However, often people don’t reflect upon the meaning of these words. The Appeal provides an opportunity to reflect upon the fact that every Catholic is part of our local Church and part of the Universal Church. Each of us is responsible not only for his or her parish, but also for the wellbeing of the Church throughout our Archdiocese and throughout the world.

Once a year, Catholics throughout the Archdiocese are asked to support central ministries by giving a gift to the Catholic Appeal. Just as the weekly collection supports parish expenses, initiatives and programs, the Catholic Appeal helps fund services that are essential to both the parish and greater Church community. Through a shared commitment to the Catholic Appeal, we unite our hearts and hands with one another as the body of Christ in the Archdiocese of Boston.

Supporting the Catholic Appeal is the most effective way to carry out the work of the Church both within and beyond parish boundaries. Each parish’s support of the Appeal is not only crucial to continuing these ministries, but it is a testament to how we live our Catholic faith together. By working together and supporting each other, we truly can do great things for our Church.

***Thank you for your commitment and dedication to the Archdiocese of Boston and the Catholic Appeal.***

## Our Catholic Mission at Work in Your Parish

### Ministries Supported by the Catholic Appeal

## Enriching Parish Life

### Supporting our Priests and Deacons

- Clergy Personnel
- Clergy Support and Ongoing Formation
- Permanent Diaconate
- Diaconal Life and Formation

### Serving the Parish Community

- Pastoral Planning
- Lifelong Faith Formation and Parish Support
- Divine Worship
  - Rite of Christian Initiation of Adults (RCIA)
- Outreach and Cultural Diversity
  - Airport Chaplain
  - Black Catholic Ministries
  - Deaf Apostolate
  - Hispanic Apostolate
  - Ministry of Persons with Disabilities

### Strengthening Parish Operations

- Parish Support and Training
- Parish Services
- Property Management
- Human Resources
- Information Technology
- Risk Management and Insurance
- Finance and Accounting

## Educating Future Generations

### Teaching the Faith to the Next Generation

- Catholic Schools
- Faith Formation of Children
- Faith Formation of Youth and Young Adults
  - Catholic High School Ministry
  - Catholic Youth Organization (CYO)
    - Athletic Ministry
  - Middle School/High School Parish
    - Youth Ministry
  - Scouting Ministry
  - Young Adult Ministry
- College Campus Ministry
- Archives

### Inspiring New Vocations

- Vocations Office

## Strengthening Families

### Building Stronger Marriages

- Marriage Ministry
  - Transformed in Love Marriage Preparation Program
- Natural Family Planning (NFP)

### Renewing the Adult Faith Journey

- Small Group Discipleship

### Healing Families in Times of Difficulty

- Chaplaincy Programs
  - Bereavement Ministry
  - Healthcare Ministry
  - Prison Ministry
  - Pastoral Outreach to the Sick and Homebound
- Health and Social Services Ministry
  - Addiction Recovery Pastoral Support Services
- Pro-Life Ministry
  - Pregnancy Help
  - Project Rachel
- Tribunal

### Preserving Catholic Family Values

- Family and Intergenerational Ministry
- Massachusetts Catholic Conference (MCC)

### Promoting a Culture of Life

- Respect Life Education
- Palliative Care

## Advancing Church Leadership

### Supporting the Cardinal and Vicar General

- Cardinal's Office
- Vicar General and Moderator of the Curia
- Chancellor's Office
- Regional Bishops' Offices
- Delegate for Religious
  - Vocations to the Consecrated Life
- Canonical Affairs
- General Counsel
- Communications and Public Affairs
- Institutional Advancement
- Finance
- Ecumenical and Interreligious Affairs
- Professional Responsibility and Oversight
- Episcopal Vicar for the New Evangelization
- Support to the Holy See and Other Affiliates

## Catholic Appeal Leadership Committee

*The Catholic Appeal is led by a dedicated group of clergy and lay persons who provide advice and support throughout the year. We are very grateful to the members of the 2018 leadership committee.*

<b>Maria Blewitt</b>	St. Athanasius Parish, Reading
<b>Rev. John Capuci</b>	St. Malachy Parish, Burlington
<b>Very Rev. Walter Carreiro</b>	St. Anthony of Padua/St. Francis of Assisi, Cambridge
<b>Chris Kierce (Co-Chair)</b>	St. Anthony Parish, Cohasset
<b>Kevin Matthews</b>	Our Lady of Fatima Parish, Sudbury
<b>Rev. Louis Palmieri (Co-Chair)</b>	Sacred Heart/St. Ann/St. Mary, Quincy
<b>Bill and Anne Sullivan</b>	St. Robert Bellarmine Parish, Andover
<b>Jim and Eileen Tempero</b>	St. Mary of the Assumption Parish, Brookline

Honorary Committee Members:

<b>Rev. Rodney Copp</b>	St. Gerard Majella Parish, Canton
<b>Rev. Msgr. William Helmick</b>	St. Theresa of Avila Parish, West Roxbury
<b>Rev. Msgr. Francis Strahan</b>	St. Bridget Parish, Framingham



## THE SUCCESSFUL PARISH CAMPAIGN

### Advance Phase

*January - February 2018*

#### January 2018

- **Select a Volunteer Parish Appeal Coordinator**

Appeal Coordinators must be lay volunteers and their involvement will encourage the generous support of others. The most effective coordinators lead their parish's Appeal efforts in any or all of the following ways:

- If the Pastor requests, providing a brief witness talk explaining why he/ she supports the Appeal and encouraging fellow parishioners to participate.
  - Attending Archdiocesan trainings / webinars.
  - Providing feedback that will help strengthen the Catholic Appeal in the future.
  - Giving to the Appeal, preferably prior to the launch of the parish campaign.
  - Reaching out to donors and thanking them for their support.
- **17<sup>th</sup> Catholic Appeal Website is launched.** On-line donations can be made for parish credit. All parish materials are available on the Resources tab (bulletin announcements, prayers of the faithful, sample witness talks, parish reporting).
  - **29<sup>th</sup> Letter from Cardinal Sean mailed to prior donors:** Parishioners who gave to the 2017 and / or 2016 Catholic Appeal will receive a letter from Cardinal Sean, asking for their early support of the 2018 Catholic Appeal.

#### February 2018

- **Weekend of February 3-4: Display 2018 Posters prominently throughout your Parish**
- **Weekend of February 10-11: Add Bulletin and Mass Announcements** each week asking parishioners to respond to Cardinal Seán's 1st request letter.
- **Parish Launch Materials mailed February 20:** Each parish will receive materials to successfully launch their Catholic Appeal.
  - In pew Envelopes, DVD and / or Audio CD
  - Parish Goals: in pew, assessment and financial goal sheet
  - Gift Processing bank bags, return envelopes and labels

- **Week of February 19: Send Email Solicitation with Link to the Catholic Appeal Video**  
Pastors will be asked to forward a “ready to send” email to parish leaders, staff, volunteers, parishioners, and religious education families with a link to a short Catholic Appeal video. Parishes are also asked to include the video on their website and social media platforms.

### **Announcement Weekend**

*March 3 & 4*

The focus of Announcement Weekend is to provide information about impact / benefits of the Catholic Appeal and to advise parishioners that they will be asked to make a pledge next week on Commitment Weekend March 10-11, during the in-pew process.

- **Include the Catholic Appeal Insert in Your Bulletin** If your parish uses LPI, Pilot or JS Paluch, the Catholic Appeal insert will be placed in your bulletin automatically (unless you have notified your bulletin company otherwise). All other parishes should manually insert the bulletin announcement the Weekend of March 3 & 4.
- **Witness Talk** Parishes are asked to provide a brief witness talk about the Catholic Appeal prior to the close of Mass. This can be given by the pastor, Appeal Coordinator, or other volunteer from the parish. Sample Witness talk and helpful hints can be found on the Parish Resources tab of the Catholic Appeal website.

### **Commitment Weekend**

*March 10 & 11*

- **Conduct the In-Pew Request at All Masses**

The ability to reach goal by June 30, 2018 and increase donor participation relies heavily on your efforts on Commitment Weekend, in particular, the in-pew presentation. We have provided two versions of the in-pew script. Please note that Option A has proven to be most effective (see page 11-13 for sample scripts )

#### **Helpful tips for a successful Commitment Weekend:**

- ❖ **Supply the Church with plenty of in-pew pledge forms and pencils ahead of Commitment Weekend.** Do not place in-pew pledge forms in the pews before Mass; they are to be handed out during Mass to the best of your ability.
- ❖ **Recruit and train help for Commitment Weekend. Ushers may need some extra help to distribute and collect in-pew pledge forms.** Religious education students, members of the Parish Council or Finance Council, or other volunteers will be helpful. (A good service project for Confirmation students).
- ❖ **Test all audio / visual equipment well ahead of time to prevent delays or malfunctions.**
- ❖ **Invite parishioners to support the Appeal by completing and returning their pledge forms during Mass.** In cases where scheduling prevents the pastor from being present at every

Mass, the celebrant, Appeal Coordinator(s), or other volunteers may lead the in-pew presentation.

- ❖ **Collect completed in-pew pledge forms during Mass.** Have ushers collect completed forms during Mass and take to a secure place for safekeeping. Do not ask them to take the pledge form home; this greatly reduces parishioner response.
- ❖ **Be available and prepared for parishioners to ask questions.** It is recommended that pastors, celebrants, and volunteers remain after Mass to answer questions about the Appeal.
- ❖ **Ensure safekeeping and processing of in-pew envelopes. DO NOT OPEN ENVELOPES.** Advise counters to send them directly for processing using bank bags and FEDEX labels. See Gift Processing section on page 16 for proper handling.

### Closeout Phase

*March 17/18 through June 30, 2018*

- **Remind Parishioners they can still give to the Catholic Appeal**

Beginning the weekend of March 17/18, parishes should notify parishioners during Mass that if they have not yet made their pledge they may do so online or by completing an in-pew pledge form available at the back of the Church.

- **Stewardship: Remember to Thank Your Donors!**

Although Catholic Appeal donors are thanked promptly by Cardinal Seán, we recommend that your parish also sends a thank you letter from the pastor and/or Appeal Coordinator(s). Thanking donors is one of the most important elements of your parish Catholic Appeal and will positively impact your parish's current and future campaigns. Furthermore, thanking donors is another way to strengthen your relationship with families and individuals in your parish.

- **Provide weekly updates regarding your Parish Appeal**

Share the great news of Appeal success with parishioners. Use bulletin and Mass announcements to update the congregation on the progress of the Appeal. Invite the Appeal Coordinator or other lay witness to provide brief updates and to ask for support.

- **Celebrate Parish successes**

Congratulate your parishioners for a successful campaign. Reaching parish goal, increasing parishioner participation, receiving a rebate check are all messages that should be shared from the altar or through bulletin announcements. Let your parishioners know, "Because of you, we can accomplish great things".

## Catholic Appeal Changes in 2018

- **Conditions have been added to the rebate and abatement structure.** In order to qualify for an abatement or Catholic Appeal rebate, parishes must participate or conduct the in-pew process, meet their in-pew response goal, **AND** have a Catholic Appeal Coordinator.
- **The in-pew process has been simplified.** Parishioners who already gave through direct mail or on-line, can still participate by filling in their name, parish and checking the box:
  - I have already given to the Catholic Appeal this year
- **Rental income is removed from the base revenue for Tithe and Catholic Appeal Assessment Calculation.** Feedback from parishes with rental income is that it is not donor driven like other components of base revenue, unjustly inflating their Catholic Appeal Assessment. Approximately 95 Parishes will see an impact from this change in policy.
- **A Rebate “Pool” will be created for those parishes that meet the conditions noted above and exceed their Catholic Appeal Assessment.** Parishes should anticipate a rebate of 40 - 60%.
- Parish rebates will be issued twice a year (October 2018 and February 2019) and will no longer be issued by check. All rebates will be automatically deposited into the parish bank account.
- **Catholic Appeal Reporting:** Donor and LYBUNT reporting will be saved to the website on Friday afternoons. Email notifications will be sent by end of day each Friday.
- **Bulletin Inserts: J.S. Paluch** is being added to the list of Bulletin Companies that will automatically insert the Catholic Appeal Bulletins on Announcement Weekend, March 3 & 4.

## Roles and Responsibilities

	<b>Pastor</b> <i>Leader of the Parish Appeal campaign</i>	<b>Appeal Coordinators</b> <i>Volunteers who lead with the pastor</i>	<b>Administrative Staff</b> <i>Assist with the Appeal throughout the campaign</i>	<b>Business/F&amp;O Manager</b> <i>Inform Pastor, Appeal Coordinator and staff on progress of the Appeal</i>
<b>Advance Phase</b>	<ul style="list-style-type: none"> <li>▪ Select Appeal Coordinator(s)</li> <li>▪ Attend a regional training session</li> <li>▪ Send email solicitation with video link to parishioners and religious education families</li> </ul>	<ul style="list-style-type: none"> <li>▪ Attend a regional training session</li> <li>▪ Ensure posters are hung, Appeal Messages are in bulletin, supplies are received.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Attend a regional training session</li> <li>▪ Ensure all announcements are included in the parish bulletin</li> <li>▪ Verify parish has received adequate supply of Appeal materials</li> <li>▪ Post Appeal video to website and other social media platforms</li> </ul>	<ul style="list-style-type: none"> <li>▪ Attend a regional training session</li> <li>▪ Ensure pastor, Appeal Coordinator(s), and administrative staff understand parish assessment and goal</li> </ul>
<b>Announcement Weekend</b>	<ul style="list-style-type: none"> <li>▪ Provide brief witness talk about the Appeal*</li> <li>▪ Include Appeal insert in bulletin</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provide brief witness talk about the Appeal at all Masses</li> </ul>	<ul style="list-style-type: none"> <li>▪ Coordinate bulletin inserts (if not automatically inserted by Pilot/LPI/JS Palluch bulletin company)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provide financial and donor update on Advance Phase results to pastor and Appeal Coordinator(s)</li> </ul>
<b>Commitment Weekend</b>	<ul style="list-style-type: none"> <li>▪ Lead in-pew presentation immediately following Cardinal's audio message*</li> </ul>	<ul style="list-style-type: none"> <li>▪ Ensure in-pew request is made at all Masses and that forms are collected during Mass</li> <li>▪ If requested by pastor, conduct in-pew presentation</li> </ul>	<ul style="list-style-type: none"> <li>▪ Confirm sufficient supply of in-pew pledge forms</li> <li>▪ If needed, assist with in-pew presentation</li> <li>▪ If needed, recruit help on Commitment Weekend</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provide financial and donor update on Advance Phase results to pastor and Appeal Coordinator(s)</li> </ul>
<b>Post-Commitment Weekend</b>	<ul style="list-style-type: none"> <li>▪ Provide brief remarks about the Appeal and refer to in-pew pledge forms at back of church*</li> </ul>	<ul style="list-style-type: none"> <li>▪ If requested by pastor, provide brief remarks about the Appeal and refer to in-pew pledge forms at back of church</li> </ul>	<ul style="list-style-type: none"> <li>▪ Confirm sufficient supply of in-pew pledge forms at rear of church</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provide regular weekly updates on progress of Appeal campaign to pastor and Appeal Coordinator(s)</li> </ul>
<b>Mid-Appeal</b>	<ul style="list-style-type: none"> <li>▪ Provide brief remarks about the Appeal refer to in-pew pledge forms at back of church*</li> </ul>	<ul style="list-style-type: none"> <li>▪ If requested by pastor, provide brief remarks about the Appeal and refer to in-pew pledge forms at back of church</li> <li>▪ Participate in June Thank-a-thon</li> </ul>	<ul style="list-style-type: none"> <li>▪ If needed, confirm sufficient supply of in-pew pledge forms for in-pew presentation</li> </ul>	
<b>Ongoing</b>	<ul style="list-style-type: none"> <li>▪ Update parishioners on progress of campaign</li> <li>▪ Thank donors through letters and personal outreach</li> </ul>	<ul style="list-style-type: none"> <li>▪ Assist pastor with donor thank you letters and personal outreach</li> <li>▪ Provide Pastor with updates on Parish results</li> </ul>	<ul style="list-style-type: none"> <li>▪ Collect and mail pledge forms on a weekly basis</li> <li>▪ Update Catholic Appeal Office on changes to parish mailing list (deaths, moves, etc...)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Assist in improving parish rebate by regularly informing pastor on status of rebate and paid pledges</li> </ul>

*\*Duties also can be performed by Appeal Coordinator or other volunteer*

## Announcement Weekend March 3-4

### Witness Talk

There isn't one formula for an impactful speech, but it is important that your talk be personal and warm, and that you sincerely ask your fellow parishioners for their help in supporting the ministries funded by the Catholic Appeal. Your main role will be to "bring to life" the Catholic Appeal message of "We the many, Serving as one".

For more information or sample witness talks, please visit the Parish Resources tab of the Catholic Appeal website.

#### **Personalize your witness talk by:**

- Introducing yourself: Add wife's name, years as a parishioner, role in the parish  
"I am \_\_\_ and I am a fellow parishioner at \_\_\_ Parish. I / my family and I have been members here since \_\_\_ and we participate in \_\_\_\_.
- Mentioning your Parish name, Pastor, 2017 Catholic Appeal Results and # donors  
"Father / Monsignor \_\_\_ asked me to speak today about the Catholic Appeal...
- Detailing specific ministries that your parish benefits from  
"One of the ministries funded by the Catholic Appeal is \_\_\_\_\_. This ministry provides \_\_\_ to in our parish.

#### **Ask each family to support the Catholic Appeal:**

- State why you and your family give to the Catholic Appeal
- Encourage new donors:  
"If you have never given, please consider joining me and #\_\_ of our parish families who support the larger Church with gifts to the Catholic Appeal.
- Challenge the parish to increase their participation rate:  
"Our Parish is being challenged to increase our parishioner participation rate this year to ###. Any gift, great or small, is participation in this important appeal"
- Ask them to prayerfully consider participating on Commitment Weekend, March 10-11.

#### **Conclude:**

- Thank the pastor for allowing you to speak on behalf of the Catholic Appeal.
- Thank the parish for their past support
- Thank parishioners for considering a donation this year.
- Be available after Mass to greet and answer questions.

## Commitment Weekend March 3-4

### Purpose of the In-Pew Request

On Commitment Weekend (March 10/11), all Parishioners attending Mass are invited to make a commitment in support of the Catholic Appeal. This is done through a parish-based invitation, called an “in-pew request.”

It is a standard in most dioceses, and many parishes in our archdiocese have incorporated it into their Catholic Appeal campaign. Some parishes have even adapted it to help with their offertory programs.

This year, in order to be eligible for a rebate or abatement, parishes must conduct an in-pew campaign at all Masses. Even if your parish conducted an in-pew in 2017, it is important to launch your 2018 Catholic Appeal with an in-pew solicitation.

#### **The reasons to conduct the in-pew request are:**

- **It seeks an intentional gift.** The in-pew request helps to ensure that there is a brief moment in time when the ministries provided by the Archdiocese are considered by parishioners.
- **It reaches more people than mailings alone.** While the response rate on Catholic Appeal mailings is excellent, a letter alone is rarely sufficient to implement the campaign.
- **It helps to keep records updated.** Parishes making an in-pew request often identify new parishioners who are not registered at the time of the Appeal. The Appeal team can help your parish update your records through the in-pew request. Additionally, the in-pew request often provides email addresses for parish outreach.
- **It helps to ensure early success.** Some parishes are able to reach their assessment within a few weeks of Commitment Weekend meaning a shorter and more successful Appeal campaign.
- **It is a powerful reminder that central ministries serve parishes.** Through witness talks, bulletin announcements, emails, and the in-pew request, parishioners can better understand the ways in which central ministries are at work in their parish.

The Pastor’s Commitment Weekend presentation is very important to the success of the campaign. Up to this point, parishioners have heard about the Catholic Appeal and why it is so very important to support it. Some may have already pledge by mail. Now is the time to ask all the rest of the parishioners for their financial support. The fact that the Pastor is leading the process will have a very positive effect on the importance that people place on the request.

The following pages contain two sample scripts for an in-pew request to your parishioners. Please choose the one you think would work best at your parish and adapt as needed.

## Scripts for the In-Pew Request

### **In-Pew Presentation Script (Option A - Full Script):**

In recent weeks, we have heard about the Catholic Appeal and how it sustains the central ministries serving our parishes, Catholic schools, and other organizations around the Archdiocese. Many of you have already made a gift or pledge. Thank you! To date, our parishioners have made gifts totaling **\$XX**. Our goal in support of central ministries is **\$XXX**.

Today, we're going to take a few minutes to invite everyone to support the Catholic Appeal. At this time I would like to ask one member of each household to raise your hand so that we can give you a pledge envelope and a pencil. Please take an envelope even if you have already given or cannot give at this time. You can indicate either of those choices on the envelope.

While we are waiting, please open the flap, look at the suggested giving guidelines that are on the top and consider making a pledge that makes the most sense for you and your family.

For parishioners who have already given on-line or through the Cardinal's outreach letter, please complete the shaded areas only. Please do not indicate any additional financial information on the envelope. We do not want to double count your pledge.

*(Pause and make sure that everyone has received an envelope and pencil; then continue with the script.)*

Now, please look at the pledge form (if appropriate, note Spanish/Portuguese translation on reverse side).

*(Pause)*

First, check off how you would like to be addressed. On the next line, print your first and last name.

*(Pause)*

On the next line, write your spouse's first and last name, if applicable.

*(Pause)*

Next, write your address, including apartment number, if applicable.

*(Pause)*

On the next line, print your city, state, and zip code.

*(Pause)*

On the next line, provide your preferred phone number along with your email address. The email address is especially helpful to us. *Please know your personal information is confidential and will not be shared with any organizations outside the Archdiocese.*

*(Pause)*

Next, please write **PARISH NAME/TOWN** on the space indicated. This is important so that your gift can be properly credited to our parish. If you are visiting from another parish, you may write that parish name and town in the space instead.

*(Pause)*

If you wish to pay by check, please mark that box and make your check payable to “The Catholic Appeal.”

If you wish to make a gift by credit or debit card, please select the type of card you are using. Include all of your card information and be sure to sign the form so your card may be charged. Please indicate if you are making a one-time gift or paying in ten monthly installments.

*(Pause and wait until about half of those participating are looking back at you.)*

Moving to the right side of the form, write the total amount you wish to pledge. Again, there is a guide on the top flap to help you make your pledge.

*(Pause)*

It’s not necessary to make a payment today. Fill in the amount of your total gift, the amount you are enclosing, and the balance due. You will be sent monthly reminders for any balance due.

Please be sure to tear off the commitment form, place it in the envelope and seal it. Keep the pencil separate and drop it in the collection basket along with your completed pledge envelope.

The ushers will now collect your pledge envelopes and pencils.

On behalf of Cardinal Seán and myself, thank you for your contribution to the Catholic Appeal. May God bless you.

**In-Pew Presentation Script (Option B – Excludes line-by-line guidance on competing form):**

In recent weeks, we have heard about the Catholic Appeal and how it sustains the central ministries serving our parishes, Catholic schools, and other organizations around the Archdiocese. Many of you have already made a gift or pledge. Thank you! To date, our parishioners have made gifts totaling **\$XX**. Our goal in support of central ministries is **\$XXX**.

At this time we are going to take a few minutes to give everyone the opportunity to respond to this year's Appeal. I'd like to ask one member of each household to raise your hand so we can give you a pledge envelope. Please take an envelope even if you have already given or cannot give at this time.

For parishioners who have already given on-line or through the Cardinal's outreach letter, please complete the shaded areas only. Please do not indicate any additional financial information on the envelope. We do not want to double count your pledge.

*(Pause and make sure that everyone has an envelope and a pencil.)*

We'll now take a few minutes to fill out the form, (if applicable, note Spanish or Portuguese translation on reverse side). First, take a look at the left side of the form. Be sure to complete your name, address, town, and zip code. We also need you to complete your phone and email address. It really helps us to reach out to you if there are any questions. Please note your personal information will not be shared with any organization outside the Archdiocese. Make sure you include our parish name and town in the space indicated for home parish so we get credit for your gift. If you are visiting from another parish, you may write that parish name and town in the space instead. Now, I will wait for a minute or so until everyone has completed their personal information.

*(Pause and make sure that it looks as though most people have completed their contact information.)*

Now, take a moment to review the box on the top flap of the envelope. These are just suggested gift levels, but they show how a pledge can be paid over ten months. With this guide, take a moment to complete the amount of your pledge. You'll see that it's not necessary to make a payment today. Simply fill in the amount of your pledge, the amount you are enclosing in the envelope, and the balance due. If you are making a pledge, you'll be sent monthly reminders for any balance due. I know that some of you want to use a credit card or check, so I will wait for a moment or two to make sure everyone has completed their payment information.

*(When it looks as though most have completed the form, continue with the script.)*

Please tear off the commitment form, place it in the envelope along with any payment, and seal the form. The ushers will now collect your envelope. On behalf of Cardinal Seán, thank you for your contribution to the Catholic Appeal.

## Goals and Assessment

Every parish in the Archdiocese of Boston is given a *Catholic Appeal assessment*, *financial goal*, and *in-pew* response goal for the annual Catholic Appeal, including each parish within a collaborative. Goals are available on the Catholic Appeal website and are mailed to parishes in February.

The Catholic Appeal assessment is equal to Eight Percent (8%) of Base Revenue. Base Revenue is calculated as the three (3) year average of the following income components:

- Offertory/Offertory Monthly – amounts collected from parishioners at weekly Masses for support of the Parish at either the first or second collection. This includes amounts collected for this purpose, whether collected at Mass, mailed, paid by credit card, electronically funded, or any other means.
- Grand Annual – amounts collected as the result of an annual solicitation(s) often to be used for a specific designated purpose in support of the Parish. This includes amounts collected for this purpose, whether collected at Mass, mailed, paid by credit card, electronically funded, or any other means.

The financial goal is calculated by taking the **higher** of 1) your three-year PAID pledge average from 2015, 2016, and 2017 Catholic Appeal or 2) your 8% IFRM Catholic Appeal Assessment.

The In-pew goal is calculated by taking the parish October 2017 Mass count divided by the average family size (3 per the Massachusetts census) and then multiplying this amount by 30% (the average in-pew response for parishes fully implementing the Catholic Appeal).

### 2018 IN-PEW RESPONSE GOAL

2017 MASS COUNT	# OF FAMILIES (2017 MASS COUNT ÷ 3)	IN-PEW RESPONSE GOAL (# OF FAMILIES X 30%)
<b>300</b>	<b>100</b>	<b>30</b>

The parish in-pew count is equal to the total number of in-pews completed both with and without a stated gift/pledge (blank envelopes are not included in the total). Donor’s who have given on-line or through direct mail, have the same opportunity to participate in the in-pew process. By completing the simplified in-pew envelope (writing their name, parish and checking “I have already given to the Catholic Appeal” or “I do not wish to make a gift at this time”), their envelope is also counted towards the parish goal. This allows for full participation of all parishioners.

## Rebates and Abatements

### **Conditions to Rebates and Abatements (New with 2018 Catholic Appeal)**

In order to qualify for a Rebate or Abatement, parishes must meet or exceed their "In-Pew Goal" by implementing the in-pew campaign best practices AND engage a Catholic Appeal Coordinator volunteer.

### **Catholic Appeal Rebates**

A Rebate "Pool" will be created for those parishes that meet the conditions stated above and exceed their *Catholic Appeal Assessment*. For those parishes that exceed their Assessment, 50% of the amount over Assessment will be directed into "the Pool". Money from the pool will first pay for abatements. The balance of the Pool will then be distributed to qualifying parishes on a pro-rata basis. Qualifying parishes can expect to receive from 40% - 60% of their amount over assessment.

### **Abatement Requests**

Parishes that do not meet their Catholic Appeal assessment and are experiencing financial difficulties may apply for an abatement. In order to be considered for an abatement, parishes **must** demonstrate they have completed the following:

- Recruited a volunteer Catholic Appeal Coordinator (NOT an employee)
- Implemented best practice recommendations for Announcement and Commitment weekends including the in-pew process on Commitment Weekend.

**Abatement applications will be reviewed by the Abatement Committee established by the Archbishop. Parishes that met the conditions stated above may apply for a partial or full abatement based upon financial need. Catholic Appeal abatement forms will be available at [bostoncatholicappeal.org](http://bostoncatholicappeal.org), Parish Resources by mid November 2018 and distributed in the parish weekly mailing. The timing for submission of the applications will be noted in the materials.**

## Catholic Appeal Website Information

[www.bostoncatholicappeal.org](http://www.bostoncatholicappeal.org)

The Catholic Appeal website is a valuable resource for your parish. Each tab has important information for you and your parishioners.

- **HOME:** Catholic Appeal results by parish are available on the home page and are updated each Friday. Passwords are not required to access this report.
- **WAYS TO GIVE:** Our secure website allows parishioners to give online to your parish campaign. This section also provides information regarding other types of donations including checks, matching gifts, appreciated securities, stocks, and donor-advised funds.
- **PARISH RESOURCES:** Overall parish results and any other resources for running a successful Appeal will be available on the Parish Resources home page and will not require a password. The password protected section is for your donor and LYBUNT reports only.

### Parish Reporting

Catholic Appeal results are updated weekly on Friday afternoons. An email is sent to all Pastors, Appeal Coordinators, and Business Managers when the reports are available. If you are not receiving this email update, please email [Catholic\\_Appeal@rcab.org](mailto:Catholic_Appeal@rcab.org) to be added to the distribution list.

All reports can be found at: [www.bostoncatholicappeal.org](http://www.bostoncatholicappeal.org).

1. **Donor Report (Password Protected):** This is a parish specific report which lists current Appeal year gifts and pledges by donor. The report summarizes total giving to date, total over / under assessment, number of donors and giving method. Due to the new rebate pool, reports will no longer calculate estimated rebate.
2. **LYBUNT (Last Year But Unfortunately Not This) Report (Password Protected):** This is a parish specific report which lists parishioners who gave in 2017 but have yet to make a gift to the 2018 Appeal. Please review periodically for deceased or inactive parishioners. Send all updates to [Catholic\\_Appeal@rcab.org](mailto:Catholic_Appeal@rcab.org).
3. **Parish Results:** Reports total gifts and pledges, along with in-pew count for all parishes. This report is available on the Catholic Appeal website homepage and Parish Resources landing page, and does not require a password. Parish results are updated as quickly as possible. During peak remittance times (March through mid-April) it may take longer for parish results to reflect all receipts.

*\*Please note that your username and password will remain the same as last year (unless otherwise requested) and will be mailed to parishes along with Appeal materials in February. Pastors of a collaborative may request one username and password that can be used to access reporting for each parish within the collaborative.*

## Gift Processing

All Catholic Appeal pledge forms, checks, and envelopes should be submitted as soon as possible for processing using the envelopes, bank bags, and FEDEX materials sent to your parish. Please be sure your volunteer counters are aware of the processes below.

**On Commitment Weekend, do not open envelopes. Be sure to secure all Catholic Appeal In-Pew envelopes and donations in a locked cabinet until they can be mailed for processing.**

Each parish will receive four FEDEX bags and labels to use at the beginning of the Catholic Appeal. In addition, we are sending each parish five pre-addressed manila envelopes for smaller gift batches to be used after Commitment Weekend. If you need additional materials, please contact Arlene Dubrowski at 617-779-3706 or Catholic\_Appeal@rcab.org

### Instructions for Processing Donations:

#### 1. Do NOT open donation envelopes

- a. *For the purpose of donor security, we ask that you DO NOT open envelopes.*
- b. Write or stamp your three-digit parish number on all envelopes to ensure parish credit.
- c. Bundle all in-pew envelopes. Place envelopes inside the (clear) bank bag, and write your three-digit parish number on it.
- d. Place bank bag inside FEDEX envelope, attach label, and drop in the closest FEDEX bin.

#### 2. If parishioners give loose coins or bills (not in an envelope)

- a. Tally all loose coins/bills and deposit into your parish account
- b. Write a check from your parish account made payable to "The Catholic Appeal" for the corresponding amount
- c. Mail using bank bag and FEDEX envelope

#### 3. For checks received WITHOUT an envelope

- a. **IF THE CHECK IS MADE PAYABLE TO THE PARISH:** Endorse the check over to the Catholic Appeal by writing "pay to the order of the Catholic Appeal" on the back of the check, followed by a signature from an authorized signatory of the parish. Bundle checks, place in (clear) bank bag with three-digit parish number written on it and place bag inside the FEDEX envelope. Attach the label and drop in the closest FEDEX bin.
- b. **IF CHECKS ARE MADE PAYABLE TO THE CATHOLIC APPEAL:** Bundle these checks together, place in (clear) bank bag and write three-digit parish number on it. Place bank bag inside the FEDEX envelope, attach label, and drop in the closest FEDEX bin.

#### 4. Ship Package

- a. Retain a copy of the FEDEX air bill for tracking purposes
- b. To find the location of the nearest FEDEX bin go to **FEDEX.com**
- c. For security reasons, the Catholic Appeal FEDEX account number is no longer printed on the mailing labels. **Pick-ups are not available.**

d. Packages should be addressed to the Catholic Appeal's secure lockbox agent at:

**Datamatix, Inc.**  
**480 Neponset Street, Bldg. 16**  
**Canton, MA 02021**

**Any single pledges or donations that require special handling should be mailed to:**

Catholic Appeal Office  
Attn: Wendy Bartlett  
66 Brooks Drive  
Braintree, MA 02184

617-779-3708 or WBartlett@rcab.org

**\*\* Please do not mail or drop off your Commitment Weekend in-pews to 66 Brooks Drive. It will only delay processing. All in-pews must be sent to the lockbox address for deposit and processing.**

## Gift Processing Updates and FAQ

Donors often call the parish with questions about their Catholic Appeal donations. Below are some frequently asked questions to assist you, or you can always contact the gift processing team at 617-779-3700.

<i>Parishioner Question</i>	<i>Response</i>
Parishioner is receiving duplicate, inaccurate, or unwanted mailings	Please email or call us with the details so that we can update our records: <b>catholic_appeal@rcab.org or 617-779-3700</b>
Parishioner's check to the Catholic Appeal has not cleared OR parishioner made a donation and it is not listed on your donor report	Contact our office to ensure we are not behind with our gift processing at <b>617-779-3700</b> OR <b>catholic_appeal@rcab.org</b> <b>**PLEASE NOTE: at the launch of the Appeal it is not uncommon to have a three week processing delay due to large volume.</b>
Parishioner needs to change their credit card information	Please advise parishioners to use proper security when updating their credit card. Card information should never be sent via fax, email, or left in a voice message. Contact the Catholic Appeal office at <b>617-779-3700</b> and we can make the necessary changes.
Parishioner made an electronic gift on the parish website meant for the Catholic Appeal	Transfer the money into the Parish account and send a check, made payable to "The Catholic Appeal." <b>Please include parishioner's name and address for proper processing and acknowledgement.</b>
Donor is looking for his or her tax letter	Tax letters are mailed the 2 <sup>nd</sup> week in January to donors who gave \$250 or more January 1 to December 31. If a donor did not receive their letter or made a donation of under \$250, a tax letter can be generated. Please call: 617-779-3700
Donor wants to submit a matching gift request with his/her donation	Parishioners should inquire with their employer for matching gift eligibility. Some companies will not match to religious organization. The tax ID for the Catholic Appeal is 04-2106175.
Parishioner would like to donate stock or make a gift of appreciated securities	Ask the parishioner to contact his/her broker for the transfer. Instructions and required documents are available on our website: <b>bostoncatholicappeal.org/waystogive</b>
Parishioner would like to make a donation to the Catholic Appeal using his/her donor-advised fund (i.e. Fidelity Charitable Gift Fund)	<b>Please identify the Catholic Appeal using: Roman Catholic Archbishop of Boston tax ID 04-2106175.</b>

### **Inclement Weather Schedule**

In the event of inclement weather, please go to **bostoncatholicappeal.org**, Parish Resources, for more information. The Catholic Appeal office will email parishes regarding any alternate schedules and will have a message on the Appeal phone line at 617-779-3700.

### **Annual Catholic Appeal Staff**

For questions regarding parish reporting, donor updates, gift processing, Appeal materials, rebates, abatements, or issues accessing the Catholic Appeal website OR for general Appeal questions including implementation of your parish Appeal and recruiting an Appeal Coordinator, please contact:

**Arlene Dubrowski**

Catholic Appeal Manager  
617-779-3706  
adubrowski@rcab.org

**Wendy Bartlett**

Gift Processing Manager  
617-779-3708  
Wbartlett@rcab.org

*Thank you for your continued  
Support of the Catholic Appeal.*

