

# Faith

IN ACTION

*It all starts with*

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PROCEDURAL GUIDE

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My Dear Friends in Christ,

The purpose of the Catholic Appeal is to unite the faithful of the Archdiocese of Boston in support of the more than 50 Central Ministries which serve the needs of our parishes, schools, and communities.

Each year, Catholics throughout the Archdiocese are asked to help advance the work of the Church, both within and beyond the boundaries of their parishes, through their generosity and commitment to the Catholic Appeal. It is only through the generosity of our wonderful donors that our Church can continue to bring Christ's love to our world in greatly needed and meaningful ways.

The Catholic Appeal provides a teachable moment. It allows parish leaders the opportunity to talk about the connectedness of our Church. 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.

The success of the Appeal is not possible without each and every one of you. I am deeply grateful for your faithful commitment to this effort, which inspires us all as we continue to put faith into action to help all those who seek out the Church for assistance.

Thank you for your help.

A handwritten signature in blue ink that reads "+ Seán, OFMcap".

Cardinal Seán O'Malley  
*Archbishop of Boston*

## What the Catholic Appeal Supports

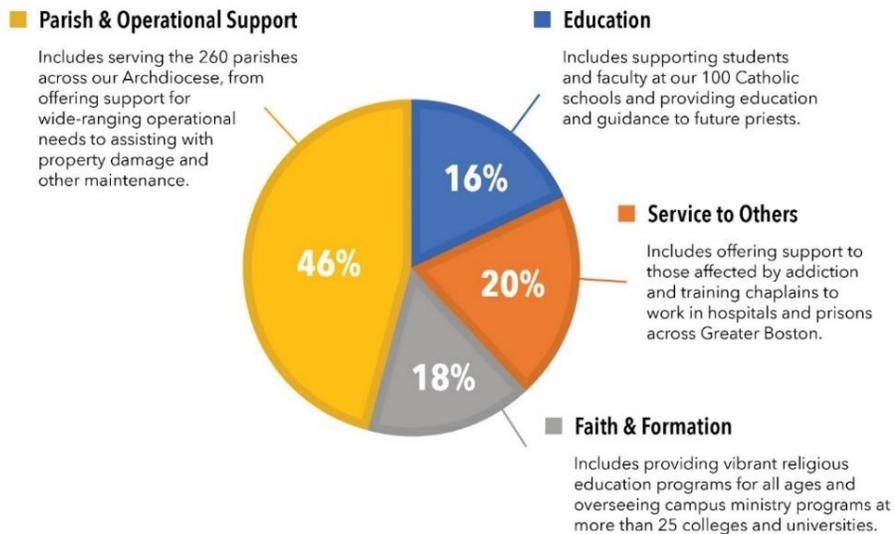
The Catholic Appeal helps fund the Central Ministries of the Archdiocese, which make programs and services possible both within and beyond the walls of your parish.

**The Catholic Appeal provides funding for a team of experts your parish can rely on.** Overarching support for your parish through Risk Management, IT, Benefits, and Human Resources departments provide immediate and vital services to your parish. These are services that a parish could not afford to provide on its own.

**The Catholic Appeal provides funding for faith programs that enrich the lives of Catholics throughout your parish community.** Programs such as Transformed in Love, Faith Formation, Permanent Diaconate, and Vocations are all programs to accompany those on their faith journey.

**The Catholic Appeal provides funding for programs that serve Catholics and non-Catholics alike.** Chaplains who serve in hospitals and prisons, as well as programs that affirm life like Palliative Care and the Pro-Life Office's Pregnancy Help Centers serve our brothers and sisters in need regardless of religious affiliation.

### 2021 CATHOLIC APPEAL



#### DID YOU KNOW?

More than \$1,000,000 in rebates is returned to parishes that meet their assessment each year.

## **Roles & Responsibilities**

Launching a successful campaign takes teamwork. Each of the following roles is crucial in ensuring your parish runs a successful Catholic Appeal campaign.

### **Pastor**

**Your support and participation is the most significant factor in the success of your parish's Catholic Appeal campaign.** Parishes who meet or exceed their goal do so because the pastor is a vocal supporter and advocate for the importance of donating to the annual Appeal. As pastor, you will provide leadership by publicly endorsing the Appeal and working with your Appeal Coordinator and parish staff to ensure that the parish plan and schedule are followed.

### **Appeal Coordinator**

As your parish's Appeal Coordinator, you will work with your pastor, parish staff, and the Catholic Appeal Team to ensure a successful parish campaign, by:

- Attending a one-hour, virtual training
- Ensuring your parish is prepared and set up for your launch (materials received, volunteers enlisted, etc.)
- Endorsing the Catholic Appeal on Announcement Weekend: March 5/6
  - Provide a brief witness talk about the Catholic Appeal at all Masses.
  - Show the Catholic Appeal video with a brief introduction
- Ensuring the In-Pew Presentation is completed on Commitment Weekend: March 12/13.
- Providing assistance throughout the year to promote the Appeal in your parish through bulletins, social media, and other parish outreach.
- Staying updated on parish results and reviewing with pastor as necessary.

### **Parish Staff**

- Ensure receipt of and organize all Catholic Appeal materials that are delivered to the parish (posters, in-pew envelopes, bank bags, bulletin ads/inserts, etc.)
- Ensure bulletin ads/inserts are regularly added and Mass Announcements/Prayer of the Faithful are updated when necessary
- Coordinate with your pastor/Appeal Coordinator in planning for Announcement/Commitment Weekends
- Ensure controls are in place to store/send Appeal donations in a timely manner.
- Review Parish results and share with Pastor and Appeal Coordinator.

**Our team is here to help every step of the way.  
Call 617-779-3706 or email [catholicappeal@rcab.org](mailto:catholicappeal@rcab.org)**

## Your Parish Campaign Timeline

### February 2022: Parish Preparation and Roll Out

#### Throughout the month you will be receiving materials to prepare for your launch:

- Posters to hang before weekend of 2/12
- In-pew envelopes. Available in multiple languages.
- FEDEX labels, large packs, and clear bank bags
- Return envelopes to use throughout the Appeal
- Parish Goal sheet

#### IMPORTANT DATES THIS MONTH

<b>February 8</b>	First Solicitation Letter from Cardinal Seán Mailed to Parishioners
<b>February 12</b>	Hang posters in multiple locations
<b>February 19/20</b>	First weekend you should include ads* in your bulletin/social media/website
<b>February 26/27</b>	Last weekend before the Appeal officially launches in your parish, include ads* in your bulletin, post to social media, add to website

*\*This year we are providing easy-to-insert ads for your bulletins that contain the QR code for simple giving. Visit [bostoncatholicappeal.org/for-parishes](https://bostoncatholicappeal.org/for-parishes) for all ads, including translated versions in Spanish, Portuguese, Vietnamese, and Haitian Creole.*

### March 2022: Parish Launch

#### March 5/6: Announcement Weekend

Announcement Weekend is your first opportunity to promote the 2022 Catholic Appeal in your parish during Masses. This weekend is extremely important to launch a successful campaign and prepare your parishioners to make their gift on Commitment Weekend. There are three main components to this weekend:

#### **1. Include the bulletin insert provided by the Catholic Appeal Office**

If your parish uses LPI, Pilot Bulletins, or JS Paluch the insert will be automatically placed in your printed bulletins. If your parish uses a different company, you will be responsible for insertion. The insert will be mailed to your

parish the week of February 22 so you can ensure insertion for Announcement Weekend. Single page inserts will be available in Spanish, Portuguese, Haitian Creole, and Vietnamese. Parishes should print and insert.

**2. Coordinate volunteers to give a “Witness Talk” during Masses**

A witness talk is key to explaining to parishioners the importance of the Catholic Appeal and should be given by the Appeal Coordinator or another volunteer from the parish. To view sample witness talks that you can use to craft your own, visit [bostoncatholicappeal.org/for-parishes](http://bostoncatholicappeal.org/for-parishes).

*PLEASE NOTE:* This year, we will be providing parishes with translated versions of the witness talk, which will also be available by accessing the above link.

**3. Share the 2022 Catholic Appeal Promotional Video**

This year’s video is less than 3 minutes long and does a great job of showing the impact of the Catholic Appeal on our parishes, schools, and communities. If you are able, consider playing the video during Mass before or after the witness talk is given. If you are not able to play the video during Masses, add it to your parish website, post it to your social media page, or send it in an email to your parish list. The video link, as well as instructions on how to embed it on your website can be found at [bostoncatholicappeal.org/for-parishes](http://bostoncatholicappeal.org/for-parishes).

**March 12/13: Commitment Weekend**

Commitment Weekend is when parishioners are asked to make their gift to the annual Appeal during the In-Pew Presentation. There is no more effective way to reach your goal and promote participation than the In-Pew Presentation. Here are a few things you will want to do in preparation for this weekend:

- 1. Recruit volunteers** to assist with distributing and collecting in-pew envelopes.
- 2. Prepare your In-Pew Presentation for ALL Masses.** Scripts for you to follow are available at [bostoncatholicappeal.org/for-parishes](http://bostoncatholicappeal.org/for-parishes). For parishes with multiple worship sites, please share the script with visiting priests.

*PLEASE NOTE:* This year, we will be providing parishes with translated versions of the in-pew presentation, which will also be available by accessing the above link.

- 3. Prepare ways to give for parishioners who may be attending Mass virtually** by adding the QR code to your livestream or ensuring that you provide the web address for those at home who will want to donate online.

## **March 19/20: Follow-Up Weekend**

For parishes with multiple worship sites or in case of inclement weather, you can use this weekend as a back-up for Commitment Weekend. If that is not necessary, use this weekend to remind your parishioners that they can still make their gift to the Appeal.

**Ensure there are in-pew envelopes available in the Church, make a Mass announcement to encourage giving, and be sure to include the bulletin ads in your bulletin or livestream of Masses.**

## **Week of March 21: Follow-Up Email Solicitation**

Sending out a follow-up email is an easy and effective way to remind your parishioners to make their gift to the Appeal. The Catholic Appeal Team will provide you with all necessary components for this email for you to build and send through your email system (i.e. Constant Contact, MailChimp, Flocknote, etc.). The document with these components will be available at [bostoncatholicappeal.org/for-parishes](https://bostoncatholicappeal.org/for-parishes) and will also be sent to your parish via email the week of March 14.

# **April - August 2022: Ongoing Parish Campaign**

Your continued promotion of the Appeal will help ensure its overall success. Here are some things to consider during the months after your Appeal launch:

- 1. Opt-in to the Pastor Solicitation Letter coordinated by the Catholic Appeal Team.** The response to this letter in 2021 was extremely positive. Parishes that opted in to have this letter sent on their behalf saw more donations and more parishioner participation than those parishes that did not. If you have not yet reached your goal, this is an extremely effective way for you to ask those parishioners who have not yet given to make their impact before the fiscal year ends. Sign up forms are available at [bostoncatholicappeal.org/for-parishes](https://bostoncatholicappeal.org/for-parishes).
- 2. Remind parishioners they can still give to the Catholic Appeal if they have not yet done so.** Use your bulletin, parish website, and social media to provide parishioners with ways to make their gift. Continue including ads in your bulletins and use content from Catholic Appeal eblasts or social media posts to share with your parish in whatever way you think would work best.
- 3. Provide weekly updates regarding your parish Appeal.** Many parishes have notes from the Pastor or Parish Staff in their weekly bulletins. Use this space to share updates on your parish Appeal. If appropriate, consider crafting an email update to parishioners as well.

4. **Remember to thank your parishioners.** Every donor who makes a gift to the Appeal receives a thank you letter from Cardinal Seán, but we encourage you to thank your parishioners separately for their support. Consider sending thank you notes and/or adding a message of gratitude in your bulletin or on your website/social media.
5. **Congratulate your parishioners for a successful campaign.** Celebrate any milestones your parish hits during the Appeal via bulletin or Mass announcements, and on your website/social media. Reaching parish goal, increasing parishioner participation, and receiving a rebate check are all things to celebrate with your parish family!

### **IMPORTANT DATES TO REMEMBER**

<b>April 19</b>	Second Solicitation Letter from Cardinal Seán (or Appeal Co-Chairs) Mailed to Parishioners
<b>June 2</b>	Third Solicitation Letter from Cardinal Seán Mailed to Parishioners OR Pastor Solicitation Letter Mailed to Parishioners
<b>August 9</b>	Fourth Solicitation from Cardinal Seán Letter Mailed to Parishioners

## September 2022 - January 2023: Closing Your Campaign

These last few months are crucial to close out your parish campaign.

#### **If your parish has not met it's assessment:**

- Continue reviewing results and donor reports to find those who have not yet given and consider an appeal to those donors. A personal call or note from the pastor can encourage support.
- Contact the Catholic Appeal Team ([catholicappeal@rcab.org](mailto:catholicappeal@rcab.org)) to discuss creative ways for you to solicit more donations effectively.
- For parishes with financial hardship relief is available through the abatement process. Application forms will be available in November 2022 and should be submitted by December 2022.

#### **If your parish has met it's assessment:**

- You are eligible to receive a rebate. The 1<sup>st</sup> installment of rebate payments is calculated as of September 30<sup>th</sup> and paid in early October. At the close of the appeal (2/1/2023) final rebate payments are made.

## Catholic Appeal Parish Goals

Every parish in the Archdiocese of Boston is given a Catholic Appeal fundraising goal.

This goal includes your parish Appeal Assessment (8% of your parish base revenue - a three-year average of offertory and grand annual). The assessment is the goal for many parishes. However, some parishes consistently surpass their assessment and therefore have a larger goal (calculated by taking the average of all Catholic Appeal paid pledges in years 2019-2021).

At a minimum, parishes should meet their assessment. Any amounts raised over assessment are used to calculate a parish's rebate. Parishes not meeting their assessment will be charged for the shortfall.

The Parish is also given a participation goal equal to 30% of your parish families contributing to the appeal.

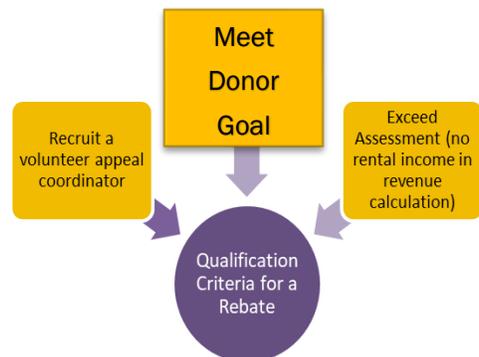
**Parish goals are mailed to pastors and are also available on the Catholic Appeal website: [bostoncatholicappeal.org](http://bostoncatholicappeal.org) / For parishes**

### Parish Rebates

**Parishes that exceed their Catholic Appeal Assessment, meet their donor goal, and have a volunteer Appeal Coordinator are eligible for a rebate.** Rebates are calculated at 50% over assessment, less abatement allocation. Rebates are distributed in two installments in October and February.

### Billback or Abatement Process

Parishes that do not meet their Catholic Appeal Assessment will be billed in four monthly installments for their shortfall: (March 2023 – June 2023). Parishes with financial hardship and / or extraordinary circumstances are encouraged to apply for an abatement (shortfall forgiveness). Abatement forms are available in November and parishes will be notified of their request status in January 2023.



## **Catholic Appeal Website & Reporting**

The Catholic Appeal website, [bostoncatholicappeal.org](http://bostoncatholicappeal.org), is a valuable resource as you run your parish campaign. It is also a great resource to share with your parishioners so they can learn more about the impact of the Appeal, donate online, and learn about different ways they can make their annual gift. As you prepare your parish campaign, these two pages will be especially helpful to you:

### **FOR PARISHES**

[bostoncatholicappeal.org/for-parishes](http://bostoncatholicappeal.org/for-parishes)

- This is where you will find your **Parish Summary Reports**, which will be updated each week. Please note that passwords are not required to access this report.
- You will also find all promotional materials and other helpful resources to use throughout your parish campaign (as well as translations).

### **WAYS TO GIVE**

<https://bostoncatholicappeal.org/ways-to-give/>

- This page provides information regarding different ways for donors to make their gift to the Appeal, including via matching gifts, stocks, donor-advised funds, and planned gifts.

## **Parish Reporting**

Catholic Appeal results are updated weekly on Monday afternoons and are posted to [bostoncatholicappeal.org/for-parishes](http://bostoncatholicappeal.org/for-parishes).

**PLEASE NOTE: During peak remittance times (March through mid-April) it may take longer for parish results to reflect all receipts.**

Each week, your parish detailed **donor report** will be emailed to your parish secure email: (Example: BA123@RCABoston.org). This report details all donors to your parish Catholic Appeal campaign, as well as totals and estimated rebate. Business Managers are encouraged to share these reports with their pastor and finance council, if applicable.

Each month, your parish **LYBUNT (Last Year But Unfortunately Not This) Report** will be emailed to your parish secure email account. This report lists parishioners who gave in previous years, but have yet to make a gift to the current Appeal. You should review this list periodically to check for deceased or inactive parishioners and send any updates to [catholicappeal@rcab.org](mailto:catholicappeal@rcab.org)

## Processing Donations at Your Parish

All Catholic Appeal in-pew envelopes and checks should be submitted as soon as possible for processing using the envelopes, bank bags, and FEDEX materials sent to your parish.

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 white envelopes to be used after Commitment Weekend. If you have any questions or need additional materials, please contact Arlene Dubrowski at 617-779-3706 or [adubrowski@rcab.org](mailto:adubrowski@rcab.org).

### Instructions for Processing Donations:

#### **STEP 1: Collect donations at your parish and prepare to ship**

Please review the instructions below to ensure you process and package all forms of donations in the most efficient way.

#### (A.) FOR IN-PEW ENVELOPES RECEIVED AT YOUR PARISH:

1. **FOR THE PURPOSE OF DONOR SECURITY, PLEASE DO NOT OPEN ENVELOPES FOR ANY REASON.**
2. Write your three-digit parish number on the outside of all envelopes to ensure your parish receives credit for each donation.
3. Bundle all in-pew envelopes and store them in a secure location until mailed.
4. Place envelopes inside clear bank bag and write three-digit parish number on it.
5. Place clear bank bag inside FEDEX envelope and attach label.

#### (B.) FOR LOOSE COINS/BILLS NOT ENCLOSED IN ENVELOPE:

1. Tally all loose coins/bills and deposit into your parish account.
2. Write a check from your parish account made payable to "The Catholic Appeal" for the corresponding amount.
3. Place clear bank bag inside FEDEX envelope and attach label.

### **(C.) FOR LOOSE CHECKS RECEIVED WITHOUT ENVELOPE**

- 1. If the check is made out to the parish:** Simply write “pay to the order of the Catholic Appeal” on the back of the check and include a signature from an authorized signatory of the parish.
- 2. If the check is made out to the Catholic Appeal:** you do not need to write anything on the check.
- 3.** Bundle all checks together, place in the clear bank bag and write three-digit parish number on it. Place bank bag inside the FEDEX envelope and attach label.

### **STEP 2: Ship package for processing**

To ensure proper shipping, please review the steps below.

- 1.** Address package to the Catholic Appeal’s secure lockbox agent: **Datamatix, Inc., 480 Neponset St, Bldg. 16, Canton, MA 02021.**
- 2.** To find the location of the nearest FEDEX bin go to [FEDEX.com](https://www.fedex.com).
- 3.** Bring your package to the nearest FEDEX bin and simply drop it in!
- 4.** Be sure to retain a copy of the FEDEX air bill for tracking purposes.

*NOTE: For security reasons, the Catholic Appeal FEDEX account number is no longer printed on the mailing labels. **Pick-ups are not available.***

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

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

## Gift Processing FAQ

Below are frequently asked questions to assist you. If you can't find the answers to your questions here, please don't hesitate to contact the Catholic Appeal Team at [Catholic\\_appeal@rcab.org](mailto:Catholic_appeal@rcab.org)

FAQ	Response
Parishioners donated to the Catholic Appeal on the PARISH giving page.	<p>The donor does not need to do anything. Once you have processed that donation on your end, simply send a check made payable to "The Catholic Appeal" for the amount of their donation.</p> <p><b>**Remember to include parishioner's name and address so we can properly process and acknowledge their donation.</b></p>
Parishioner is receiving duplicate, inaccurate, or unwanted mailings from the Catholic Appeal.	<p>Please email or call the Catholic Appeal Team at <a href="mailto:catholicappeal@rcab.org">catholicappeal@rcab.org</a> or <b>617-779-3700</b> to make the necessary changes to our records.</p>
Parishioner called about a check that has not cleared or is not listed on your parish donor detail report	<p>Contact the Catholic Appeal Team to ensure we are not behind in processing at <b>617-779-3700</b> or <a href="mailto:catholicappeal@rcab.org">catholicappeal@rcab.org</a>.</p> <p><b>**PLEASE NOTE: at the launch of the Appeal, it is common to have a delay up to 3 weeks as we process extremely high volumes of donations.</b></p>
Parishioner needs to change/update his /her credit card information	<p><u>For security reasons, donors should never send credit card information or updates electronically or via voicemail.</u> Your parishioner should contact the Catholic Appeal Team directly at <b>617-779-3700</b> to make the necessary changes.</p>

## **Catholic Appeal Contacts**

The Catholic Appeal Team is available to help and guide you through this process so that your parish can run the most successful campaign possible. Don't hesitate to reach out if you have questions or concerns regarding parish reporting, donor updates, gift processing, Appeal materials, rebates, abatements, issues accessing the Catholic Appeal website, or anything else that may come up during your parish campaign.

**Arlene Dubrowski**  
Catholic Appeal Manager  
617-779-3706  
[adubrowski@rcab.org](mailto:adubrowski@rcab.org)

**Wendy Bartlett**  
Gift Processing  
617-779-3708  
[wbartlett@rcab.org](mailto:wbartlett@rcab.org)



*We could not do what we do without you.*

Thank you for your support and  
commitment to the 2022 Catholic Appeal!

