

ARCHDIOCESE OF SAN FRANCISCO



2022 ARCHDIOCESAN ANNUAL APPEAL

CAMPAIGN PLANBOOK

“As I have done for you, you should also do.”

John 13:15

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THE MISSION OF THE ARCHDIOCESE OF SAN FRANCISCO

We the Catholic Church of San Francisco, in a communion of faith and charity with the successor of Peter, reach out and receive with welcoming arms all of God's people: the saint and the sinner; the young and the elderly; the poor and the rich; the immigrant and the native; the lost sheep and those still searching.

At this unique moment, as we stand at the crossroad leading to the Third Millennium, we recognize ourselves as pilgrim people called by God and empowered by the Spirit to be disciples of Jesus Christ.

We pledge ourselves to be a dynamic and collaborative community of faith known for its quality of leadership, its celebration of the Eucharist, its proclamation of the Good News, its service to all in need and its promotion of justice, life, and peace.

*Rich in diversity of culture and peoples
and united in faith, hope, and love
we dedicate ourselves to the glory of God.*

In this our mission we each day seek holiness and one day heaven.

I. OVERVIEW

The Archdiocesan Annual Appeal (AAA) provides parishioners throughout our Archdiocese a unique opportunity to come together. Through the AAA, the ninety-one parishes in our Archdiocese unite!

The AAA is essential to the work of the Archdiocese of San Francisco. Although we are spread over the counties of Marin, San Francisco, and San Mateo, we are *one* Archdiocese, collaborating in the ongoing mission of evangelization and education.

The theme for this year's Annual Appeal is from John 13:15, "*As I have done for you, you should also do.*" Together, we demonstrate God's grace through the AAA by supporting such critical needs as youth and young adults, parish schools and students, social ministries, ecumenical efforts, and the greater Church.

We ask for your help in instilling in the hearts of Catholics throughout the Archdiocese a true sense of stewardship and a recognition that our family of faith extends beyond our individual parish boundaries.

This planbook is designed to help every family in the Archdiocese realize the significance of the Appeal and the fact that each of us changes lives by supporting it. Specifically, this manual is designed to:

- Assist you with implementing the AAA in your parish
- Highlight the Appeal's significance – by demonstrating our commitment to mission and ministry through combined financial support
- Assist with gift receipt/processing procedures

A. Purpose of the Archdiocesan Annual Appeal

The gifts received through the Appeal are able to support ministries, programs and services at a level that an individual donor or individual parish would not be able to by itself. Among other ministries, the AAA:

- Supports our children's future by making Catholic education more accessible.
- Sponsors ethnic ministries that reach our diverse communities.
- Assists vocation discernment and education.
- Provides religious education to parish youth and strengthens the faith of our young adults.
- Educates the community about important social policy concerns.
- Provides essential services to our parishes.

The total goal for the 2022 Archdiocesan Annual Appeal is **\$5,800,000**. Following are a couple of the specific ways that your gifts help change lives through the AAA:

- The Office of Marriage and Family Life serves couples and families in the Archdiocese, primarily through programs for engaged and married couples, and services for parents. Ongoing programs include an annual Wedding Anniversary Mass, couples' retreat, support for marriages in crisis, grief ministry, Mother/ Daughter events, and Catholic men's conferences. New ministries include a healing retreat for adults with divorced parents, support for parents grieving the loss of a child, and mental health ministry for those struggling with mental illness.
- The Office of Human Life & Dignity implements the Church's foundational social teaching – human life is sacred - in its commitment to justice and care for all through education, activism, and healing ministries. We collaborate with parishes, ministries, and many organizations to address and support Catholic Social Teaching...that all flows from the fundamental Catholic principle of the right to life and dignity of every human person, from conception to natural death.
- Several innovative communications initiatives will enable us to highlight our mission and people. Our revitalized website shows how Christ is being proclaimed throughout our Archdiocese...a second, more internal, website provides resources for parish staffs so they can more effectively assist parishioners...Flocknote enables pastors and ministry leaders to directly engage parishioners via text and email...and our new magazine colorfully showcases pastors and parishioners throughout the Archdiocese living the Gospel.

Please contact us with any questions and/or if you need specific assistance during the Appeal.

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II. MINISTRIES & PROGRAMS SUPPORTED BY THE 2022 AAA

<i>Ministries and programs supported by the AAA</i>	<i>AAA funding</i>	<i>Percent of total</i>
PARISH MINISTRY & SCHOOLS	\$1,500,291	26%
School and Parish subsidies ● Faith Formation Youth and Young Adults ● Office of Worship ● Office of Evangelization ● Marriage and Family Life ● Teacher Incentive Grants ● Child & Youth Protection		
SOCIAL MINISTRIES	\$1,227,519	21%
Hospital/Prison Chaplains ● Tribunal ● Youth and Young Adult Ministry ● ACCW ● Restorative Justice ● Respect Life ● Chinese Ministry ● Pastoral/Ethnic Ministry ● Ecumenical and Interreligious Programs		
CLERGY SUPPORT	\$1,767,048	30%
Vicar General ● Vicar for Clergy ● Office of Consecrated Life ● Priests Education Fund ● RES Retirement Fund ● Serra Clergy House ● Office of Vocations ● Permanent Diaconate ● Diaconate Formation		
UNIVERSAL CHURCH & COMMUNICATIONS	\$1,305,142	23%
Holy See ● USCCB ● California Catholic Conference of Bishops ● Department of Communication ● Catholic San Francisco ● Catolico San Francisco ● TV Mass ● Radio H		
TOTAL FOR SERVICES & MINISTRIES	\$5,800,000	100%

The remainder of the Archdiocesan budget also benefits our parishes and schools by providing services such as finance, human resources, payroll, Mission Advancement, legal, and property management.

III. KEYS TO A SUCCESSFUL ANNUAL APPEAL

While the circumstances of each parish differ, there are several items that appear to contribute to a successful AAA. Select those that may work for you and your parish community and use as you feel is appropriate.

1. The *advocacy and enthusiasm of the Pastor is critical*. Maintain a positive approach toward the Appeal and its role in fulfilling our mission in the Archdiocese.
2. In order to maximize success, *education* about the benefits of the AAA and the people who need and depend on its services is vital. Although there is awareness of the AAA's benefits, education should be ongoing. The Mission Advancement Office can provide personal stories of people who have benefitted from donors' support of the Appeal.
3. Conduct the AAA campaign over a finite period of time – approximately *six weeks*.
4. *In-pew solicitation* – designate a weekend as AAA weekend and invite the parishioners to support the AAA during that weekend's Masses. This is particularly effective for obtaining gifts from a large segment of the parish at one time with a minimal amount of volunteer effort.
5. Use *personal contact* with parishioners in various ways (an in-pew ask, follow-up letter(s), pulpit announcements, bulletin reminders, etc.). *Engage, update, and follow-up*.
6. *Encourage every member of your parish family to participate*. **All gifts, regardless of amount, are greatly appreciated and beneficial.**
7. Encourage parishioners to consider a *pledged gift*. A pledge is a non-binding commitment to pay a specific amount over time (e.g., each month of the year). It provides the opportunity to make a larger gift than would likely occur if paid all at once. Payments are sent directly to the Office of Finance. Pledge reminders will be sent to parishioners from the Archdiocese.
8. Consider starting a "1% Club" - this simply means inviting parishioners to consider giving 1% of the parish's AAA goal. For example, if a parish's goal is \$50,000, parishioners would be asked to give \$500 to become members of the 1% Club.
9. If you designate a weekend on which you are going to kickoff the AAA in your parish, consider asking some parishioners who are strong supporters of the AAA to make their gifts prior to asking the entire parish to contribute. This will provide momentum and initial credibility to the chances for the Appeal's success.
10. 100% of the funds raised in excess of a parish's goal are returned to the parish for its own use - identify a need in your parish and communicate how what is raised in excess of the goal will be used.
11. The Office of Mission Advancement wants to thank donors promptly and honor the donor's payment requests (Credit/Debit/EFT). **Please send in all completed gift envelopes in a timely manner.**

IV. MATERIALS

The primary informational and communication materials for the 2022 AAA campaign are listed below. All are available in English and Spanish.

1. Poster and Thermometer

- The poster and thermometer are visible reminders of the Appeal and its purpose. Please display them in heavy traffic areas around the parish.

2. Brochures (In-pew envelopes)

- These communicate what the AAA is and how it benefits our greater community. The brochures are also used as in-pew envelopes for Appeal Sunday.

3. Video (DVD)

- The AAA video tells the story of the Appeal. Through the video, direct beneficiaries of the AAA are able to speak directly to parishioners throughout the Archdiocese.
- The most effective way to use it is by showing it at each Mass (we will provide you with a DVD for that purpose). We will also provide you with a link so that you can post it on your parish website and send it by email to your parishioners.

If you need more materials, please contact Jennie Dahl in the Mission Advancement Office at 415-614-5583 or dahlj@sfarch.org.

V. WAYS TO GIVE

1. One-time gift

- Online at SFArch.org/AAA
- By *using the brochure*: mail it to the Chancery or your parish (Chancery preferred)
- Via *check*: mail to the Chancery or your parish (Chancery preferred)
- Gifts may also be made via *transfer of stock or property*

2. Pledged gift

- Pledged gifts (recurring gifts) require that the donor specify an amount and the number of months to charge their account.
- If a pledge is initiated at the parish, the pledge form must be forwarded to the Finance Office of the Archdiocese.
- Online gifts can be paid by VISA, MasterCard, American Express, or by an ACH direct debit transfer from a bank account.
- Monthly pledge statements are mailed to each parishioner who has made a pledge. A self-addressed return envelope is included for the donor's use when remitting payment.

3. Stocks and Mutual Fund Shares

- All gifts of stock require an authorization letter from the donor or the donor's representative. Transfer instructions for stock or mutual fund donations and a sample authorization letter are included on pages 20 and 21 of this Planbook.

4. Matching Gifts

- Some companies offer matching gifts. Encourage your parishioners to check with their employers to see if this is the case.

VI. SUGGESTED PLAN AND TIMETABLE

The following six-week timetable is structured so that your campaign would begin on Sunday, February 6 and conclude on Sunday, March 13 (Ash Wednesday is on March 2). The plan is centered around an *in-pew solicitation* that would take place on the weekend of March 5-6. **Of course, each parish is different, so please amend this timetable in whatever manner is most appropriate for your parish community.**

Below are listed suggested activities that correspond to each of the six weekends of the plan. Suggested pulpit announcements and bulletin inserts are included. In general the same wording can be used for both - there is no need to develop a separate announcement and insert.

Pre-campaign preparation - week of Monday, January 24th

- All AAA materials should have been received by the parishes.
- AAA parish administrators confirm that there are enough brochures for an all-parish mailing and an in-pew solicitation on the parish's Annual Appeal weekend.

Week of January 31st

- Mail the initial letter and materials to all registered households and previous donors to the Annual Appeal.
- Materials sent to parishioners could include the Archbishop's cover letter, the Pastor's personalized letter, and the AAA 2022 brochure/envelope.
- Recruit parishioners to speak about the Annual Appeal at your Masses.
- Prominently display your set of posters and thermometers

Weekend #1: February 5-6 (Pastor introduces the AAA)

- Pulpit Announcement #1 (Sunday, February 6) – **Pastor**
- Bulletin Insert #1 (Sunday, February 6) – *sample follows*

2022 ARCHDIOCESAN ANNUAL APPEAL KICKOFF SUNDAY

I hope all of you received my letter highlighting this year's Archdiocesan Annual Appeal. On behalf of youth, young adults, seminarians, social ministries, and everyone who your gifts to the Appeal supports, I ask you to prayerfully consider giving to the 2022 Annual Appeal. Through our support, we join others throughout our Archdiocese in answering God's call to discipleship by supporting His work.

Thank you in advance for your prayerful consideration of this request. Your generosity improves lives.

Weekend #2: February 12-13 (Lay presenter weekend)

- Pulpit Announcement #2 (Sunday, February 13) – **Lay presentation (a sample is on p. 17)**
- Bulletin Insert #2 (Sunday, February 13) – *sample below*

CALLED TO CARE AND TO SHARE

The Annual Appeal is our one chance annually to join with Catholics throughout our Archdiocese and assist those who depend on us. Your generosity supports social justice ministries, our schools, and Marriage & Family Life programs, to name just a few. On behalf of everyone who needs and utilizes our programs and services, I invite you to support this Appeal. It is critical to our mission and ministry as an Archdiocese.

In a couple of weeks we will have Appeal Weekend, and each household is asked to make a special effort to support the people we assist.

The Appeal also helps our parish since all dollar raised above our parish goal will be directed towards _____ (parish need). Please prayerfully consider your gift and respond as you are able.

Weekend #3: February 19-20 (President's Day Weekend)

- Brief reminder of the Appeal's benefits and that next weekend is Appeal Weekend (see below)
- The Annual Appeal is critical to our mission in this Archdiocese. Through it, we support school children, Marriage & Family Life, Clergy, Human Life & Dignity, and many other programs. Next week all members of our parish family will be invited to support the Appeal. Everyone is asked to prayerfully consider supporting this critical ministry and the people who need and depend on it.

Weekend #4: February 26-27 (Appeal weekend: in-pew request by Pastor)

- Pastor speaks on the Appeal and shows the AAA video
- Report on gifts to date
- Bulletin Insert #4 (Sunday, February 27)
- *There is no separate Pulpit Announcement due to the Pastor's in-pew request*

In-pew solicitation for the AAA has proven to be very effective in many of our parishes. It enables the parish to ask a large number of parishioners for their support at the same time. If possible, set the tone for the request by filling out your own gift form prior to asking others to do so.

A. The *traditional* In-pew process on Appeal Weekend

- The Appeal brochures are placed in the pews (ask the ushers to replenish the supply of brochures and pencils/pens before each Mass).
- Pastor shares his thoughts in support of the Appeal and its benefits, and asks for a prayerful and generous response.
- The Appeal video is shown.
- The importance of each family participating is stressed – all gifts are appreciated and beneficial.
- Pastor or lay person provides step-by-step instructions on filling out the gift brochure.
- Ushers collect the completed donation envelopes after people have had sufficient time to complete them, **OR** parishioners are asked to drop them in the collection basket.

B. Items needed

- DVD (to be shown at Mass)
- 4-5 minute talk by the Pastor
- In-pew solicitation – brochures, pencils/pens, and the request
- Bulletin insert

C. Sequence of events on Appeal Weekend

During the Masses

- After the Gospel, show the Appeal video.
- Pastor speaks for four-five minutes about the importance of the Appeal to the mission of the Archdiocese and the people who need and depend on the services it provides.

In-pew solicitation (this can be led by the Pastor or a lay presenter)

On the following page are a few thoughts for making the specific request. The request takes place at the conclusion of talking about why the Appeal is so critical:

- At this time, I ask that a member of each household to take a brochure.

- I have made my own gift to the Annual Appeal, and I ask you to join me and parishioners throughout the Archdiocese and make yours. Our goal is 100% participation.

(PAUSE)

- If you have participated in the past, I ask you to please consider giving 10% more than what you gave last year. For those of you with the capability, I ask you to consider giving 1% or more of our goal of \$.
- If you have never contributed to the Appeal, please consider giving \$10.00 each month. What's most important is participation - all gifts, regardless of amount, are greatly appreciated and beneficial.
- If you are unable to participate, we ask for your prayers for the success of the Appeal and the people it benefits.
- There are a variety of ways you can contribute:
 - **Pledge:** Pledging will enable you to spread the payments over a ten/eleven-month period (the rest of the year). If you are paying something now, please indicate that amount where it reads: "Amount enclosed." Also be certain to indicate the total amount you want to gift.
 - **One-time gift today:** If you are making your entire gift today, please indicate that amount where it reads: "Amount enclosed." You may give by check, cash or credit card. If you wish to give by Credit Card, please indicate the type of credit card, write your account number, expiration date, name on the card, and sign in the space provided.
 - If you choose to give online, electronically through your bank account (ACH), or by using Stocks, Bonds or Mutual funds, please follow the instructions listed on the brochure.
- I ask every family to join me in supporting this vital effort. Again, our goal is 100% participation.
- If you are unable to participate, we ask for your prayers for the success of the Appeal and the people it benefits.

(Pause for at least 60 seconds)

- When you have completed your form, please seal it and pass it to the end of the row (or put it in the collection basket.) On behalf of everyone the Appeal benefits, I thank you very much!

D. Role of the parish AAA Administrator

- Please make sure there are enough brochures and pencils/pens to be distributed at all Masses for the Appeal weekend and follow-up weekends.
- Instruct volunteers regarding distribution and collection of AAA brochures in-pew.
- After Mass, please remove any brochures left in the pews, and redistribute the pens or pencils if there is another Mass. *It is critical to have pens or pencils available in the pews.*

WEEKS 5 & 6: FOLLOW-UP

- The Follow-up phase is a critical part of the Appeal process. It helps ensure that every parishioner is given the opportunity to make a gift to the Appeal. Since many people do not attend Mass at their home parish each Sunday, follow-up is very significant.
- During the Masses on the two weekends of the follow-up phase, the Pastor or lay presenter should repeat their request to those who have not yet made a decision to support the Appeal. By doing so, many who were absent on Appeal Sunday may have the opportunity to make a gift.

Follow-up weekend #1: March 5-6

- Report on gifts to date and thank all who have donated thus far
- Short reiteration of the AAA case and need
- Invite parishioners who have AAA envelopes to place them in the collection basket
- Provide AAA brochures at a table(s), in-pew, or by the exits, and invite those who have not had a chance to participate in the appeal to do so.
- Pulpit Announcement #5
- Bulletin Insert #5 – *sample is below*

JOIN THE SUCCESS!

If you have not yet made a gift to the Annual Appeal, we ask you to do so today. We invite everyone to share a portion of God's blessings with others by supporting the Annual Appeal. Your gift has a great impact.

We hope for 100% participation from our parish family this year. Thank you for your support of our Archdiocesan ministries and the people who need and depend our programs and services.

- Report on gifts to date and thank all who have donated thus far
- Invite parishioners who have AAA envelopes to place them in the collection basket
- Pulpit Announcement #4
- Bulletin Insert #4

Follow-up weekend #2: March 12-13

- Report on gifts to date and thank all who have donated thus far
- Provide AAA brochures at a table(s), in-pew, or by the exits, and invite those who have not had a chance to participate in the appeal to do so.
- Pulpit Announcement #6 – sample below (can be used beyond March 12-13)
- Bulletin Insert #6

IF YOU HAVE NOT YET HAD THE OPPORTUNITY...

We are very excited and encouraged by the response of our parish family thus far to the Annual Appeal. If you have not yet made your gift, we ask you to do so today. We invite everyone to share a portion of God's blessings with others.

Every gift makes a real difference. We hope for 100% participation from our parish family this year. Thank you for your support of our Archdiocesan ministries and the people who need and depend on our programs and services. Your generosity changes lives.

Thank You! : March 19-20

THANK YOU!

Thank you! To all those who have already participated in the 2022 Archdiocesan Annual Appeal, we are most appreciative. Your gifts have helped our Church continue helping those who need and depend on the ministries and services of the Archdiocese.

All gifts to the Appeal are very beneficial, so please consider making a gift if you have not already done so. Please be as generous as you are able. Your gift changes lives.

VII. SAMPLE (DRAFT) LETTERS

Pastor's sample letter #1

Announcing the Appeal (on parish letterhead)

January XX, 2022

Dear _____,

The Archdiocesan Annual Appeal enables the Archdiocese to continue offering many vital ministries, programs, and services to the people of the Archdiocese of San Francisco.

Through the AAA, the over ninety parishes in our Archdiocese unite as one body. Together, we demonstrate our active faith by supporting such critical needs as youth and young adults, parish schools and students, social ministries, ecumenical efforts, and the greater Church. The Appeal is integral to our mission and ministry.

This year's theme is from John 13:15, "*As I have done for you, you should also do.*" The Archdiocesan Annual Appeal is an important way for each of us to contribute to the work of the Church.

On behalf of everyone who needs and depends on the ministries and services of the Archdiocese, I ask you to prayerfully consider supporting the 2022 Archdiocesan Annual Appeal. Our support will help change the lives of those who need and depend on the programs and services of the Archdiocese.

Our parish goal for this year's Annual Appeal is \$_____. Every dollar we raise in excess of our goal comes back to us. We intend to use that overage to fund_____.

We will have an Appeal Weekend (in a few weeks), and when that time arrives, I ask you to prayerfully consider making a sacrificial gift.

I thank you for all you do for (Parish), and I thank you in advance for your consideration of this request. Please join me in prayer for the success of the 2022 Archdiocesan Annual Appeal and everyone who needs and depends on the programs and services it provides.

Sincerely yours in Christ,

PASTOR

Pastor's sample letter #2

Announcing the Appeal (on parish letterhead)

("In-pew" process – if used for the first time)

Dear _____,

The Church has always depended on the support and generosity of its members to feed the hungry, shelter the homeless, educate our youth and care for our elderly.

The Archdiocesan Annual Appeal is an important way for each of us to contribute to this work of the Church. The Annual Appeal helps fund many ministries and services within our archdiocese that support the work of Christ. Through our gifts to the Appeal, we respond to the needs of the least among us.

On behalf of everyone who needs and depends on the ministries and services of the Archdiocese, I ask you to prayerfully consider supporting the 2022 Archdiocesan Annual Appeal. Our support will help change the lives of those who need and depend on the programs and services of the Archdiocese. The enclosed brochure provides more information on the people the Appeal benefits and their needs.

On the weekend of _____, we will show the Annual Appeal video and ask every family in our parish to support this critical endeavor.

Our parish goal this year is \$ _____. A successful Appeal will not only help those who need and depend on the services and ministries of the Archdiocese, but also our own parish. Every dollar we raise in excess of our \$XXX goal will be returned to us. We will use these funds in support of our own needs, such as _____.

I thank you for your prayerful consideration of this request. I also thank you for your commitment to St. XXX and our parish family.

Sincerely yours in Christ,

PASTOR

VIII. LAY PRESENTERS

Having a parishioner (lay presenter) speak at the Masses about the importance of supporting the Appeal will offer a unique and vital perspective to many of your parishioners.

Below are a few items to assist in preparation of the lay presenter's talk. **We also have a sample script that a lay presenter can use, and we would be pleased to assist you and/or the lay presenter in any manner.**

A. Why have a lay presenter?

- Peer-to-peer presentation can be very compelling. The lay presenter personalizes the Annual Appeal for all parishioners. The personal witness and individual testimony conveyed by the presenter's spoken word as well as his/her presence is powerful.

B. Who should be asked to make the presentation?

- A parishioner who is energetic, enthusiastic, and honest
- A long-time, active parishioner
- A consistent donor to the Appeal or someone who has helped conduct the Appeal previously
- A parishioner with the skills to convey the Appeal message
- A parishioner who has benefitted from Appeal funding

C. What should be the Lay presenter's message?

- The lay presenter should speak for approximately five minutes - right after the homily is optimal.
- He/she should give a brief outline of the Appeal's benefits to those we serve.
- The presentation must include an "ask"

D. Sample outline for Lay presenter talks

It is not necessary to use every suggestion below. Evaluate the circumstances in your parish to determine which will ensure a successful presentation.

- Remember that you are asking on behalf of those who need our assistance.
- Introduce yourself, your association with the parish, and how long you have been a member.
- Thank parishioners for all their previous support of the Appeal.
- Announce the AAA goal for your parish; stress the value of 100 percent participation.
- Share why you support the AAA and offer examples of how Appeal gifts have helped others.
- Explain how the Appeal benefits your parish through the archdiocesan services it supports. If your parish has previously received refunds, describe how those funds benefitted your parish.
- Emphasize that your parish is a partner in faith, working together with over 90 other parishes and missions to strengthen the Catholic Church throughout the Archdiocese of San Francisco.
- Conclude by asking parishioners to make a prayerful and generous response to this year's Appeal.

SAMPLE (DRAFT) LAY PRESENTER TALK

- Good morning (afternoon, evening). My name is _____. My family and I have been parishioners of (PARISH) for years.
- It's a great pleasure to speak about the 2022 Archdiocesan Annual Appeal. The Appeal is critical to our mission as an Archdiocese and as a parish, and today, I am asking you to join me in supporting it. The Annual Appeal enables all of us in the Archdiocese's 90+ parishes to come together and help the people who need and depend on the programs and services the Archdiocese provides.
- Next week (in a couple of weeks), Father (Pastor) will speak about the Appeal and give all of us the opportunity to participate in it. On behalf of everyone who benefits from the Appeal, I urge everyone in our parish to prayerfully consider your own support and respond as you are able. By doing so, we can make a difference in the lives of people throughout our Archdiocese – including here in our own parish.
- Our parish benefits from the Archdiocesan programs in so many ways. Some Archdiocesan ministries benefit our parish directly, such as those directed to train future priests and take care of our retired priests and religious who have served us. *(Be sure to also mention, if possible, any other Archdiocesan programs referred to in the brochure that benefit your parish, such as Catholic school tuition support, Deacons, RCLA, ethnic ministries, youth and young adult ministries, etc.)*
- Our goal this year is \$_____. Father (Pastor) would like to reach our goal and also have 100 percent participation from our parish community. I want to help Father (Pastor) accomplish both our financial and participation goals, and I ask you to join me in working towards this success.
- It's also important to mention that every dollar we raise in excess of our goal comes back to us. This year, if we surpass our parish goal we will use these funds to support_____.
- Let us all put our faith into action by supporting the Annual Appeal when Fr. (Pastor) asks us next weekend. I ask each of you here to prayerfully consider joining me in making a sacrificial gift in support of this greater mission.
- You may make your gift all at once or over time, if that is easier for you (a monthly gift over the next ten months, for example). While some parishioners will be able to give more than others, all gifts, regardless of amount, are greatly appreciated and tremendously beneficial. Your generosity changes lives.
- On behalf of everyone who benefits from the programs and services of the Appeal, I thank you for your time today, for your consideration of this request, and for your support of our parish in so many ways.

IX. FOLLOW-UP TO NON-RESPONDENTS

A follow-up letter (mailed with the Appeal brochure) can be an effective way of reaching those parishioners who have not yet contributed to the Appeal. By doing so, a parish will have invited all parishioners to make a gift to the Appeal.

SAMPLE #1: FOLLOW-UP LETTER TO NON-RESPONDENTS

Dear _____,

With \$_____ already received in gifts and pledges, our 2022 Archdiocesan Annual Appeal is coming along well here at (parish)!

This vital effort provides critical programs and services to people who need and depend on us, and it is our one chance each year to join with our fellow parishes throughout our Archdiocese.

If we are going to enjoy a great success, we need the involvement of all members of our (parish) community. We hope that each parish family will support the work of the Church through our Archdiocese by making a gift to the Appeal.

Please complete your donation card in a spirit of prayer, generosity, and Christian stewardship, and be sure to bring your gift to Mass next weekend and place it in the offertory. *All gifts, regardless of amount, are greatly appreciated and very beneficial.*

On behalf of all whose lives will be changed by your gift, thank you.

Sincerely yours in Christ,

PASTOR

SAMPLE #2: FOLLOW-UP LETTER TO NON-RESPONDENTS

Dear _____,

The Archdiocesan Annual Appeal helps support the shared cost of providing ministries and services throughout the Archdiocese of San Francisco.

We are trying to achieve 100% participation in the Annual Appeal. Because we have not yet received your pledge or gift, I am sending a brochure/donation form for your use. I hope that you prayerfully consider making a pledge to help us reach our parish goal of \$_____.

The size of your gift is not as important as is the fact that you give a prayerful response as a good Christian steward. Whatever you give to this critical work of Christ will be most appreciated. Please mail your gift today, or bring it to Mass next weekend and place it in the offertory.

All contributions over our parish goal will be returned for our own efforts here at (name). This year we intend to use the overage for _____(name the parish project).

Thank you for your support of our parish. May God continue to shower you blessings on you and your loved ones.

Gratefully yours in Christ,

PASTOR

PASTOR/PARISH THANK YOU(S)

- All parishioners who choose to participate in the Annual Appeal need and deserve to know that their generosity is appreciated and beneficial.
- Thanking people gives us an opportunity to let people know that their gift has impacted the lives of other people within our Archdiocese. It is also a good way to reinforce the stewardship message of gratitude by thanking the donor for sharing God's gifts in the service of others.
- Every donor to the Appeal is thanked by the Office of Mission Advancement. They should also be thanked by the Pastor via letter - and the entire parish should be thanked publicly and repeatedly from the pulpit and in the bulletin. This will show gratitude to those who sacrificed for the work of the Church, and also remind those who may not have given to the Appeal.

X. TRANSFER INSTRUCTIONS FOR STOCK OR MUTUAL FUND DONATIONS

For all gifts of stock:

- A letter of authorization from the donor to the parish is required.
- **To expedite processing of the stock donation and disbursement of funds, it is important for the donor to indicate the intention of the gift (program) and the Parish or School beneficiary.**
- Fax the “Stock Donation Instructions” letter to Jim Buckley at 415-364-4509 and Haryanti Ng at 415- 614-5516. A sample letter is included in this guide.

Stock or Mutual Fund Contributions

(1) Transfers from a Donor Account at a Brokerage House:

Note: Donor’s Broker must initiate transfer.

In addition to the letter mentioned above, please give the following information to the donor broker for transferring to the Archdiocesan broker. (Broker to Broker)

First Republic Securities Co., LLC
Attn: Jim Buckley
111 Pine Street
San Francisco, CA 94111

Phone: 415-364-4870
Fax: 415-364-4509
Email: jbuckley@firstrepublic.com

First Republic Securities Co., LLC **DTC #0443**

S.F. Archdiocese Account number is: **33L-070589**

Account Name: **Archdiocese of San Francisco**

Instruct your donor’s broker to include the following information on the trailer line (second line) of their transfer instructions.

FBO (provide Parish Name) and (Donor Name)

NOTE: Failure to include the above information for each transfer will delay identifying the donation and could cause us not to acknowledge the donation in timely manner.

(2) Stock Certificates donated directly by Donor:

Instruct the donor to deliver the stock certificate and an executed stock power to your Parish Office.

OR they can deliver their stock certificate and an executed stock power form (via registered mail) to First Republic Securities at the above address. A letter of authorization must accompany the stock certificate and executed stock power.

SAMPLE LETTER FOR STOCK DONATION INSTRUCTIONS

Date: _____

Mr. James Buckley
First Republic Securities Co., LLC
111 Pine Street
San Francisco, CA 94111

Re:

Dear Mr. Buckley:

Please accept this as your authorization to deposit _____ shares of
_____ stock into account no. 33L-070589, for the Archdiocese of San
Francisco.

This donation is for the benefit of *(Parish/ School)* _____

(indicate program or campaign) _____.

Sincerely,

Customer Signature

Joint Customer Signature

Phone Number: _____

Fax a copy to Haryanti Ng at (415) 614-5516 or email at Ngh@sfarch.org.

XI. PROCESSING GIFTS AND PLEDGES

The Archdiocese assists in the campaign by processing and recording the gifts and running a pledge administration system.

- **NEVER SEND CASH IN THE MAIL** - Deposit cash in your parish account and issue an exchange check made payable to the Archdiocesan Annual Appeal. Write the corresponding donor ID(s) and the worksheet number(s) on the exchange check and mail it with its worksheet to the Office of Finance.
- For all new donors (not included in the Master List) listed on the Exchange Check Worksheet, please include complete donor information: salutation, complete first and last name(s), complete address, email and phone numbers (if available).
- Mail all checks, credit card donations to the Office of Finance. There is no need to do a worksheet unless it is an Exchange Check. For your records, make a copy of all the checks and credit card forms that you send to the Office of Finance.

It is especially important to provide the donor breakdown with the exchange checks. Without comprehensive and accurate accounting of donors and their gift amounts, the Mission Advancement Office is unable to properly thank the donor and provide the necessary and legally required tax documents to donors.

- Reconcile parish donation records each week using the Archdiocesan Annual Appeal (AAA) Gift Summary report.
- The Archdiocese does not retain credit card information year-to-year. Donors who wish to donate by credit card must renew donation authorizations every year by filling out an AAA brochure that provides credit card information and include an original signature.
- Donors may mail their gifts directly to the Archdiocese using our pre-printed donation envelopes. The parish listed in the Archdiocesan record will be the default parish unless the donor indicates which parish is to be credited for his/her gift.



CONTACT THE OFFICE OF MISSION ADVANCEMENT IF YOU HAVE QUESTIONS OR NEED ASSISTANCE!

We want your parish to enjoy a successful AAA. Please contact **Jennie Dahl** if you have questions or need help at (415) 614-5583 or dahlj@sfarch.org.

Commented [RW1]: 2019

AAA 2022 EXCHANGE CHECK WORKSHEET

**MAIL TO: AAA 2022 - ARCHDIOCESE OF SAN FRANCISCO: ONE PETER YORKE WAY SAN FRANCISCO, CA 94109
ATTN: FINANCE DEPARTMENT**

DATE: _____

PARISH ID # AND NAME: _____

PREPARED BY: _____

***** Note: For donor salutation please enter one of the following: Mr., Mrs., Mr. & Mrs., Ms., Miss, Dr., Deacon, Rev., Rev. Msgr., Sister, Sr., Srta.**

	DONOR ID (for previous donors only)	Salutation	First & Last Name(s) - husband and wife (if applicable)	Complete Address (for new donors)	E-mail Address	Phone Number	Amount included in exchange check
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
				TOTAL AMOUNT OF EXCHANGE CHECK:			

XII. REPORTS AND LISTS

Archdiocesan generated lists and reports are distributed electronically. The email is sent to the Pastor and anyone authorized by the Pastor to receive the reports. If you would like to add or change an authorized person, please contact Jennie Dahl at dahlj@sfarch.org.

Since the reports contain confidential data about parishioners and parishes, AAA administrators are asked to use discretion when granting access to these reports.

Master List - this is a list of parish donors who contributed to the AAA during the previous five years. It displays donor ID, profile and contact information. Parish AAA Administrators are requested to check accuracy of donor information for their parish and report any discrepancies to the Office of Mission Advancement.

Gift Summary by Donor - displays parish donors that have made a gift to the AAA. This report includes donor commitment amount (one-time gift or pledge), the sum of payments against the commitment, and the balance due. The report also displays the parish AAA goal, cash received against the goal, and the goal balance. **This report is generated weekly and distributed electronically every Tuesday.**

Gift Summary over the past seven days - displays parish donors that have made a gift to the AAA in the past seven days. **This report is distributed electronically every Tuesday.**

XIII. GIFT ACKNOWLEDGEMENTS

All gifts to the Archdiocesan Annual Appeal are very beneficial and greatly appreciated.

- *On-line gifts* are acknowledged via email immediately after the gift is processed.
- All other gifts are acknowledged the following month after the gifts are received and recorded by the Office of Mission Advancement at the Chancery.

Special Acknowledgements

- Less than \$500 – letter from the Office of Mission Advancement
- \$500 - \$1,999 – letter from the Office of Mission Advancement with a special note from the Director of Mission Advancement
- \$2,000 - \$4,999 – letter from Moderator of the Curia/Vicar for Administration
- \$5,000 and above – letter from the Archbishop

- Acknowledgement letters under \$250 will include the IRS statement, and donors will not receive another tax letter unless requested. Acknowledgement letters for donors who give \$250 and above to the 2022 AAA (one-time or cumulative) will be sent an End-of-Year tax letter no later than January 31, 2023.