

## INTRODUCTION

This handbook has been prepared especially to assist you in conducting the **Catholic Services Appeal**. You will once again see many similarities to the previous year's handbook. **However, new suggestions and materials are provided each year to help to continue the success our appeal has had, so be sure to review the 2010 CSA handbook closely.**

Included is an overview of the appeal along with timelines, sample letters, suggestions for priest's remarks and lay witnesses, intercessions, pulpit and bulletin announcements, instructions on how to submit CSA data via PDS and other resources that will be helpful as the appeal is being conducted.

In addition to the handbook, other CSA materials include:

- ❖ Special CSA issue of Faith Magazine (mailed at the beginning of February)
- ❖ Posters
- ❖ Pledge envelopes for in-pew solicitation and follow-up mailings.
- ❖ Pledge cards printed with parishioner names. Extra blank pledge cards are also provided.

In order for the Catholic Services Appeal to be successful, it is recommended that a number of key steps are followed. This manual can assist you in taking those steps. There are also some steps that will be taken on the Diocesan level, and we hope that some of these efforts will assist in increasing awareness of how the diocesan offices help to provide services to those in your parish. We also urge you to try to develop new and creative ways to help all parishioners better understand the services and ministries provided by their larger Diocesan Church and the need to support these services annually. As always, you will be provided the basic tools you need to conduct your campaign, but only you can utilize these tools in the implementation of the appeal at your parish.

### **Theme and Goal**

The theme of the 2010 CSA will once again be "**Of One Heart and Mind**" which comes from Acts 4:32. In this chapter of Acts, those in the new community of Christians brought their gifts and laid them at the feet of the Apostles. This was, in a way, the first annual appeal for the Church. Those early believers recognized how the Church could take care of those in need.

We have decided to make this the official theme for the CSA. People will begin to identify the CSA with "Of One Heart and Mind". We have used this theme for three consecutive years, and each of those years the CSA has achieved record pledge totals. It is our hope to continue this success and that those members of our Diocesan Church will continue to be "of one heart and mind" as they look to support the 2010 CSA.

There is much to be grateful for in reflecting on the results of the 2009 CSA, considering the economic climate during which the appeal was held. Yet those economic conditions remain, so the 2010 CSA will also be challenging. As anticipated, the average gift was less than it was the previous year. But this decline was offset by an increase in the number of donors. The overall number of donors grew by about 5%.

Nonetheless, there continues to be room for more growth in the number of donors. The number of families giving to the CSA is still not where it was earlier this decade. We continue to advocate doing all you can to increase the number of people contributing. It is very possible to do this. Analysis of donors of the past several years shows that there are nearly 6,000 who gave to the CSA in 2006 through 2008 who did not give in 2009. **Past donors are your best prospects to give again.** If every parish makes an effort to get these lapsed CSA donors who gave at least once the past three years to give again, every parish would see an increase in the number of CSA donors this year. (Note that these figures are based on current parishioners)

With this in mind, we are proposing a donor goal of 24,400 donors for the 2010 CSA. This is a 6% increase over last year's totals. Included in the handbook is a donor goal chart (on pages 58-60) for each parish. This goal is based on the total number of CSA donors over the past three years. **Most parishes reached their CSA dollar goal in 2009, and by increasing donors, parishes would keep any additional funds.** Please use this donor goal as an internal goal. The publicized goal should always be 100% participation. Your donor goal is one gauge for determining how much additional follow-up you should consider doing. Using PDS, it is quite easy to run a report of lapsed donors.

## **THE PURPOSE OF THE CSA**

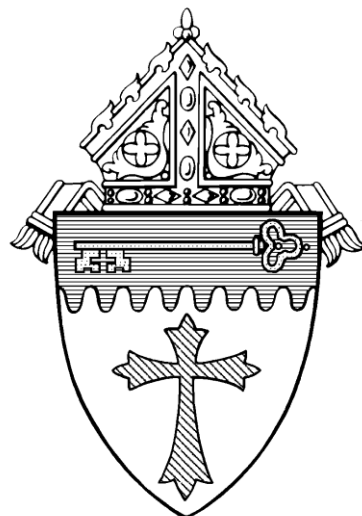
The purpose of the Catholic Services Appeal is to help provide funding necessary to carry out the mission of our diocese -- namely to fulfill our call to "serve the people of Northwestern Pennsylvania. Through evangelization, education, charity, service, the proclamation of Word and the celebration of Sacrament, the mission of our Community is to call forth the gifts of individuals in order to enable each person to advance the reign of God and achieve full human potential and salvation in Christ."

The CSA supports numerous Diocesan services and ministries, some of which attend to needs that are beyond the scope of any individual parish. Some exist for the sole purpose of assisting parishes in their mission to teach, evangelize and provide good liturgical experiences. It is important that the people of our diocese recognize both aspects of the appeal.

If at any point during the CSA there are any questions, problems or additional needs, please contact the Diocesan Annual Appeals Office.

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Diocese of Erie  
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## CASE FOR SUPPORT

Below is a list of the Diocesan departments which provide the services and ministries supported through the generosity of the people of the diocese. Each department and those offices within them play a role in helping the Diocesan Church carry out its mission.

### Catholic Charities

Prince of Peace Center	Pre-Cana	Separated & Divorced Ministry
Good Samaritan Center	Engagement Encounter	Deaf Ministry
St. Martin Center	NOVA	PALS (People After Loss from Suicide)
St. Elizabeth Center	Family Ministries	Disabilities Ministry
Harborcreek Youth Services	Retrouvaille	Refugee Ministry
Catholic Charities Counseling & Adoption Services	Rainbows	Diocesan & International Missions
Christ the King Manor	Victorious Missionaries	Mission of Friendship
John XXIII Home	Faith & Light	Parish Social Ministry
Catholic Rural Ministries	Parish Care & Concern	Peace & Justice Programs
Elizabeth Ministry	Bereavement Ministry	Respect Life Ministry
Marriage Enrichment Programs		

### Clergy Formation

Clergy Continuing Education	Vocations Office	Permanent Diaconate Program
Support for Major Seminarians	Emmaus Program for Clergy	St. Mark College Formation

### Financial Services

Accounting and Budgeting	Parish Financial Services	Human Resources
Facilities and Risk Management	School Financial Services	Erie Diocesan Cemeteries
Operation of The Star Foundation	Computer Services	

### Office of Evangelization

**Communication** - Publishes bi-monthly *Faith* magazine, bi-weekly *FaithLife* news bulletin, weekly electronic Information Bulletin, manages Diocesan website ([www.eriecnd.org](http://www.eriecnd.org)). Also creates annual Diocesan directory and various special publications, including the annual tribute to clergy and women religious celebrating jubilee anniversaries. Handles all media relations and inquiries.

**Worship and Outreach** - Supports parish liturgical prayer life. Serves as a resource for parish liturgies. Offers workshops, spiritual formation, and training sessions for all liturgical ministers. Develops and supports shared communications among Parish music directors and liturgy planners. Prepares all liturgies with the bishop. Offers training in the catechetical and ritual elements of the RCIA process. Facilitates the Rite of Election of new Catholic Converts.

### Office of Clergy Services

Provides services to clergy including health insurance, retirement, and continuing education and formation. Also helps priests arrange substitute priests and provides training for new pastors.

### Diocesan Administration

Bishop's Office	Vicar General's Office	Chancellor's Office
Judicial Vicar	Regional Episcopal Vicars	Vicar for Religious
Office for the Protection of Children and Youth		

### Office of Education

Programs for Catholic Schools	Curriculum	Teacher Personnel	Educational Services
Government Programs	Athletics	Religious Education	Media Resource Library
Youth & Young Adult Ministry	Campus Ministry	Christian Formation	Natural Family Planning
Lay Ministry Training	Small Faith Groups		

### Office of the Tribunal

Provides a healing, pastoral ministry to parishioners who have experienced a failed marriage and who may wish to again marry in the Church.

### The Catholic Foundation

The Catholic Foundation supports religious, educational, social and pastoral ministries by investing the gifts of donors who wish to make a lasting difference for people throughout the 13 counties of the Roman Catholic Diocese of Erie. Office of Stewardship and Annual Appeals (including the Catholic Services Appeal).

# TIPS FOR A SUCCESSFUL CATHOLIC SERVICES APPEAL

The following are some tips that will help you have a successful appeal.

- **BE PREPARED** - Review the Leadership Handbook and all CSA materials provided. Have a good understanding of how the gifts to the CSA benefit the many ministries and services it supports. If you have any questions, call the Annual Appeals at 800-374-3723 ext 192.
- **START EARLY** - Give your parishioners some advance notice that the appeal will be happening soon. **Since our appeal does not take place on the same weekend each year, it is helpful to give parishioners advance notice of the CSA.** This can be done by sending an initial letter from the pastor, bulletin announcements, announcements from the pulpit and putting up the CSA poster in late January. A sample initial letter is included on page 52 of this handbook.
- **BE ENTHUSIASTIC AND CREATE A POSITIVE IMAGE** - Make the success of your Catholic Services Appeal your goal. Let people know your desire for a successful appeal. If the leadership shares that the CSA is something important and worthwhile, the parishioners will see that as well. A positive attitude toward the appeal can be contagious.
- **INFORMATION IS OUR GREATEST TOOL** – Make each parishioner aware of the importance of the appeal as it relates to the Diocesan and local Church. This understanding must center on informing people about the services provided by the Diocesan offices and how those services benefit people in each parish. An important tool is the annual special CSA issue of *Faith Magazine*. This magazine shows how lives have been enriched through the Diocesan ministries & services supported by the CSA.
- **STRIVE FOR HIGH PARTICIPATION** - Stress participation by pointing out that every person is asked to respond to the appeal. It is important that everyone is encouraged to donate something. High participation levels usually mean very successful appeals. **A primary objective is to give every member numerous opportunities to make a gift. Commitment Sunday should not be the only time you ask people to give to the CSA.**
- **ASK PEOPLE TO GIVE** - This may seem elementary, but many campaigns fail because potential donors are not asked to give; they are asked in a weak way or asked only once. Don't be afraid to say clearly and often, "Please give to the 2010 Catholic Services Appeal."
- **ENCOURAGE PLEDGING INSTEAD OF ONE-TIME GIFTS** - As you promote the appeal, ask each family in the parish to offer a generous and sacrificial ten-month pledge. A significant number of families already pledge, but those that have not should be encouraged to consider this method.
- **FOLLOW-UP, FOLLOW-UP, FOLLOW-UP** - Successful appeals include follow-up components designed to help reach a high level of participation. Continue to provide opportunities for parishioners to give. Identify previous donors who have yet to give this year and follow up with them. Don't give up too quickly. Some suggestions for follow-up can be found on pages 25-28. Additional sample follow-up letters will be made available to all parishes at a later time.
- **SHARE THE PROGRESS OF THE CAMPAIGN WITH PARISHIONERS** - Let parishioners see how the parish is doing. When sharing results, provide amount pledged, amount collected and the number of donors. Keep encouraging the goal of 100% participation. Don't just publish results around the time of the appeal. Keep parishioners updated all year.
- **GRATITUDE** - We cannot say thank you enough to those who do support the CSA. Look for opportunities to thank them again and again. A good time to thank them would be after a parish project funded by the CSA is completed. Remember that the success of every future appeal depends on this simple yet powerful gesture.
- **REMINDERS** – Frequently let parishioners know that money raised above your parish goal stays in the parish. It will be used for special parish projects.

## OTHER THINGS TO CONSIDER WHEN PREPARING FOR A SUCCESSFUL CAMPAIGN

1. **General Solicitation** – You decide the method of solicitation which you feel will be most successful in your parish. The most commonly used methods are:
  - In-Pew Envelopes. **This is the preferred solicitation method that will produce the best result.** If you have used this method previously, consider the spiritual approach involving prayer, fasting and almsgiving.
  - Direct Mail and/or Home Visitation for distribution of pledge cards
  - Phone Solicitation. Have a team of callers call all parishioners to personally ask for their pledge.
  - Worker Stations near the Church for distribution of pledge cards following Mass.
  - Combinations of the above.
  
2. **Segmentation** – Consider making a different request of your parishioners depending on whether or not they have given to the appeal before. Past donors should be approached differently and should receive a personalized letter prior to Commitment Sunday. This can be sent whether your parish does an in-pew approach or direct mail. Other letters can be sent to those who have given before but have not done so recently. Another letter should be sent to those who have never given. In order to ensure you get enough support to reach your goal, everyone in the parish should in one way or another be contacted about the CSA. More specifics for using a segmented approach can be found on page 21 of this handbook. Sample letters for segmenting can be found in the back.
  
3. **Payment Reminders** – The Diocese will coordinate the pledge redemption system. Gifts will be made to the parish, not to the Diocese. Parishes that choose not to send out reminders and/or use monthly envelopes included with the regular offertory envelopes need to do all they can to ensure that pledges are fulfilled. *We do not* recommend solely using monthly envelopes for pledge fulfillment. Parishioners will have the option to receive reminders by e-mail. We will provide the option to select how often reminders will be sent. **Parishioners can choose to have reminders sent monthly, every other month or twice (June and December) during the ten month pledge period.** This is the case for both regular mail and e-mail reminders.
  
4. **Campaign Materials:**

Leadership Handbook	It is recommended that each parish has three copies--one for the pastor, one for a key volunteer and one for the parish secretary—extra copies are available upon request.
Pledge Cards	The card design will be the same as the past several years. They will be arranged in alphabetic order as in the past and mailed to parishes that requested them. These are for parishes who utilize a mailing or worker station method of appeal.
Posters	Display in high visibility areas – Church foyer, parish hall, Church and school office. Put posters up the middle of January. They should be left up through the end of March.
Pledge Envelopes	Used with in-pew method and with follow-up mailings.
Payment Reminders	First pledge reminders will be mailed shortly after March 17th.

Faith Magazine	This will be mailed about February 1st. It is a vital communication vehicle used to promote the CSA. The articles in the magazine will show how people from all regions of the Diocese have benefited from services funded through the CSA.
Bulletin/Pulpit Announcements	Suggested announcements have been created to be used specifically during the appeal. Others are to be used monthly throughout the year.
Sample Lay Witness	It can be challenging for a lay person to speak at Mass. The samples provided on pages 48-50 of this handbook will share some suggestions for effective lay witnesses.
Sample Letters	Different appeal letters, follow-up letters and a thank you letter have been drafted for your convenience.
Homily Ideas	For use on either Promotion Sunday, February 7 <sup>th</sup> and/or Commitment Sunday, February 14 <sup>th</sup> .

5. **Promotional Techniques that Work:**

- Make sure that you communicate to your parishioners several weeks prior to Commitment Sunday that the appeal will be taking place.
- Utilize local lay witnessing from a parishioner who has directly benefited from a Diocesan service. The best way to promote the appeal is to have a person in the parish speak positively about his or her experience with a Diocesan service or ministry.
- Your pastor speaking positively about the appeal from the pulpit. This can be done on Commitment Sunday by including comments after the homily.
- Use bulletin announcements around the time of the appeal and throughout the year
- Each week, report how many dollars are needed to reach the donor goal and parish dollar goal.

6. **Snow Birds** – Some senior parishioners spend the winter months in the south. Please be sure to use the alternate address in PDS for these parishioners so they continue to receive *Faith Magazine* and CSA related mailings.

7. **Have a compelling “parish project” as part of the case for the appeal** – The parish case shows how the funds raised over the goal will be used. What this is should be simply and accurately stated before the Appeal and fulfilled as stated, once the money is raised. However, don’t exclusively emphasize the parish case. In the long run, we are all hurt if the parish emphasizes its own case and does not mention the Diocesan services in any way. Your parishioners may continue to have negative feeling towards the Diocesan church if they never get to hear positive information regarding the work of the Diocese. Both cases should be shared.

# 2010



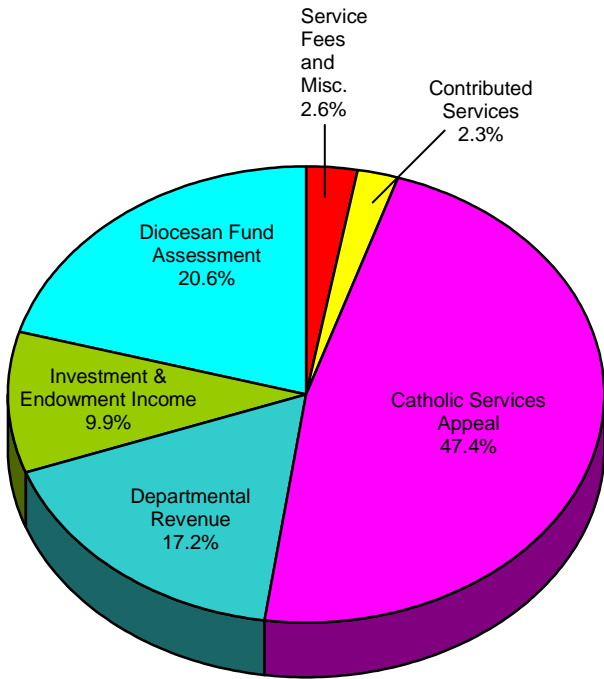
## CATHOLIC SERVICES APPEAL CHECK LIST AND TIMELINE

<u>DATE</u>	<u>ITEM</u>	<u>PARISH ACTION</u>	<u>COMPLETED</u>
Friday, January 15	Lay Witness Speakers	Have identified a person(s) to give a lay witness and provided him/her with the sample witnesses and other necessary information to prepare for the witness.	<input type="checkbox"/>
Sundays, Jan 24, Jan 31	Announcement Sundays	It is a good idea to let parishioners know that the CSA will be taking place soon and that a mailing will be arriving the beginning of Feb. It is recommended that advance commitments from previous donors are sought during this time.	<input type="checkbox"/>
Sunday, February 7	Promotion Sunday	Information is shared regarding the Appeal via numerous means.	<input type="checkbox"/>
Sunday, February 14	Commitment Sunday	People are asked to make a commitment to the CSA.	<input type="checkbox"/>
Sunday, February 21	Follow-up Sunday	Continue to mention CSA at all masses.	<input type="checkbox"/>
Sunday, February 28	Continue Follow-up	Continue to mention CSA at all masses.	<input type="checkbox"/>
Wednesday, March 17	First Report	First report of pledges and gifts should be exported to the Diocese via PDS. (See page 36 for calendar of CSA export deadlines.)	<input type="checkbox"/>
Monday, April 12	Thank You	Pastor letter--thank all who pledged/donated (A thank you will be sent in June from Bishop Trautman to all those who pledged/donated.)	<input type="checkbox"/>
Monday, June 14	Thank You	Pastor letter--thank all who pledged/donated Send letters to those who were not sent a thank you letter in April	<input type="checkbox"/>

# Diocese of Erie – Budget and CSA Statistics

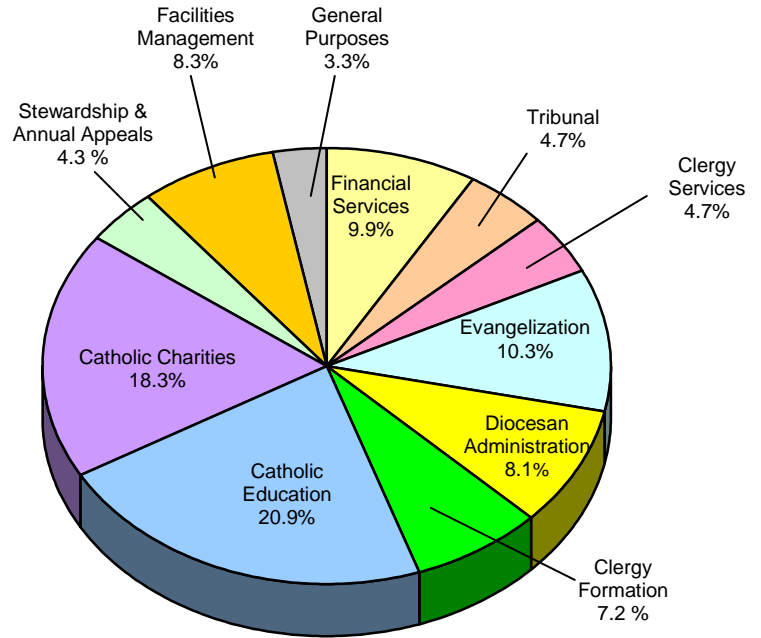
Total Projected 2010 Income

\$ 7,597,846



Total Projected 2010 Expenditures:

\$ 7,594,949



**The Campaign Goal for 2010 is \$3.687 Million**

In 2009 Donors Contributed	\$6.03 Million
Number of Donors	22,500
Amount Retained by Parishes for "Parish Projects"	\$2.38 Million

## CSA/DSA HISTORY SINCE 2000

YEAR	GOAL	PLEGGED	% OF GOAL	NUMBER OF GIFTS	AVG GIFT	\$ RETAINED BY PARISHES
2000	\$3,324,770	\$5,378,002	162%	28,296	\$190.06	\$2,053,232
2001	\$3,385,322	\$5,251,351	155%	25,208	\$208.32	\$1,866,019
2002	<b>No Appeal held</b>	<b>because of</b>	<b>Capital</b>	<b>Campaign</b>		
2003	<b>No Appeal held</b>	<b>because of</b>	<b>Capital</b>	<b>Campaign</b>		
2004	\$3,558,858	\$3,427,653	96%	14,707	\$233.06	\$332,514
2005	\$3,555,000	\$4,532,760	128%	19,983	\$226.83	\$1,239,671
2006	\$3,570,000	\$5,358,570	150%	21,226	\$252.22	\$1,885,476
2007	\$3,570,000	\$5,860,650	162%	21,510	\$269.24	\$2,270,350
2008	\$3,650,000	\$5,887,631	160%	21,551	\$271.40	\$2,144,850
2009	\$3,687,000	\$6,032,000	163%	22,500	\$267.00	\$2,380,229