



## ROLE OF THE PASTOR

Having a successful Catholic Services Appeal each year is dependent upon the positive and active leadership of the pastor. No effort within a parish can succeed without the pastor's leadership, involvement and support. There is a real spirituality to giving, and the pastor's witness to God's people will influence whether they are open to support His Church. It is you who must share the spirituality of giving. Additionally, it is important to explain each year why the CSA is conducted. As part of this, the pastor needs to be the primary person to personally ask parishioners to share their gifts in support of the 2010 CSA.

### The Pastor's Duties Include:

1. Plan – Plan out the process for conducting the appeal. This includes setting the overall parish goal (which should include some parish project). There are a number of ways to conduct the appeal, select a process and ensure that you keep to the timetable.
2. Select the right volunteers to assist with the CSA. Be sure to offer your support and encouragement to them.
3. Utilize prepared campaign materials - Lay Witnesses, posters, bulletin inserts, Prayers of the Faithful and Homily suggestions. **Also, encourage parishioners to read the special CSA issue of *Faith Magazine*.**
4. Speak supportively of the CSA from the pulpit. **Your personal endorsement is the single most important part of a successful parish campaign.**
5. Make sure you clearly ask people to give. This may seem obvious, but the pastor needs to make sure to say "Please give to the 2010 Catholic Services Appeal."
6. Encourage parishioners to make a pledge gift as opposed to a one time gift.
7. **Make sure that you conduct follow-up efforts.** Not all gifts will come as a result of activities and information shared prior to Commitment Sunday. Your goal is to contact all parishioners, preferably more than once. Follow-up mailings and phone calling are proven follow-up methods.
8. Make a pledge early (prior to Commitment Sunday) and let parishioners know you have made a gift to the appeal.



## ROLE OF PARISH VOLUNTEERS

Your CSA Volunteers are an important part of this essential diocesan/parish effort. These volunteers have a number of roles and responsibilities as the Appeal is conducted in their parish.

### Lay Volunteer duties include:

1. Assist the pastor in conducting any parish level leadership and worker meetings.
2. Assist in recruiting a sufficient number of parish workers.
3. Promote support for the Appeal among all parishioners.
4. Give a lay witness talk about their experience with a Diocesan service or ministry.
5. Familiarize him/her with the services and ministries funded by the CSA. Take time to thoroughly read the special CSA issue of *Faith Magazine*.
6. Maintain communication with the Diocesan Annual Appeals Office. Never hesitate to ask for additional materials or assistance.
7. Supervise the assignment of all pledge cards if your parish is using advance gift or home visitation methods of solicitation. Be sure to keep pledge cards until the end of the appeal.
8. Coordinate the work done by other members of the leadership team.
9. Be available to assist on Appeal Weekend - Commitment Sunday, February 14<sup>th</sup>.
10. Make your own CSA pledge early in the campaign.

## **Suggested Additional Volunteer Leadership**

### **Follow-up Chairperson will:**

1. Attend any parish-level worker meetings.
2. Be familiar with the printed campaign materials.
3. Recruit a committee to assist in contacting parishioners who did not complete a pledge card or pledge envelope on Commitment Sunday. Contacting them in some way is recommended. This can be done by letters, phone calls or personal visits.
4. Send out follow-up letters, (Sample follow-up letters will be provided to you at a later time). You can also contact the Diocesan Annual Appeals office for assistance with follow-up.
5. Return as many follow-up results as soon as possible to the Audit Chairperson, preferably before the 15<sup>th</sup> of each month. Those making pledges as a result of follow-up that are posted after the deadline each month won't receive their first reminder until the following month.
6. Conduct additional follow-up mailings as needed. Determine those in the parish who have given in the past but have not yet given this year and send letters to them. Also, send letters to parishioners who have never given to the CSA with the hopes of receiving some one-time gifts.
7. Send letters out in September to those who pledged but have not made any payment of their pledge.
8. Make a CSA pledge early in the campaign.

### **The Audit Chairperson will:**

1. Provide assistance in organizing the parish campaign effort.
2. Attend any parish-level worker meetings.
3. Recruit a sufficient number of competent persons to assist in receiving the worker returns.
4. Supervise worker returns to confirm that all pledges, cash & checks are in proper balance and account for all pledge cards.
5. Pay special attention to pages 36-39 of the handbook which describes how to transmit CSA results to the Diocese.
6. Make a CSA pledge early in the campaign.



The formula used to determine the taxable income and individual parish goals for the Appeal is as follows. Beginning with the income reported for the most recent fiscal year, interest and dividend income as well as net parish activity income will no longer be factors in the formula. While those sources of income are significant in certain parishes, it was felt that they are not indicative of a parish's potential to elicit support for the Appeal. The goals will continue to be based upon a three-year average of the taxable income of each parish. The revised income calculation, which contains fewer elements, will utilize the amounts reported in the following accounts:

	Offertory Income
less,	80% of Elementary School Subsidy
less,	80% x Secondary School Subsidy
less,	70% x Religious Education Expenses
less,	Standard Deduction of \$2,500 for all parishes
equals,	Parish Taxable Income.

This formula is the basis upon which the \$3.687 million total goal is pro-rated and the individual amounts for each parish are determined. The goals for each parish and the amount on which they were based were provided in the December 14, 2009 Information Bulletin. Each parish is expected to meet the full amount of its goal for the funding of Diocesan Services and Ministries. Any amount raised in excess of goal remains with the parish for its own project or local needs.

While some parishes may find it convenient to pay on a more frequent basis, we will again bill the Catholic Services Appeal quota in four installments per the following schedule:

- 25% - Due April 30, 2010
- 25% - Due June 30, 2010
- 25% - Due September 30, 2010
- 25% - Due December 31, 2010

## HOW MUCH SHOULD I GIVE?

### PLEDGES ARE THE KEY TO SUCCESS CONSIDER A PLEDGE IN 2010

#### THE PASTOR AND CSA VOLUNTEERS SHOULD ASK EVERYONE TO CONSIDER MAKING A PLEDGE

Making a pledge enables you to increase your generosity with payments spread out over a longer period of time. Pledges can be paid in ten monthly installments. Pledging, even just a small amount each month, can allow people to give more than just a one time gift. A pledge is a convenient way to increase your giving to the appeal, but it is not like a bill. A pledge is not something that you would be legally bound to pay if for some reason you couldn't. No one should be afraid of pledging for this reason. If you make a pledge, you are simply making a good faith gesture to pay a given amount to support the services provided to the people of the Diocese of Erie.

<b>WITH MY PLEDGE I GIVE</b>	<b>PLUS EACH MONTH FOR THE REST OF THIS YEAR</b>	<b>=MY TOTAL GIFT TO MY LARGER FAMILY</b>
\$ _____	\$ _____	\$ _____
\$ 500	\$ 500	\$ 5000
\$ 250	\$ 250	\$ 2500
\$ 100	\$ 100	\$ 1000
\$ 75	\$ 75	\$ 750
\$ 50	\$ 50	\$ 500
\$ 40	\$ 40	\$ 400
\$ 25	\$ 25	\$ 250
\$ 10	\$ 10	\$ 100
\$ _____	\$ _____	\$ _____

#### **GIFTS OF STOCK CAN BE ACCEPTED**

An excellent way to contribute to the CSA and realize potential tax savings is to give stock that has appreciated in value and that you have held for more than one year. You are entitled to charitable income-tax deduction for the fair market value of the stock on the day that it is given. You also avoid paying capital gains tax on the increase in value.

If you have a donor who would like more information on this type of gift, please contact Joseph Hoag, Director of Annual Appeals, at 800-374-3723 ext. 192 or locally at 824-1192, or via e-mail at [jhoag@eriercd.org](mailto:jhoag@eriercd.org).

#### **EFT AND CREDIT CARD GIFTS**

Many people enjoy the convenience of using electronic fund transfer or credit cards to make a gift. If your parish has the ability to accept and process these types of gifts, we encourage you to offer these options and publicize their availability.