

Written Resources on Successful Grand Annual Practices

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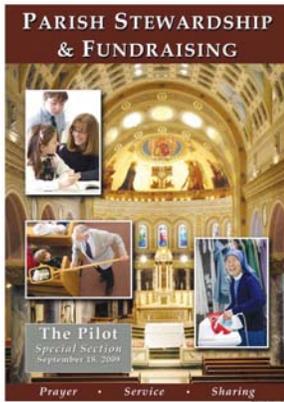
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- Stewardship in Difficult Economic Times (DeJesus)
- 7 Characteristics of a Strong Stewardship Parish (Cusick)
- Stewardship: A Business Manager's Perspective (Lewis)
- Stewardship Beyond the Pews (Potrikus)

Grand Annuals

- Ten Successful Practices for Parish Grand Annuals (Regele)
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Electronic Giving

- Parishes and Parishioners Win with Electronic Offertory (Landry)
- Best Practices for Enrolling Parishioners in Electronic Giving (Walsh)

Offertory Enhancement

- Basic Steps to Enhance Parish Offertory Collections (Poplava)
- Parish Life Begins with Engagement and is Sustained through Commitment (Gould)
- Offertory Envelope Best Practices (Landry)
- Best Ways to Support the Parish's Offertory (Landry)
- The Parish Offertory: 10 Ways to Improve Giving in Your Parish (Cunneen)

Planned Giving

- Bequests are Furthering our Church's Mission (Ely)
- 8 Ways to Encourage Bequests (Ely)
- Catholic Foundation Announces New Legacy Society (Ely)
- Why Parishes Should Promote Bequest Gifts (Ely)

Capital Campaigns

- A Parish Capital Campaign in this Economy? (Blain)
- Why a Parish Campaign Makes Sense in this Economy (Furey)
- Capital Campaigns: A long-term investment you can start today (Patterson)
- Parish Capital Campaigns Work...Yes, Even in this Economy!! (Lynch)
- Campaigns Are Different Today - Embrace These Changes At Your Parish (Nevins)

Parish Excellence

- Increasing Parishioner Engagement & Mass Attendance (Landry)
- Utilizing Bulletins to Grow Parishioner Contributions (Gull)

2008 Special Issue

Stewardship

- Eight Things That Parishes Can Do To Advance Stewardship (Zech)
- Imagining Abundance: The transformative potential of Catholic fundraising (Robinson)
- Stewardship helps us to know and love God (Sonni)
- Stewardship: The Why, The How, and The What to Expect (Sampson)

Electronic Giving

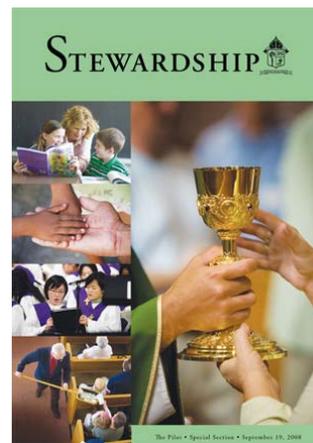
- Parish Giving Moves Electronic (Walsh)
- Top Mistakes Parishes Make with Electronic Offertory (Dockery)

Planned Giving

- Gifts of Appreciated Securities (Ely)
- The Importance of Writing a Will (Ely)

Parish Excellence

- Five Parish Fundraising Fundamentals (Landry)
- Parish Annual Reports Provide Accountability to All (Gibson)
- Parishioner generosity exceeds \$166 million annually (McCabe)
- Improving Parish Finances (Wilson)



All articles are available electronically at
www.ParishFundraisingBlog.com

Ten Successful Practices for Parish Grand Annuals

By Tim Regele

Grand Annuals are critical to the funding of the mission of a majority of the parishes in the Archdiocese of Boston.

This summer, Scot Landry and I had the privilege of speaking with nine pastors of parishes with the largest and/or fastest growing grand annuals in the Archdiocese. It was interesting to learn that there are many different approaches to Grand Annual “success.” Although each parish is unique and differs in its approach in some ways, there are commonalities as well; most notable is that successful Grand Annuals are run as “campaigns” instead of “collections” and involve a letter to all registered households following the release of a parish annual report.

These pastor interviews suggest ten tactics that have been shown to enhance parishes’ Grand Annual campaigns. Many of these strategies serve not only to enhance Grand Annual “success” but also to strengthen parish life as a whole.

To bring the tactics to life and to provide practical testament of their effectiveness, we have included quotes from our Pastor interviews. In order to achieve a thriving Grand Annual, a parish must do more than become an effective fundraiser; it must also grow and enliven the spirituality and commitment of its faithful.

(1) Send a personalized letter to all families. Hand-signed letters, with a brief note, increase success in the Grand Annual and improve the connection parishioners feel with the parish. Include a pledge card, return envelope, and a budget (or reference to the annual report). Every pastor we interviewed implemented this practice and noted the letters as being essential to their success. Father Jim Ronan, pastor of St. Mary-St. Catherine of Siena Parish in Charlestown, states that an “initiative that contributed to our growth in our Grand Annual was the increased personalization of the letters. Last year I began hand-signing each letter and including personal notes.”

(2) Personalize the requested gift amount based on parishioners’ previous support. As with the letters, personalization of pledge cards increases success. On the pledge cards, state what the family gave in previous years and ask them to prayerfully consider an increase. If you think a “general norm” is more appropriate for your parish, ensure the ask amount is on the high-end of what parishioners consider appropriate, noting that “some can do more; others can afford less; please give according to your means/situation”. Father Frank Silva, pastor of Corpus Christi–St. Bernard Parish in Newton, observes that “personalized pledge cards help to increase gift amounts, as they state the previous year’s gift and suggest small increased [gift] amounts to each family. I think that this is received as a much more personal approach and is thus more effective...Parishioners see that we are concerned with what they’re able to give and they see that there is a high-level of professionalism to the process.”

(3) Publish an annual report about one month prior to the grand annual. Annual reports build new bonds of trust from enhanced transparency and accountability. Go beyond the finances, detailing parish ministries and tying the report to the upcoming grand annual. Mail the report to all registered households or make it available in the church/bulletin. Father Richard Messina, pastor of St. Mary Parish in Winchester shares that “the financial report is important [to the success of the grand annual]. Our report goes beyond just listing the parish finances, as we provide descriptions of ministries and various parish activities also.”

(4) Send follow-up letters out 1 and 2 months after the campaign launch to parishioners who have yet to give.

Follow-up or reminder letters are essential to all fundraising campaigns. Be sure to personalize these follow-up letters too, maintaining a close connection to parishioners. Father Frank Silva, pastor of Corpus Christi–St. Bernard Parish in Newton, notes that “usually about a month after the first letter goes out, Letter Concepts sends out a follow-up letter on our behalf. This second letter is much briefer and more of a reminder, but it seems as though we receive as many gifts from this second solicitation as we do from the first letter.”

(5) State the GA need and goal clearly and show visually how previous grand annuals have improved the parish. Parishioners must be informed of how important the grand annual is to the parish’s ability to fulfill its mission and continue its services. Reinforce the need/goal in church, in the bulletin, in the solicitation letters, and in the thank you letters. State the goal for total dollars and participation (100% of parish families). Images are very effective in showing what previous grand annual proceeds were able to accomplish for the parish. Father Richard Fitzgerald, pastor of St. Paul Parish in Wellesley explains that it is important to “justify the need. There are always needs, but you must to give your parishioners sufficient info to justify the need as something they want to support. Mention real needs/projects that will have to get done this year.”

(6) Allow parishioners to pledge and then make multiple payments. When people are given the option to stretch their desired gift over a period of time, they are often able and encouraged to give more. Father Michael Lawlor, pastor of St. Joseph Parish in Needham recommends: “providing parishioners the option to make multiple payments toward their Grand Annual pledge. Every parish is different, but at my previous parish in Lynnfield, instituting the option of multiple (i.e. three) payments significantly increased our Grand Annual.”

(7) Thank parishioners immediately and frequently for their grand annual gifts. Everyone likes to feel appreciated. After receiving a gift, send personalized thank you notes quickly. This shows that the parish takes the campaign seriously, is professional, and is thankful. Remember to continually express appreciation – in spoken and written word - throughout the entire campaign. Father Michael Steele, pastor of Our Lady Star of the Sea Parish in Marblehead comments: “we thank people right away, sending out the thank you note immediately. I hand sign these thank you letters. Parishioners appreciate the quick thank you. If parishioners pledge and give more than one gift, they will get a thank you card each time.”

(8) Employ the services of a third-party firm to execute the grand annual. Invest in success. Employing third-party firms provides a great return on your parish’s investment. In addition to providing invaluable experience and knowledge, these firms take the burden off of parish staff, handling the work of the mailing, gift processing, reporting, database updating, and follow-up letters. Father Michael Guarino, pastor of St. Anthony of Padua Parish in Revere remarks: “We use Letter Concepts for our Grand Annual. We’ve greatly increased the amount we raise in our Grand Annual for a relatively small fee. [With Letter Concepts working with us] we don’t have to do much...I would absolutely recommend that pastors get in touch with one of the parish fundraising companies. They know how to help a parish increase its Grand Annual and offertory.”

(9) Communicate the parish’s overall goals/priorities and demonstrate aspiration for excellence. Success breeds success. People want to support thriving organizations with high standards and great results. Communicate a few goals that focus on growing the parish and emphasize parish successes. Investments in spirituality and faith formation - religious education, family liturgies, schools, etc. – typically generate increased support. Father George Evans, pastor of St. Julia Parish in Weston states that “we work really hard on issues of pastoral life and put a lot of effort into providing spiritual nourishment to our parishioners. I trust that they appreciate that we do a lot in our parish. Our activity helps them to respond generously when we make appeals.”

(10) Reinforce the campaign with frequent in-church and bulletin mentions. Reference the Grand Annual weekly in-church in some way, thanking people for their gifts and encouraging total participation. Report both total dollars contributed and total number of gifts received in each bulletin and reinforce that you hope EVERY parish family contributes in some way. Father James Rafferty, pastor of St. Paul Parish in Hingham explains that “a couple of days following the mailing, a member of our parish finance council gives a prepared talk about the Grand Annual at all masses. I also mention the Grand Annual in my preaching, but always keep it gospel-based. Similarly, a number of times each fall, I mention the Grand Annual in my pastoral letter in the bulletin. Every week there is an announcement in the bulletin on how much we have raised to date.”

To read transcripts of these pastor interviews and to view additional resources to help your grand annual, I encourage you to visit www.ParishFundraisingBlog.com or to call us in The Catholic Foundation.

Tim Regele is Operations Associate for The Catholic Foundation. He is a frequent contributor to ParishFundraisingBlog.com.

This article originally appeared in a special "Parish Stewardship & Fundraising" section of [The Pilot](#) on September 18, 2009

Best Practices for Conducting a Grand Annual Campaign

By Thomas M. Wilson

For the past few decades many Catholic parishes in the Archdiocese of Boston have conducted Grand Annual Campaigns. During the past fiscal year, in fact, 215 of the Archdiocese's 291 parishes undertook these campaigns – about 74% of all RCAB parishes.

Typically, the parish Grand Annual Campaign involves a request for a larger annual gift to help bridge the budget gap created by a low and volatile offertory collection during the summer season and during bad weather. While most parishes undertake the grand annual to help offset operating budget shortfalls, others undertake it to fund capital repairs and improvement projects to parish buildings, equipment and parking lots.

When Letter Concepts assists parishes with their Grand Annual campaign, we encourage them to undertake the following steps:

1. Consult with the parish finance committee and determine a realistic target goal.
2. Clearly define how the funds from the Grand Annual will be used.
3. Send an initial request letter and a follow-up letter to those that haven't responded to the first letter. The follow-up letter should be sent four weeks after the first request letter is mailed.
4. Use personalized letters, intention cards and envelopes.
5. Track contributors each year - Inform parishioners of their prior commitment to the Grand Annual campaign. Note: generic, non-personalized, request amounts produce generic results.
6. Send a hand-signed thank you letter or card promptly to all respondents.
7. Print the return address of the parish on the return envelope for those that do not attend Mass regularly. This may be the one chance for these families to make an annual financial commitment to their registered parish.
8. Let the request letters do their work. As a wrap-up mechanism, place a Grand Annual envelope in your offertory envelope packet two weekends after the follow-up letter.

By employing these simple steps each year, your parish will sustain and even increase the number of contributors and amount raised in the Grand Annual campaign.

If you are a member of your parish finance committee or parish council, I encourage you discuss this article at your next meeting and how your parish could benefit. Working together to improve parish fundraising and finances, we can strengthen the Church's ability to carry on the mission that Christ has entrusted to us.

Tom Wilson is Managing Partner of Letter Concepts, a leader in Grand Annual Collections and Increase Weekly Giving Programs. For more information, visit www.letterconcepts.com or email tomw@letterconcepts.com.

This article originally appeared in a special "Parish Stewardship & Fundraising" section of [The Pilot](#) on September 18, 2009

Successful Grand Annual Practices (Overview)

Scot Landry and Tim Regele from the Catholic Foundation recently conducted 9 interviews with pastors in the Archdiocese of Boston that run some of the largest and/or fast-growing grand annual campaigns. We are grateful for the willingness of these 9 pastors to share how they implement their Grand Annual campaigns and explain why they think they have been successful.

Grand Annuals are critical to the funding of the mission of a majority of the parishes in the Archdiocese of Boston. In most parishes, they are “campaigns” instead of “collections.” While there are a lot of different approaches, the largest grand annuals in the RCAB (and those that are fastest growing) all involve a letter to all registered households following the release of a parish annual report.

The following 10 practices are recommended by pastors and other fundraising consultants as key to Grand Annual success.

1. Send a personalized letter to all families.
2. Personalize the requested gift amount based on their previous support.
3. Publish an annual report about one month prior to the grand annual.
4. Send follow-up letters out 1 and 2 months after the campaign launch to parishioners who have yet to give.
5. State the GA need and goal clearly and show visually how previous grand annuals have improved the parish.
6. Allow people to pledge and then make multiple payments.
7. Thank parishioners immediately and frequently for their grand annual gifts.
8. Employ the services of a third-party firm to execute the grand annual.
9. Communicate the parish's overall goals/priorities and demonstrate aspiration for excellence.
10. Reinforce the campaign with frequent in-church and bulletin mentions.

Expanding on these 10 practices, there are 2 documents:

- **Successful Grand Annual Practices (Outline)** - several bullets to expand on each of the 10 practices.
- **Successful Grand Annual Practices (Outline with Quotes from Pastors)** - a longer version that includes detailed quotes from pastors that support each of the 10 practices.

Also, on ParishFundraisingBlog.org, we have posted transcripts of each of these pastor interviews. We recommend you read the transcripts in their entirety to see whether one of these varying approaches will work best for your parish.

Fr. George Evans, St. Julia, Weston
Fr. Richard Fitzgerald, St. Paul, Wellesley
Fr. Michael Guarino, St. Anthony of Padua, Revere
Fr. Michael Lawlor, St. Joseph, Needham
Fr. Richard Messina, St. Mary, Winchester

Fr. James Ronan, St. Mary-St. Catherine, Charlestown
Fr. Frank Silva, Corpus Christi-St. Bernard, Newton
Fr. James Rafferty, St. Paul, Hingham
Fr. Michael Steele, Our Lady Star of the Sea, Marblehead

We have also provided 2 PDFs below of Grand Annual (and annual report) materials for your reference.

- **Corpus Christi-St. Bernard, Newton**
- **A simple parish template (anonymized)**

Successful Grand Annual Practices (Outline)

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The following 10 steps are recommended by pastors and other fundraising consultants as key to Grand Annual success.

1. Send a personalized letter to all families.

- Handsigned letters, with a brief note, increases success in the Grand Annual and improves the connection with the parish.
- Include a pledge card, return envelope and a budget (or reference to the annual report that was recently shared).
- Note: Broadcasting the message only from the pulpit, in the bulletin, and via offertory envelopes allows will not produce the same response as a personalized letter.
- To ensure a complete mailing list, update the database prior to the campaign. Early September might be a good time, so you can include all the school & religious education families, as well as new families moving into the parish.
- If you mail the annual report, use it as an opportunity to identify those that didn't receive it, and add them to the database, before you mail the grand annual letters.

2. Personalize the requested gift amount based on their previous support.

- State what was given by the family in previous years on the pledge card.
- Ask them to prayerfully consider whether they may be able to increase it this year. Ask them to be as generous as their means allow.
- If you think a “general norm” would be appropriate for your parish, ensure the ask amount is on the high-end of what parishioners consider appropriate and temper it with “some can do more; others can afford less; please give according to your means/situation”.

3. Publish an annual report about one month prior to the grand annual.

- Detail both ministries and finances – the length and depth can vary according to the parish.
- Introduce the goal for the upcoming grand annual in the launch/ mailing/ discussion of the annual report.
- Have a lay person provide an in-church report and mention the upcoming grand annual.
- Either have copies available in church/ bulletin or mail to all registered households.

4. Send follow-up letters out 1 and 2 months after the campaign launch to parishioners who have yet to give.

- Followup / Reminder letters are essential to all fundraising campaigns.
- Followup letters can be shorter than the initial letters. They can serve as a simple reminder to the parishioners.
- Personalization increases gifts and gift amounts in the followup letters too.

5. State the GA need and goal clearly and show visually how previous grand annuals have improved the parish.

- Explain how important the grand annual is to the parish's ability to fulfill its mission and continue its operations.
- State the goal for total dollars and participation (100% of parish families).
- If your offertory (+ rental income) covers the normal expenses, identify special projects for the GA campaign.
- Always show pictures of what last year's grand annual proceeds were able to accomplish for the parish.
- Reinforce the need/goal in church, in the bulletin, in the solicitation letters, and in the thank you letters.

6. Allow people to pledge and then make multiple payments.

- This allows people to stretch their desired gift over a period of time, often resulting in higher overall gifts.

7. Thank parishioners immediately and frequently for their grand annual gifts.

- After receiving a gift, send personalized thank you notes quickly. Great and quick thank yous show that the parish takes the campaign seriously, is professional, and is thankful.
- Regularly show appreciation as you begin the campaign (for last year's gifts and their overall generosity), as they give (personalized), and after the give (each time you mention the results/progress).

8. Employ the services of a third-party firm to execute the grand annual.

- This is a great return on your parish's investment.
- They have experience of what works across many parishes.
- They allow the easy personalization of the letters and the ask amounts (in the 2nd year of the campaign).
- They can check the accuracy of all the mailing information quickly.
- They handle the work of the mailing, gift processing, reports, database updates, and followup letters.

9. Communicate the parish's overall goals/priorities and demonstrate aspiration for excellence.

- People want to support "winning" organizations that will be around for a long time, so communicate the wins and improvements. Show in everything you do that you "strive for excellence." People want to support those with high-standards and great results.
- With your lay leaders/parish councils, pick a few goals that focus on growing the parish.
- Investments in excellent faith formation for the children (religious ed, family mass, schools) generates wide support, typically.

10. Reinforce the campaign with frequent in-church and bulletin mentions.

- Report both total contributions (dollars [\$] contributed) and total participation (# of gifts) in each bulletin to highlight participation. Participation goals are important. Reinforce that you hope EVERY parish family contributes in some way.
- If it's appropriate for your parish, list alphabetically the names of the families contributing (without gift amounts) in your bulletin.
- Reference the Grand Annual weekly in-church in some way, thanking people for their gifts and asking everyone to participate

Successful Grand Annual Practices (Outline with Quotes from Pastors)

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- Note: Broadcasting the message only from the pulpit, in the bulletin, and via offertory envelopes allows will not produce the same response as a personalized letter.
- To ensure a complete mailing list, update the database prior to the campaign. Early September might be a good time, so you can include all the school & religious education families, as well as new families moving into the parish.
- If you mail the annual report, use it as an opportunity to identify those that didn't receive it, and add them to the database, before you mail the grand annual letters.

Quotes from Interviews with Pastors

- **Father Jim Ronan, St. Mary-St. Catherine of Siena, Charlestown:** *An "initiative that contributed to our growth was increased personalization of the letters. Last year I began hand-signing each letter and including personal notes."*
- **Father Michael Lawlor, St. Joseph Needham:** *The most important step for a successful grand annual is for the pastor "to write a letter to each household and include with it a financial report. The letter should stress how the Grand Annual is necessary to continue the current services and not scare people into giving."*
- **Father James Rafferty, St. Paul Hingham:** *"In our Grand Annual mailing, we include a cover letter and a brief budget report detailing what came in last year and what it was spent for, along with a projected budget for projects that are ahead, and a remittance envelope for gifts. A couple of days following the*

mailing, a member of our parish finance council gives a prepared talk about the Grand Annual at all masses. I also mention the Grand Annual in my preaching, but always keep it gospel-based. Similarly, a couple of times each fall, I mention the GA in my pastoral letter in the bulletin. Every registered parishioner/family receives the Grand Annual mailing and we place copies in the back of the parish for those who want to give but are not registered.”

- **Father Richard Fitzgerald, St. Paul Wellesley:** We mail a grand annual packet to all registered households which “consists of an appeal letter including the upcoming year’s budget and any significant expense info, as well as a list of all the things done in the parish over the last five years and a remittance envelope. In my mind, it is important to include as much information as possible about what has happened in the parish – especially, any significant expenditures. I speak about the nature of the appeal - why it’s important - and also mention the budget and why we need the money. I specifically point to what projects will need to be undertaken in the next year.”

2. Personalize the requested gift amount based on their previous support.

- State what was given by the family in previous years on the pledge card.
- Ask them to prayerfully consider whether they may be able to increase it this year. Ask them to be as generous as their means allow.
- If you think a “general norm” would be appropriate for your parish, ensure the ask amount is on the high-end of what parishioners consider appropriate and temper it with “some can do more; others can afford less; please give according to your means/situation”.

Quotes from Interviews with Pastors

- **Father Frank Silva, Corpus Christi – St. Bernard, Newton:** “Personalized pledge cards help to increase gift amounts, as they state the previous year’s gift and suggest small increased [gift] amounts to each family. I think that this is received as a much more personal approach and is thus more effective. It shows that we recognize what people have given [in the past]. Parishioners see that we are concerned with what they’re able to give and they see that there is a high-level of professionalism to the process.”
- **Father Jim Ronan, St. Mary-St. Catherine of Siena, Charlestown:** We have focused “on increasing participation in the Grand Annual. In order to get as many parishioners involved as possible, we asked that each household contribute an amount equivalent to taking the family or friends out to dinner for one night. Since our parish is made up of some of the poorest families in Boston, and some very wealthy families, we hoped that this approach would allow and encourage everyone to give within their means. I think we were successful in this.”

3. Publish an annual report about one month prior to the grand annual.

- Detail both ministries and finances – the length and depth can vary according to the parish.
- Introduce the goal for the upcoming grand annual in the launch/ mailing/ discussion of the annual report.
- Have a lay person provide an in-church report and mention the upcoming grand annual.
- Either have copies available in church/ bulletin or mail to all registered households.

Quotes from Interviews with Pastors

- **Father Michael Lawlor, St. Joseph Needham:** The parish financial report is quite important to the success of the grand annual “as it allows people to see how the money is spent. For most parishes, I think it’s very helpful to share the annual report. Even if not everyone reads it, I think it’s important to have it there for parishioners.”
- **Father Richard Messina, St. Mary Winchester:** “The financial report is important [to the success of the grand annual]. It goes beyond just listing the parish finances, providing descriptions of ministries and various parish activities in addition to the numbers. Usually the report is a 2-4 page booklet.”
- **Father Frank Silva, Corpus Christi – St. Bernard, Newton:** “We make the report professional but haven’t been able to include pictures and graphs. It’s a very neat format. We specifically try to make people see that while finances are important, we also talk about the spiritual life of the parish and they say, as an aside, we need your contributions to make all this happen. The report is a folded 11”x17” sheet of paper, one side of financials and the other side with a narrative on parish life. We draft the content of the report in-house but send it to a printer to be professionally printed.”

4. Send follow-up letters out 1 and 2 months after the campaign launch to parishioners who have yet to give.

- Followup / Reminder letters are essential to all fundraising campaigns.
- Followup letters can be shorter than the initial letters. They can serve as a simple reminder to the parishioners.
- Personalization increases gifts and gift amounts in the followup letters too.

Quotes from Interviews with Pastors

- **Father Frank Silva, Corpus Christi – St. Bernard, Newton:** “Usually about a month after the first letter goes out, Letter Concepts sends out a follow-up letter. This second letter is much briefer and more of a reminder, but it seems as though we receive as many gifts from this second solicitation as we do from the first letter.”
- **Father Jim Ronan, St. Mary-St. Catherine of Siena, Charlestown:** “We send out a follow-up letter about four weeks after the start of the campaign in early November. Starting last year, we now personalize these letters as well.”
- **Father Richard Messina, St. Mary Winchester:** “Around November 15 we send out a second letter to parishioners who have not yet given, emphasizing that we haven’t heard from them and thanking them for “thinking of giving.”

5. State the GA need and goal clearly and show visually how previous grand annuals have improved the parish.

- Explain how important the grand annual is to the parish’s ability to fulfill its mission and continue its operations.
- State the goal for total dollars and participation (100% of parish families).
- If your offertory (+ rental income) covers the normal expenses, identify special projects for the GA campaign.
- Always show pictures of what last year’s grand annual proceeds were able to accomplish for the parish.
- Reinforce the need/goal in church, in the bulletin, in the solicitation letters, and in the thank you letters.

Quotes from Interviews with Pastors

- **Father Richard Fitzgerald, St. Paul Wellesley:** It is important to “justify the need. There are always needs, but you must to give your parishioners sufficient info to justify the need as something they want to support. Mention real needs/projects that will have to get done this year. I would also stress the importance of the Pastor’s talking about the Grand Annual directly and the needs of the parish, even if he is reluctant.”
- **Father Michael Steele, Our Lady Star of the Sea, Marblehead:** “We include photos to help visual learners see how we’ve invested their contributions. I think it is very important to inform parishioners as to where all the money is going in the parish so that they are encouraged to continue supporting our wonderful activities. Pictures drive the point home better than words.”
- **Father Jim Ronan, St. Mary-St. Catherine of Siena, Charlestown:** “We relate the Grand Annual to the annual financial report; we explain what the offertory/other collections have achieved towards our operating expenses, pointing to and explaining the shortfall, and then ask parishioners to help make up the difference with the Grand Annual so that we can balance the budget.”

6. Allow people to pledge and then make multiple payments.

- This allows people to stretch their desired gift over a period of time, often resulting in higher overall gifts.

Quotes from Interviews with Pastors

- **Father Michael Lawlor, St. Joseph Needham:** “I recommend providing parishioners the option to make multiple payments toward their Grand Annual pledge. Every parish is different, but at my previous parish in Lynnfield (St. Maria Goretti), instituting the option of multiple (3) payments significantly increased our Grand Annual.”

7. Thank parishioners immediately and frequently for their grand annual gifts.

- After receiving a gift, send personalized thank you notes quickly. Great and quick thank yous show that the parish takes the campaign seriously, is professional, and is thankful.
- Regularly show appreciation as you begin the campaign (for last year’s gifts and overall generosity), as parishioners give (with a personalized thank you), and after parishioners give (each time you mention the results/progress in church or in the bulletin).

Quotes from Interviews with Pastors

- **Father Michael Steele, Our Lady Star of the Sea, Marblehead:** “We thank people right away, sending out the thank you note immediately. I hand sign these thank you letters. Parishioners appreciate the quick thank you. If parishioners give more than one gift, they will get a thank you card each time.”
- **Father Richard Messina, St. Mary Winchester:** “Last year as soon as we received a gift, we sent out a thank you postcard and then later followed this postcard up with a thank you letter. This year we will send out a thank you letter right away. I sign every letter and often include a personal note.”

- **Father Michael Lawlor, St. Joseph Needham:** “We thank parishioners with a personal letter. I sign every thank you letter and include personal notes. This letter also covers the IRS tax requirements for their giving.”
- **Father James Rafferty, St. Paul Hingham:** “We thank donors by sending a personal letter. I sign every thank you letter and include personal notes to many parishioners. I also personally call those who give major gifts to offer sincere thanks.”

8. Employ the services of a third-party firm to execute the grand annual.

- This is a great return on your parish’s investment.
- They have experience of what works across many parishes.
- They allow the easy personalization of the letters and the ask amounts (in the 2nd year of the campaign).
- They can check the accuracy of all the mailing information quickly.
- They handle the work of the mailing, gift processing, reports, database updates, and followup letters.

Quotes from Interviews with Pastors

- **Father Frank Silva, Corpus Christi – St. Bernard, Newton:** “Most aspects of our Grand Annual are handled through the mail and I’ve found it to be extremely helpful to employ a third party firm. We use Letter Concepts. For the cost, it works and really does not tax the parish staff in the least bit. [The advantages of using a third-party firm are] first, you gain greatly from the third party firm’s experience and knowledge. Second, using an outside firm frees the parish staff from being caught up in trying to do all the mailing and other leg work. The pledge cards come in to our parish secretary and she faxes copies to Letter Concepts who handles everything - sending us the numbers/stats on incoming gifts, sending follow-up letters, managing our database, etc. Third, the firm is able to personalize the letters and pledge cards to each parishioner. Personalized pledge cards help to increase gift amounts, as they state the previous year’s gift and suggest small increase amounts to each family. I think that this is received as a much more personal approach and is thus more effective. I would argue that any parish could use a third party firm. It’s cost effective even if it looks expensive, because what you get in return more than balances out the cost. The accuracy that you can call for puts you at peace of mind - you are not duplicating letters or sending out wrong statements. One of the other great things about working with Letter Concepts is that they also send a thank you note, which is of course very important. They use a digital signature for my thank you letters and personally address them to the parishioners.”
- **Father Michael Guarino, St. Anthony of Padua, Revere:** “We use Letter Concepts for our Grand Annual. We’ve greatly increased the amount we raise in our Grand Annual for a relatively small fee. [With Letter Concepts working with us] we don’t have to do much. Our parish secretary makes copies of the pledge cards/payments as they come in and faxes them to Letter Concepts so they can handle it all – from thank you letters to updates to database maintenance. I would absolutely recommend that pastors get in touch with one of the parish fundraising companies. This is the work of these companies. They know what they’re doing. They know how to help a parish increase its Grand Annual and offertory. I would also advise the pastor to write an honest, down-to-earth letter; lay out the facts, hide nothing, and go from there. Letter Concepts has been great in drafting letters like this for us. If you stick to this down-to-earth approach, the parishioners come to expect the Grand Annual and take it as a responsibility.”

9. Communicate the parish’s overall goals/priorities and demonstrate aspiration for excellence.

- People want to support “winning” organizations that will be around for a long time, so communicate the wins and improvements. Show in everything you do that you “strive for excellence.” People want to support those with high-standards and great results.
- With your lay leaders/parish councils, pick a few goals that focus on growing the parish.
- Investments in excellent faith formation for the children (religious ed, family mass, schools) generates wide support, typically.

Quotes from Interviews with Pastors

- **Father George Evans, St. Julia Weston:** “We work really hard on issues of pastoral life and put a lot of effort into providing spiritual nourishment to our parishioners. I trust that they appreciate that we do a lot in our parish. Our activity helps them to respond generously when we make appeals.”
- **Father Jim Ronan, St. Mary-St. Catherine of Siena, Charlestown:** “I think that the most important thing to do is to continue reminding people of who we are as a parish and showing them where the money goes and how successful we are. There is a feeling in the parish that things are alive and parishioners want to contribute since so many good things are happening - beautiful liturgies with music, social ministry programs, food pantry programs, recovery programs, to name a few. Parishioners are more inclined to support a parish that is moving forward and responding to their needs. Once the investment is made in these initiatives, the money will follow.”

- **Father Michael Lawlor, St. Joseph Needham:** *“I think that our parishioners see all the good things that take place in our parish, for themselves and for their children, and are thankful. They realize that in order for these services to continue, they must support the parish; many do this through the Grand Annual. A parish must be alive, as ours is, because people will be more likely to give to something that’s vibrant. I have no problem speaking about money and I think that’s important to get parishioners involved as well.”*
- **Father Michael Steele, Our Lady Star of the Sea, Marblehead:** *“We’ve worked really hard to incorporate spirituality in our parish. We’ve brought in speakers, increased religious education, and began a family liturgy. The family liturgy greatly helped the Grand Annual – we’re getting a full church at these masses. First communions are up. Confirmations are up. Parents are not just dropping their kids off for CCD and leaving. Since we’ve moved CCD to Sunday, parents are staying on the parish campus, socializing, becoming more involved in the parish life. We’ve really invested in the spiritual life of the parish, making sure that people see the parish heading towards becoming more spiritually enriching and more alive. When we then go and ask people to invest in that continued growth, they are much more inclined to want to do so. The parish must continually be moving towards greater spirituality and revising its mission statement so that people are involved, invested, and renew their commitment to living the mission. It may take a couple of years to build, as it has for us, but it leads to a very successful parish.”*

10. Reinforce the campaign with frequent in-church and bulletin mentions.

- Report both total contributions (dollars [\$] contributed) and total participation (# of gifts) in each bulletin to highlight participation. Participation goals are important. Reinforce that you hope EVERY parish family contributes in some way.
- If it’s appropriate for your parish, list alphabetically the names of the families contributing (without gift amounts) in your bulletin.
- Reference the Grand Annual weekly in-church in some way, thanking people for their gifts and asking everyone to participate.

Quotes from Interviews with Pastors

- **Father James Rafferty, St. Paul Hingham:** *“A couple of days following the mailing, a member of our parish finance council gives a prepared talk about the Grand Annual at all masses. I also mention the Grand Annual in my preaching, but always keep it gospel-based. Similarly, a couple of times each fall, I mention the GA in my pastoral letter in the bulletin. Every registered parishioner/family receives the Grand Annual mailing and we place copies in the back of the parish for those who want to give but are not registered.”*
- **Father George Evans, St. Julia Weston:** *“I write a letter in the parish bulletin every week, so for two weeks around the time of the Grand Annual, I usually make about one third of this letter about the Grand Annual. In this I speak very honestly about the need for the Grand Annual. We also always have a section in the bulletin with statistics – offertory collection, special collections, Catholic Appeal – and during the Grand Annual campaign, we include the amount raised to date for the Grand Annual.”*
- **Father Frank Silva, Corpus Christi – St. Bernard, Newton:** *“At the beginning, we include a general description that the Grand Annual is under way – we mention the projects it will fund and the campaign’s goal. Then, each week while the Grand Annual is under way, we include a progress report - the number of contributors and dollars contributed.”*

Interview with Fr. Frank Silva on Grand Annuals - 8/27/2009

Fr. Frank J. Silva is pastor at Corpus Christi - St. Bernard Parish in Newton, MA. He was ordained in 1976.

From our data, it looks like you might have recently started a Grand Annual at your parish, is that correct?

Well, we are a merged parish that was formed in July of 2006. In the fall of 2006, we did not hold a Grand Annual campaign but we initiated one in the fall of 2007. I believe that they did hold Grand Annuals in the former [unmerged] parishes.

How do you launch your campaign?

We begin by mailing a four-page annual parish financial report in mid-September. The report consists of the parish's financial information from the previous fiscal year, a narrative on the state of the parish, and the parish's mission statement. Within a couple of weeks after that, we send out a mailing that launches the Grand Annual. On the weekend of the Grand Annual's launch, we announce the Grand Annual at Masses, referencing the financial report, thanking people for what they've done and encouraging them to consider what they've contributed and encouraging them to continue to give.

Most aspects of the Grand Annual are handled through the mail and I've found it to be extremely helpful to employ a third party firm. We use Letter Concepts. For the cost, it works and really does not tax the parish staff in the least bit.

What advice would you give to a pastor who might not see the benefits of using a third party firm for their Grand Annual?

I would say that you gain greatly from the third party firm's experience and knowledge.

Secondly, using an outside firm frees the parish staff from being caught up in trying to do all the mailing and other leg work. The pledge cards come in to our parish secretary and she faxes copies to Letter Concepts who handles everything - sending us the numbers/stats on incoming gifts, sending follow-up letters, managing our database, etc.

Another advantage of using Letter Concepts is that they're able to personalize the letters and pledge cards to each parishioner. Personalize pledge cards help to increase gift amounts, as they state the previous year's gift and suggest small increase amounts to each family. I think that this is received as a much more personal approach and is thus more effective.

How important do you think those personalized gift options are to increasing your support each year?

I think they are important because it shows that we recognize what people have given. Parishioners see that we are concerned with what they're able to give and they see that there is a high-level of professionalism to the process.

It's also important that each letter is personally addressed. I also think that it's important to stress in the letter the parish's goal and what the funds are intended to be used for.

What does the Grand Annual benefit (i.e. specific or general needs)?

We direct our Grand Annual money to specific projects that are above and beyond what the regular budget covers - capital improvements like the replacement of a boiler or the painting of the church. The Grand Annual is not for operational purposes but for capital expenditures.

Our offertory does not cover our entire operating budget, but our rental income helps cover what the offertory does not. The additional funds from the Grand Annual allow us to show people specific special projects that we can and should accomplish.

What does your annual parish financial report look like?

We make the report professional but haven't been able to include pictures and graphs. It's a very neat format. We specifically try to make people see that while finances are important, we also talk about the spiritual life of the parish and they say, as an aside, we need your contributions to make all this happen. The report is a folded 11"x17" sheet of paper, one side of financials and the other side with a narrative on parish life. We draft the content of the report in-house but send it to a printer to be professionally printed.

Is budgetary info included in the report?

Yes, the budget for the coming year is included in the financial report.

Does the Grand Annual letter include any financial information?

Not really. The letter just brings the fact of the Grand Annual to people's attention.

Do you do anything in church to promote the Grand Annual?

When the financial report is mailed out, the chair of the finance committee generally speaks very briefly at the end of Mass, indicating the state of matters and thanking people for their continued support.

Then when the Grand Annual is launched, I spend a brief minute or two appealing to parishioners at the end of Mass. I thank them and encourage them to contribute whatever they can. Throughout the campaign, we make brief announcements at the end of Mass to remind people of the Grand Annual but I try not to harp on it too much.

Do you put announcements in your parish bulletin about the Grand Annual?

At the beginning, we include a general description that the Grand Annual is under way – we mention the projects it will fund and the campaign's goal. Then, each week while the Grand Annual is under way, we include a progress report - the number of contributors and dollars contributed.

Do you follow up with those who haven't yet given, whether it is with a second letter or a reception of some sort?

Yes, usually about a month after the first letter goes out, Letter Concepts sends out a follow-up letter. This second letter is much briefer and more of a reminder, but it seems as though we receive as many gifts from this second solicitation as we do from the first letter.

Do you consider the services you receive from Letter Concepts more of a luxury or a necessity?

I would argue that any parish could use a third party firm. It's cost effective even if it looks expensive, because what you get in return more than balances out the cost. The accuracy that you can call for puts you at peace of mind - you are not duplicating letters or sending out wrong statements. One of the other great things about working with Letter Concepts is that they also send a thank you note, which is of course very important. They use a digital signature for my thank you letters and personally address them to the parishioners.

Do you do anything personally to thank parishioners? I call anyone who makes a significant gift.

Do you notice a difference in the number of people who give to the Grand Annual versus the weekly offertory?

About a third of the registered households respond to the Grand Annual mailing. Many are people who do not contribute to the offertory on a regular basis. I frequently saw this at my previous parish in Wayland too. Some parishioners see the Grand Annual as their yearly donation. Even people we did not often see at Mass gave to the Grand Annual. A fair amount of parishioners who regularly give to the offertory do give to the Grand Annual as well. Some do not because they think their regular giving is enough.

Is there anything else that you think leads to a strong Grand Annual that we haven't discussed?

I've always kept my approach to the Grand Annual as low-key as possible, so as not to make it an agonizing venture for anyone.

Interview with Fr. James Ronan on Grand Annuals - 8/19/2009

Father James J. Ronan is pastor of St. Mary - St. Catherine of Siena Parish in Charlestown, MA. He was ordained in 1982.

Your parish's Grand Annual almost doubled from 2007 to 2008. To what would you attribute this incredible growth?

I would point to three major initiatives as the catalysts of this growth.

First would be the decision in 2008 to focus not on trying to determine specific gift amounts for parishioners but to focus on increasing participation in the Grand Annual. In order to get as many parishioners involved as possible, we asked that each household contribute an amount equivalent to taking the family or friends out to dinner for one night. Since our parish is made up of some of the poorest families in Boston, and some very wealthy families, we hoped that this approach would allow and encourage everyone to give within their means. I think we were successful in this.

The second initiative that contributed to our growth was increased personalization of the letters. Last year I began hand-signing each letter and including personal notes.

Thirdly, we also instituted a practice of having lay parishioners speak about the Grand Annual from the pulpit in order to encourage greater participation. I believe that having lay people provide the explanation of the Grand Annual contributed to increased success.

Which one of these three initiatives made the biggest impact?

I think that directly tying the ongoing theme of increasing participation to our parish mission statement was crucial. As we worked to develop a greater sense of community and bring a controversial and diverse cluster of parishes together as one, the Grand Annual flowed somewhat naturally from the pastoral work of the parish. By articulating what we were chosen to be as a community, and the challenges that we faced to achieve this vision, the funding flowed almost as a consequence of the mission.

What does the Grand Annual benefit (i.e. specific or general needs)?

The Grand Annual is for general needs of the parish. We relate the Grand Annual to the annual financial report; we explain what the offertory/other collections have achieved towards our operating expenses, pointing to and explaining the shortfall, and then ask parishioners to help make up the difference with the Grand Annual so that we can balance the budget.

What do you include in the Grand Annual letter?

About a week or two prior to the Grand Annual, we make available an annual financial report. We've gone through several iterations of financial reporting, with the most brief and efficient also being the most effective. When we were still struggling with the merger, we reported every single financial item in hopes of increasing trust. But as we have grown in trust, we are able to keep it briefer and crisper. We do not mail this report out and as tensions have decreased, we included it as a four page bulletin insert last year. With the Grand Annual letter itself, we mail a remittance envelope that parishioners are welcome to mail back or they can drop in the collection basket with their gifts.

Do you include suggested amounts on the remittance envelope? Are parishioners also given a Grand Annual envelope in their offertory envelope packets?

We do not include specific amounts on the remittance envelopes. Yes, parishioners do also receive a Grand Annual envelope with their offertory envelopes.

After a while, do you follow up with those who haven't yet given, whether it is with a second letter or a reception of some sort?

Yes. We send out a follow-up letter about four weeks after the start of the campaign in early November. Starting last year, we now personalize these letters as well.

Do you use an outside firm or handle all aspects of the Grand Annual campaign internally?

We do everything internally, besides getting mailing labels from the envelope company.

Is there anything else about your Grand Annual that we haven't discussed yet that you think contributes to its success?

I would emphasize how important it is to our success that parishioners in Charlestown feel good about their parish, that they've stepped forward, and that they've supported some very radical changes - closing churches, undertaking a capital campaign. I think that the most important thing to do is to continue reminding people of who they/we are as a parish and showing them where the money goes and how successful we are. There is a feeling in the parish that things are alive and parishioners *want* to contribute since so many good things are happening - beautiful liturgies with music, social ministry programs, food pantry programs, recovery programs, to name a few. Parishioners are more inclined to support a parish that is moving forward and responding to their needs. Once the investment is made in these initiatives, the money will follow.

Interview with Fr. Michael Guarino on Grand Annuals - 8/19/2009

Fr. R. Michael Guarino is pastor at St. Anthony of Padua Parish in Revere, MA. He was ordained in 1968.

Why do you think your Grand Annual is so successful?

Simply put, we use Letter Concepts for our Grand Annual.

What are the specifics of your Grand Annual campaign?

The Grand Annual takes place throughout September, October, and November. Letter Concepts sends out an initial appeal letter with a pledge card asking each household to contribute \$300 or more to the Grand Annual in September. After some time has passed, Letter Concepts sends a follow-up letter to those who have yet to give. Further, they send a thank you letter to each parishioner that contributes to the Grand Annual. A digital version of my signature is used on all of the letters.

Why do you choose to use a third party firm to handle your Grand Annual?

When I arrived at the parish, the Grand Annual raised around twenty thousand dollars. Seeing this, I did not think I could do any better, as the parish had been led by a well-established pastor before me. I had received an advertisement from Letter Concepts so I brought them in.

How much do you pay for Letter Concept's Grand Annual services?

We pay a little under \$5,000 dollars for the Grand Annual campaign.

Do you think that this money has been well spent?

I would certainly agree that this has been a smart investment. We've greatly increased the amount we raise in our Grand Annual for a relatively small fee.

With Letter Concepts working with you, what work does your parish staff have to do anything for the Grand Annual?

We don't have to do much. Our parish secretary makes copies of the pledge cards/payments as they come in and faxes them to Letter Concepts so they can handle it all – from thank you letters to updates to database maintenance.

Do you speak about the Grand Annual at Masses and include any bulletin announcements?

The week before we launch the Grand Annual, I preach at all the Masses. Letter Concepts sends out draft bulletin announcements and even prayers of the faithful for the Grand Annual. As we wrap up the campaign in November, I again mention the Grand Annual at Masses, thanking the parishioners for their support.

Do you publish a goal for the GA?

I usually set a goal of \$75k. This year, due to the struggling economy, I lowered it to \$70k.

Do you think that the decision to ask each household for a gift of \$300 or more has garnered a positive response?

Yes, I think parishioners responded greatly to this. I think that if you ask for something specific, the parishioners want to come through, and do come through. If we just asked for a general amount, I do not think that as many people would give as much as \$300. Even long after November, people are sending in gifts - they feel a responsibility to support the parish.

What does your Grand Annual benefit (i.e. specific or general needs)?

The Grand Annual is for general needs and is used to help meet the parish's operating budget. The Grand Annual is one of our major sources of income.

Are parishioners asked to mail in their gifts or to place them in the collection baskets at Mass?

Parishioners can choose to either mail in their gifts or place them in the collection baskets.

What advice would you give to a pastor that wanted to implement a Grand Annual in a parish that does not currently have one?

I would absolutely recommend that the pastor get in touch with one of the parish fundraising companies. This is the work of these companies. They know what they're doing. They know how to help a parish increase its Grand Annual and offertory. I would also advise the pastor to write an honest, down-to-earth letter; lay out the facts, hide nothing, and go from there. Letter Concepts has been great in drafting letters like this for us. If you stick to this down-to-earth approach, the parishioners come to expect the Grand Annual and take it as a responsibility.

Interview with Fr. Michael Steele on Grand Annuals - 8/18/2009

Fr. Michael L. Steele is pastor at Our Lady Star of the Sea Parish in Marblehead, MA. He was ordained in 1977.

Thank you for sharing your Grand Annual materials with us. I particularly like how you have developed parish goals that are very down to earth and that parishioners can certainly get behind. Could you speak on this short, practical list of goals and how it contributes to your Grand Annual success?

I'm now starting in my fifth year as pastor at Our Lady Star of the Sea. When I first arrived, I was replacing a pastor who had served there more many years. To begin a discussion with the parish councils about how to move the parish forward, I figured that a good place to start would be to collaborate on parish goals. To advance our mission and deepen our spirituality, I hoped that developing concrete goals would get us there. We have just finished our two year goals and it's now engrained as a process. Because of this, parishioners know our priorities and have a good sense of where the parish is investing its resources.

It is very helpful that there are six clear goals that allow you to measure your success towards achieving them. The parish is intentional about its future.

Yes. We have a focus on our mission and our spiritual development. ARISE has been very successful at our parish. What I like about ARISE is that it's created a new sense of spirituality here. Over 180 parishioners have joined our ARISE groups. We've instituted Adoration on Monday afternoons – we got 27 people here yesterday afternoon! I think that to focus on spirituality is very important - community, message, service, and worship.

How have these priorities contributed directly to your Grand Annual success?

We've worked really hard to incorporate spirituality in our parish. We've brought in speakers, increased religious education, and began a family liturgy. The family liturgy greatly helped the Grand Annual – we're getting a full church at these masses. First communions are up. Confirmations are up. Parents are not just dropping their kids off for CCD and leaving. Since we've moved CCD to Sunday, parents are staying on the parish campus, socializing, becoming more involved in the parish life. We've really invested in the spiritual life of the parish, making sure that people see the parish heading towards becoming more spiritually enriching and more alive. When we then go and ask people to invest in that continued growth, they are much more inclined to *want* to do so.

What are the specifics of your Grand Annual campaign?

We launch the Grand Annual in September with a letter, photo sheet, and annual financial statement. We mail these materials, along with a remittance envelope, to every registered household. To ensure the financial statement is the best it can be, we have a CPA read and edit it. About three weeks prior to this mailing, we send a newsletter informing parishioners of our parish life. This year we also sent one of these newsletters in the spring and also during Advent. These newsletters contain pictures of parish life and an upcoming events calendar, encouraging parishioners to get involved. We include photos to help visual learners see how we've invested their contributions. I think it is very important to inform parishioners as to where all the money is going in the parish so that they are encouraged to continue supporting our wonderful activities. Pictures drive the point home better than words.

Do you ask parishioners to give specific amounts?

We do not. Our finance council recommended that we do not include specific amounts on the envelopes.

Do you speak or have a lay person speak about the Grand Annual and annual financial report at Masses?

We have lay people who have been active in the parish speak on the Grand Annual. They are the ones who can best make the case to their fellow parishioners.

How do you recognize, thank, or acknowledge donors for their gifts?

We thank people right away, sending out the thank you note immediately. I hand sign these thank you letters. Parishioners appreciate the quick thank you. If parishioners give more than one gift, they will get a thank you card each time.

Do you notice a difference in the number of people who give to the Grand Annual versus the weekly offertory?

Some parishioners that do not regularly support the offertory choose to give a onetime gift to the Grand Annual. We probably receive around 300 responses from the 1,800 registered households.

Do large gifts make up a significant part of your Grand Annual contributions? Would you consider your Grand Annual to be “top-heavy”?

I would consider any gift over \$1,000 to be an “extraordinary gift,” and I send a personal thank you note to anyone giving such a gift. I would say that there are typically about 50 of these, with the largest gift probably being about \$25,000. The most typical gift is probably about \$150, but we get quite a few gifts of \$200-\$250.

Do you publish anything in your parish bulletin to promote/track the Grand Annual?

We publish an update every week in the bulletin, all the way until March and April. We only track the amount of money received, not the number of gifts received.

Are parishioners asked to mail in their gifts or to place them in the collection baskets at mass?

Parishioners can either mail in their gifts or place them in the collection baskets. We also implemented electronic giving in our parish last year so some give this way.

What advice would you give to a pastor that wanted to implement a Grand Annual in a parish where there is not currently one?

I would recommend that the pastor hold off on implementing a Grand Annual for a year or two while he focuses the parish on the mission of spirituality and enhances the life of the parish. A pastor must first show his parishioners that he is giving them something. Even if money is tight at first, pastors can institute adoration, position Christ as the center of the mission of the church, enhance your music, make sure the liturgies are beautiful, have well-trained lectors. You must examine what you are offering to the community and ask parishioners where they want the money to be spent.

After the parish community is built up, I would suggest that the Grand Annual should focus on growing the parish and not focus on specific projects such as a roof or boiler; those projects are more for a capital campaign. I would also stress that the thank you component is important.

Finally, I think pastors should invest in a family liturgy, strengthen religious education, gather parents while their children are in CCD - a great way to build a community and recruit catechists. These steps are very important as to why our Grand Annual has increased. The parish must continually be moving towards greater spirituality and revising its mission statement so that people are involved, invested, and renew their commitment to living the mission. It may take a couple of years to build, as it has for us, but it leads to a very successful parish.

Interview with Fr. George Evans on Grand Annuals - 8/13/2009

Fr. George P. Evans is pastor at St. Julia's Parish in Weston, MA. He was ordained in 1977.

Your parish has seen a fairly steady increase in its Grand annual from 2006 to 2008. To what would you attribute this increase?

Specifically in regards to the increase, the only change I can think of is that I instituted an annual parish report in the 2008 campaign. Before the 2008 campaign, I went to a workshop at St. Mary's in Winchester on creating annual parish reports. I really liked one of the reports I saw at this workshop so I used it as a model to create one for our parish. The annual report was a step above our usual Grand Annual letter that only included about a page with a financial/budget report. The new annual report included a few pictures and our parish's financial data for the previous fiscal year. This is the only thing that we have changed and although I didn't receive any feedback about the report, I can only imagine that it helped.

We work really hard on issues of pastoral life and put a lot of effort into providing spiritual nourishment to our parishioners. I trust that they appreciate that we do a lot in our parish. Our activity helps them to respond generously when we make appeals.

Did you mail this parish report to parishioners? If so, when?

Yes. We mail the report to all registered households about a month before our Grand Annual mailing goes out.

What do you include in your Grand Annual mailing?

In 2008, since we had the annual parish report, I kept the Grand Annual letter to one page and did not include financials since they were in the report that went out the previous month. In 2007 I included a longer letter in which I described some of the challenges and complications in running a parish in the present world and it seems to have been well received. I try to change the letters each year. Since I'm more verbal than picture-oriented, I do not include many pictures in the letter, instead we include them in the annual report. We also include a gold-colored envelope with the letter. This is in addition to a Grand Annual envelope parishioners receive with their offertory envelopes.

Do you ask parishioners for specific gift amounts?

Before I joined the parish, there was a history of an approach in which parishioners were asked to give \$600 per household each year. When I arrived, I was told that people resented this approach so I started to include a line in my letter saying that I know that in the past there was a guideline for \$600 per family, but I am aware that there are many families that cannot afford that, many that can afford that, and others that can afford more. I mention that I include this historical number in case parishioners would like a guideline, but I trust their ability in knowing what they give to the church throughout the year and in knowing what they can give to the Grand Annual. I don't want to make parishioners feel as though I am requesting the \$600 gift but it seems to be a well-known figure.

Do you include suggested gift amounts on the envelope?

We do not. There is a blank line on which parishioners can input their own gift amount.

Do you speak about the Grand Annual at Masses?

There is no emphatic verbal appeal for the Grand Annual from the pulpit. One year we did have a couple of lay parishioners speak on stewardship at Masses but these talks were not meant to replace the homily and they focused on time, talent and treasure. The treasure aspect was not given any more attention than time or talent, and I would say that there was only a vague connection to the Grand Annual.

Do you publish anything in your parish bulletin to promote/track the Grand Annual?

I write a letter in the parish bulletin every week, so for two weeks around the time of the Grand Annual, I usually make about one third of this letter about the Grand Annual. In this I speak very honestly about the need for the Grand Annual.

We also always have a section in the bulletin with statistics – offertory collection, special collections, Catholic Appeal – and during the Grand Annual campaign, we include the amount raised to date for the Grand Annual.

Do you do anything in November or December in terms of a second appeal to those who have yet to contribute?

Yes. Every year before Christmas we send out a letter about the availability of Christmas Masses and activities. We have two version of this letter, one for those who have given to the Grand Annual and one for those who have not yet given. The letter to those who have given thanks them for their support while the other essentially summarizes the first Grand Annual letter. I think that this second letter is important because I think that many parishioners wait until the end of the year to give their gifts for the Grand Annual, so it serves as a friendly reminder.

Do you notice a difference in the number of people who give to the Grand Annual versus the weekly offertory?

I think that the most generous parishioners give to both the weekly offertory and the Grand Annual but I would guess that we have a fairly substantial number who give only to the Grand Annual. Some of these parishioners are not heavily involved in the parish's daily, pastoral, and spiritual life but still wish to support the church.

How do you recognize, thank, or acknowledge parishioners for their gifts?

Currently, the only thing we do is send out the Christmas letter. I recognize that we can do better in this respect. I do write a personal note to all those who give a gift over \$1,000.

Do you use an outside firm or handle all elements of the campaign internally?

We handle everything internally. I would note, however, that in addition to the envelope we send with the Grand Annual letter, we provide envelopes for the Grand Annual in the offertory envelopes as well.

Is there anything else about your Grand Annual that you would like to share that we have not covered?

I would mention that the tradition in this parish seems to be that people give a lot to the Grand Annual but do not give as strongly to the weekly offertory. St. Julia's is sort of unusual in that many of the parishioners did not grow up in this parish, nor do many plan on retiring here. The people also seem to be used to giving money in larger denominations instead of giving weekly.

We plan to add a family mass to help engage younger families at the parish. We really need to build up a better sense of closeness in the parish and with that will come more support, we hope.

In September of 2004, St. Joseph's in Lincoln became part of our parish. They had relied on a monthly collection instead of a grand annual. So we needed to introduce the Grand Annual concept to them through my pastor columns and other forms of communication.

Interview with Fr. Richard Messina on Grand Annuals - 8/12/2009

Fr. Richard C. Messina is pastor at St. Mary's Parish in Winchester, MA. He was ordained in 1965.

Why do you think your Grand Annual is so successful?

I think that an important reason that we have such a successful Grand Annual is that we work hard at making our parish open and welcoming. Through our homilies and activities, we really try to develop a feeling of "welcomeness." I think that when parishioners feel connected to a parish they are much more inclined to support the parish generously.

Is there anything about your Grand Annual success that you think is unique to your parish?

The fact that we have such an open and welcoming parish, with over 400 adult volunteers and over 125 high school volunteers, is certainly an important reason why we have a strong Grand Annual. Over the years our parishioners have become more and more involved and are motivated to support the parish. I think that we have an amazing parish staff and just a great spirit in our parish. Parishioners *want* to give to a parish to which they feel so connected.

What are the specifics of your Grand Annual campaign?

The first thing that we do is send out a transparent financial report in September, letting parishioners know where all the money was spent in the previous fiscal year. By October 15, we then send out our first Grand Annual letter, coming from me. I have not felt the need to speak about the Grand Annual from the pulpit but we do place announcements in the bulletin encouraging parishioners to give.

What does the parish financial report look like?

The financial report is important. It goes beyond just listing the parish finances, providing descriptions of ministries and various parish activities in addition to the numbers. Usually the report is a 2-4 page booklet.

Do you follow up with those who haven't yet given, whether it is with a second letter or a reception of some sort?

Yes. Around November 15 we send out a second letter to parishioners who have not yet given, emphasizing that we haven't heard from them and thanking them for "thinking of giving." Last year we sent another letter in December as well, but this year we probably will not send this third letter.

How do you recognize, thank, or acknowledge donors for their gifts?

Last year as soon as we received a gift, we sent out a thank you postcard and then later followed this postcard up with a thank you letter. This year we will send out a thank you letter right away. I sign every letter and often include a personal note.

Do you use an outside firm or handle all elements of the campaign internally?

We handle everything internally, except for the printing. I used to work with a firm to write the letters but they weren't as personal as I wanted them to be so I always edited them. This year I will be writing the letters myself.

Do you send the Grand Annual letter to all parishioners or only to those that receive offertory envelopes?

We send the Grand Annual materials to every registered household.

Do you notice a difference in the number of people who give to the Grand Annual versus the weekly offertory?

Yes. Some families that don't give to the offertory give to the Grand Annual. Even some parishioners that do not regularly attend Mass support the Grand Annual. I think that this is because they know who we are in the parish, they just don't regularly attend Mass here. We send out about 2,600 letters and get a response from about 600 households.

Are parishioners asked to mail in their gifts or to place them in the collection baskets at mass?

Parishioners can either mail in their gifts in the envelope provided with the Grand Annual mailing or they are welcome to drop them in the collection basket.

Do you ask parishioners to give specific amounts?

In the past we used to ask for specific amounts, including a statement in the letters saying, "Last year you gave \$___ to the Grand Annual, this year we ask you to give \$___." But last year we decided to discontinue this practice. A few people each year voiced resentment about our suggestion of what to give. Now, we do provide parishioners a customized table of gift-level boxes with suggested amounts based on the amount they gave last year. This way we are able to provide suggested gift amounts without offending anyone.

What does your Grand Annual benefit (i.e. specific or general needs)?

Our Grand Annual is not for a specific project. In our letters we mention all the various activities and ministries in our parish - the elderly, the youth, the education of the youth, the health of the elderly, etc. The Grand Annual is important in helping us catch up with the bills and support our parish ministries.

Do you speak or have a lay person speak about the Grand Annual and annual financial report at Masses?

In the past we had lay people speak about the Grand Annual at Masses but last year we did not. Perhaps this is a reason why the Grand Annual did not do quite as well last year, but we were also in the middle of a capital campaign so I didn't want to bombard people with too much fundraising. We are debating about re-instituting the lay speaker this year.

Do large gifts make up a significant part of your Grand Annual contributions? Would you consider your Grand Annual to be "top-heavy"?

We do get quite a few large gifts. The top 20% of donors give a larger percentage than the rest. We receive gifts as large as \$25,000 from top contributors. We receive many \$750 and \$1,000 gifts.

Interview with Fr. James Rafferty on Grand Annuals - 8/11/2009

Fr. James F. Rafferty has been pastor at St. Paul's Parish in Hingham, MA since 1994. He was ordained in 1963.

Why do you think your Grand Annual is so successful?

I think that being in the parish for 15 years and always being very honest with our parishioners about what needs to be done has helped. We really work to develop trust and active participation amongst our parishioners, and I think that results in increased generosity.

Is there anything about your success that you think is unique to your parish?

There is a good history of generosity amongst our parishioners. They respond to concrete needs. Each time we have come to ask them for significant funds, they have responded.

What does the Grand Annual benefit (i.e. specific or general needs)?

Our Grand Annual has become an annual fund for special projects. The weekly offertory covers our annual operating budget, so every year we have a specific project that the Grand Annual funds. We are sure to clearly communicate the specific need and parishioners are pleased when we follow through with information about how we've spent their contributions toward the project. I think that this model helps because visible projects motivate people; operating expenses don't have quite as much "sizzle" as specific projects.

Do you use an outside firm or handle all elements of the campaign internally?

We handle all matters internally, besides the printing of materials, which is done by Blue Hill Printing. We [the parish pastoral council and I] talked to a firm a couple of years ago about outsourcing it. But after the presentation, our people were motivated and decided that we could do it ourselves. Since then, we have worked hard to accomplish a successful campaign each year.

What are the specifics of your Grand Annual campaign?

We start our Grand Annual in October because everyone is hopefully back by the fall – during the summer there is a tendency for the parish to somewhat clear out, as many people go to the Cape. In our Grand Annual mailing, we include a cover letter and a brief budget report detailing what came in last year and what it was spent for, along with a projected budget for projects that are ahead, and a remittance envelope for gifts. A couple of days following the mailing, a member of our parish finance council gives a prepared talk about the Grand Annual at all masses. I also mention the Grand Annual in my preaching, but always keep it gospel-based. Similarly, a couple of times each fall, I mention the GA in my pastoral letter in the bulletin.

Do you send the GA letter to all parishioners or only those who receive offertory envelopes?

Every registered parishioner/family receives the Grand Annual mailing and we place copies in the back of the parish for those who want to give but are not registered.

Are parishioners asked to mail in their gifts or to place them in the collection baskets at mass?

We give parishioners the option to either mail in their gifts or drop them in the basket. Most seem to prefer to mail their gifts.

Do you provide updates to parishioners on how the GA campaign is going?

Yes, every week there is an announcement in the bulletin on how much we have raised to date.

Do you follow up with those who haven't yet given, whether it is with a second letter or a reception of some sort?

No, we do not send a follow-up letter or hold receptions.

How do you recognize, thank, or acknowledge donors for their gifts?

We thank donors by sending a personal letter. I sign every thank you letter and include personal notes to many parishioners. I also personally call those who give major gifts to offer sincere thanks.

Your parish's Grand Annual has grown significantly over the past couple of years. To what would you attribute this growth?

I'm not entirely sure what explains the growth but we have worked hard to build up confidence and trust in our parish, and that certainly goes a long way in helping our Grand Annual.

Do you notice a difference in the number of people who give to the Grand Annual versus the weekly offertory?

I would say that, on average, about the same number of people give to the Grand Annual as give to the weekly offertory. We send materials to about 2,400 registered families and can count on about 300-350 families for gifts (as well as for weekly offertory contributions).

Do large gifts make up a large part of your Grand Annual contributions? Would you consider your Grand Annual to be "top-heavy"?

I would not consider our campaign to be overly top-heavy. We received one \$20k gift last year but other than that, the vast majority of gifts are under \$10k. I would consider \$5k a good-sized gift for our campaign, and we will get several of those.

What advice would you give to a pastor that wanted to implement a Grand Annual in a parish where there is not currently one?

I would recommend that a new pastor wait a year or two before instituting a Grand Annual. It is important to build up the offertory first. I'd also stress that it's critical to promote a spirit of giving and generosity and that the pastor must ask very humbly and directly. Every year I believe it's important to reinforce the idea that the GA is for special expenses while the offertory is for operating expenses.

Interview with Fr. Richard Fitzgerald on Grand Annuals - 8/11/2009

Fr. Richard W. Fitzgerald, VF is pastor at St. Paul's Parish in Wellesley, MA and Vicar Forane of the West region. He was ordained in 1987.

What are the specific details of your Grand Annual campaign? Why do you think your Grand Annual has grown significantly in the past few years?

We always hold our Grand Annual in the fall, usually late September or early October, when everyone seems to be back from summer vacation and in a good mood.

We used to send out a letter with a summary of the previous year's fiscal data and a paragraph on the Grand Annual. In 2007, however, we decided to send an annual income and expense report for the previous fiscal year at the end of August and then send out a separate mailing with Grand Annual materials in September.

The Grand Annual materials now consist of an appeal letter including the upcoming year's budget and any significant expense info, as well as a list of all the things done in the parish over the last five years and a remittance envelope.

In my mind, it is important to include as much information as possible about what has happened in the parish – especially, any significant expenditures. In 2007 we also began speaking about the Grand Annual at all masses. I speak about the nature of the appeal - why it's important - and also mention the budget and why we need the money. I specifically point to what projects will need to be undertaken in the next year.

Do you use an outside firm or handle all aspects of the Grand Annual campaign internally?

Everything besides the printing is handled internally.

What does the Grand Annual benefit (i.e. specific or general needs)?

Our Grand Annual helps fund general operations of the parish. We do not use it to fund one specific project, but rather tie it to the total needs of our parish. I feel that tying it to one specific project might make it difficult if we were without a big project one year.

Do you ask parishioners to give specific amounts?

We do not ask for a specific amount from each parishioner, but the remittance envelope has a table of gift-level boxes containing suggested amounts - \$100, \$500, \$1000, or Other (on the higher end). These envelopes are distributed with the Grand Annual letter, not with the offertory envelopes. We ask in general for parishioners to increase their gifts if they are able, but we do not tailor this request to each individual.

Do you speak or have a lay person speak about the Grand Annual and annual financial report at masses?

No one speaks on the budget and income statement, but the week before the Grand Annual materials go out, I speak about the Grand Annual request at all Masses.

Do you send the Grand Annual materials to all parishioners or only to those who receive offertory envelopes?

We send the materials to all registered families and we leave copies in the back of the parish for those who are not registered.

Are parishioners asked to mail in their gifts or to place them in the collection baskets at mass?

Parishioners can either put their gifts in the collection basket or mail them to us in an envelope sent in the Grand Annual mailing. Many parishioners choose to mail in their gifts.

Do you follow up with those who haven't yet given, whether it is with a second letter or a reception of some sort?

We do not send any follow up letters or hold any receptions. We do put a note about the Grand Annual in the bulletin, but we do not put the amounts that are coming in. Our parish finance council has decided not to put figures in the bulletin, as the consensus is that an annual report shows all the expenses so we do not need to put numbers in the bulletin every week. Our finance team actually thinks that doing so might make people tend to think that the parish is doing fine and does not need more money.

Do you notice a difference in the number of parishioners that give to the Grand Annual versus the weekly offertory?

To some degree. There are people who give regularly to the offertory but that don't give to the Grand Annual. I plan on promoting the Grand Annual even more at the family mass to encourage the younger families to become more involved. Overall, we send out about 800 letters and get about 300 responses.

How do you recognize, thank, or acknowledge parishioners for their gifts?

We send a thank you letter to everyone that gives a gift to the Grand Annual. I hand sign each of these letters and often include a personal note.

What advice would you give to a pastor that wanted to implement a Grand Annual in a parish where there is not currently one?

Justify the need. There are always needs, but you must to give your parishioners sufficient info to justify the need as something they want to support. Mention real needs/projects that will have to get done this year. I would also stress the importance of the Pastor's talking about the Grand Annual directly and the needs of the parish, even if he is reluctant.

Do large gifts make up a large part of your Grand Annual contributions? Would you consider your Grand Annual to be "top-heavy"?

No. We do not typically receive any gifts over \$10k, with the top gift probably being \$8k.

Interview with Fr. Michael Lawlor on Grand Annuals - 8/10/2009

Fr. Michael Lawlor is Pastor at St. Joseph's Parish in Needham, MA. Previously he served as Pastor at St. Maria Goretti in Lynnfield. He was ordained in 1973.

Why do you think your Grand Annual is so successful?

I think that our parishioners see all the good things that take place in our parish, for themselves and for their children, and are thankful. They realize that in order for these services to continue, they must support the parish; many do this through the Grand Annual. A parish must be alive, as ours is, because people will be more likely to give to something that's vibrant. I have no problem speaking about money and I think that's important to get parishioners involved as well.

Is there anything about your success that you think is unique to your parish?

We have a very active parish with a strong history of stewardship. Success breeds success.

Do you use an outside firm or handle all aspects of the Grand Annual campaign internally?

Everything is done internally except for the printing, which is handled by the envelope company.

What are the specific details of your Grand Annual campaign?

We start our Grand Annual in September. We distribute campaign materials in tandem with our annual parish financial report. So, our Grand Annual mailing includes the parish financial report with a brief summary from a member of the parish council, an envelope for parishioners' gifts, and a letter from me (the pastor) requesting support. The financial report, a product of months of analysis by our finance council, is a bare bones report of the financials, but I also include in the accompanying letter something about what's happening pastorally - pastoral life, religious ed., baptisms, etc. In my letter I mention why the Grand Annual is so important but I'm also careful to keep it to one page so that parishioners take the time to read it.

Do you send out a letter to all parishioners or only those who receive offertory envelopes?

We send out the Grand Annual materials to every registered household – for us that is about 2,100 families.

How important do you think it is that the GA is tied to the parish financial report?

I think it's quite important, as it allows people to see how the money is spent. For most parishes, I think it's very helpful to share the annual report. Even if not everyone reads it, I think it's important to have it there for parishioners.

What does the Grand Annual benefit (i.e. specific or general needs)?

The Grand Annual is one of the most important things that we do to keep the parish going. The GA is for all the operating expenses of the parish.

Do you ask parishioners to give specific amounts?

No, we don't ask for specific amounts. We ask our parishioners to be as generous as possible.

Do you follow up with those who haven't yet given, whether it is with a second letter or a reception of some sort?

No, there is no follow-up letter or in-house receptions. Because of our large parish, there is so much fundraising going on that I don't like to constantly flood people with materials. We do host receptions for the capital campaigns, but not for the Grand Annual.

How do you recognize, thank, or acknowledge parishioners for their gifts?

We thank parishioners with a personal letter. I sign every thank you letter and include personal notes. This letter also covers the IRS tax requirements for their giving.

Your parish's Grand Annual has grown significantly over the past couple of years. To what would you attribute this growth?

I would say that this is partly due to the fact that in 2006 some people were still paying their capital campaign pledges; they couldn't pay for two things at once.

Have many parishioners increased their support of St. Joseph's Grand Annual over the past 3 years?

I think the growth has had more to do with parishioners sustaining their overall giving to the Parish. As they paid off their capital campaign pledges they were able to shift some of their support over to the Grand Annual.

Do you notice a difference in the number of people who give to the Grand Annual versus the weekly offertory?

More people contribute to the Grand Annual than to the weekly offertory; however, the core of Grand Annual support is indeed those that give to the weekly offertory.

What advice would you give to a pastor that wanted to implement a Grand Annual in a parish where there is not currently one?

Most importantly, I would tell this pastor to write a letter to each household and include with it a financial report. The letter should stress how the Grand Annual is necessary to continue the current services and not scare people into giving. I would also recommend providing parishioners the option to make multiple payments toward their Grand Annual pledge. Every parish is different, but at my previous parish in Lynnfield (St. Maria Goretti), instituting the option of multiple (3) payments significantly increased our Grand Annual.

Do you have an idea of the total number of parishioners who support the Grand Annual?

Last year we sent out 2,100 letters and received 555 responses.

What percentage of the total amount raised do the top 10 donors contribute?

Our Grand Annual is not very top heavy. Just over 27% of our gifts are between \$100 and \$150.

How many donors give more than \$1,000?

Under 5%.