

September 2006

Dear Friends:

This year our Parish Annual Appeal will be held on the weekend of September 30 and October 1.

We rely on the Annual Appeal as well as the weekly and monthly offerings to cover the operating expenses of the parish. As in the past, last fiscal year saw an increase in our regular expenses due to increased parish salaries and benefits, utilities, and property insurance, among some others. Last fiscal year, as opposed to the year before, we held the line, for the most part on major capital expenditures. However, so far this new fiscal year, significant structural renovation and repairs have been made to the rectory in addition to the replacement of the heating systems in the parish hall and rectory. Already, these costs have totaled over \$XXX,XXX.XX. Before the fiscal year ends, I also see the need for replacement of the flat roof on the rectory and repairs to the schools building windows and utilities. I am sure that you can appreciate from your own experience that expenses are increasing in all areas of parish life.

For your review, I have included on the back of this letter a summary report of our parish revenues and expenses from the past fiscal year. If you have any questions about a particular item, please feel free to contact me. Last fiscal year, our parish expenses (not including the school) totaled \$XXX,XXX.XX. We were able to pay all our bills with no outstanding debts. **However**, as was the case last year, we were able to pay these bills due to the receipt of several large bequest and gifts from parishioners amounting to \$XXX,XXX.XX. **Without these bequests and gifts we would have had a significant deficit.** In the future, we cannot count on such windfall funds for our operating expenses. A significant increase to the offertory and grand annual collections is needed.

As I noted last year, a parish can neither be judged by the funds that it raises nor the money it spends. However, if we are to continue to praise the Lord as we should, educate the young, and particularly recognize our responsibility to reach out to those in need, then we must recognize our obligation to share our time, talent, and treasure for the building up of the parish.

I personally ask for your most generous possible support of our Annual Appeal so that we can continue to provide the services you need as parishioners. Last year we raised \$XXX,XXX.XX in our appeal. Yet, less than 50% of parishioners responded to the appeal. My hope is that this year we may significantly exceed that amount. It is important for **every parishioner** to support this endeavor. I love being pastor here at Saint XXXXXX Parish and I appreciate all the various means of support offered by you, the parishioners. My prayer is that we all may steadily grow in faith and love as we continue the work of Christ and His Church. God bless you.

Sincerely yours,

Rev. XXXXXX XXXXXXXXXXXX
Pastor

Income Statement – July 2005 through June 2006 FY 06

Income	
Offertory and Monthly	400,000.00
Grand Annual	150,000.00
Sacramental Offerings	15,000.00
Gifts and Bequests	200,000.00
Gifts and Bequests, restricted	3,000.00
Religious Education and Youth Ministry	60,000.00
Donations – Other	20,000.00
Interest/Dividend Income	30,000.00
Other Income	4,000.00
Fundraising Activities	3,000.00
 Total Income	 885,000.00
 Expenses	
Employee Salaries, Compensation and Benefits	320,000.00
Clergy Stipend, Insurance and Benefits	55,000.00
Pamphlets, Religious Ed. Books	20,000.00
Office and Related Expenses	40,000.00
Household	19,000.00
Utilities, Heat, Water	30,000.00
Property Insurance	18,000.00
Property/Grounds/Building Maintenance and Supplies	86,000.00
Charitable Works/Gifts	35,000.00
Pastoral/Liturgical/Rel. Ed./Youth Ministry Activities	60,000.00
Capital Improvements	35,000.00
Transfer to School	92,000.00
Miscellaneous/Other Expenses	10,000.00
 Total Expenses	 820,000.00
 Net Income	 65,000.00

August XX, 2007

Dear Friends:

I am writing to you to provide our annual parish income and expenses financial report for the fiscal year July 2006 through June 2007 (FY07).

Last year saw an increase in our expenses due to increased parish salaries and benefits, and capital improvements. Several major capital expenditures had to be made to maintain our property. Such improvements included replacement of the rectory boiler, hot water, and cooling systems; replacement of the parish hall heating system; installation of a new flat roof on the side of the rectory; and reconfiguration and reconstruction of two first floor rooms in the rectory. As you can appreciate, in order for us to maintain our parish properties, we are continually facing such capital expenditures.

For your review, I have included on the back of this letter a summary report of our parish revenues and expenses from the past fiscal year. If you have any questions about a particular item, please feel free to contact me. Last fiscal year, our parish revenue amounted to \$XXX,XXX.XX. Our parish expenses (not including the school) totaled \$XXX,XXX.XX. We were able to pay all our bills with no outstanding debts. As you can see, we had a net income of \$XXX,XXX.XX. However, as you can see, we had a deficit of \$XX,XXX.XX which was made up through our parish savings.

Next month, I will be writing to you again relative to our parish grand annual appeal. At that time, in coordination with our parish finance council, I will provide a fiscal year budget for July 2007 through June 2008. In that way, you will be able to more clearly see the financial requirements of the parish. Already, this new fiscal year, capital improvements have begun. I am sure that you can appreciate from your own experience that expenses are increasing in all areas of parish life.

As pastor, I take my fiscal responsibilities seriously. Part of that responsibility, in cooperation with the parish finance council and parish staff, is to insure that parishioners are informed of the financial status of the parish and are confident that monies are well spent and that programs and properties are well maintained. I always like to note, a parish can neither be judged by the funds that it raises nor the money it spends. However, we must recognize our obligation to share our time, talent, and treasure in a fiscally responsible manner.

May God continue to bless you and your loved ones during these summer days.

Sincerely yours,

Rev. XXXXXX XXXXXXXXXXXX
Pastor

Income Statement – July 2006 through June 2007 FY 07

Income	
Offertory and Monthly	450,000.00
Grand Annual	160,000.00
Sacramental Offerings	15,000.00
Promise for Tomorrow Income	10,000.00
Gifts and Bequests	40,000.00
Religious Education and Youth Ministry	60,000.00
Interest/Dividend Income	30,000.00
Fundraising Activities	25,000.00
Transfer from School	4,000.00
Other Income	10,000.00
 Total Income	 804,000.00
 Expenses	
Employee Salaries, Compensation and Benefits	340,000.00
Clergy Stipend, Insurance and Benefits	70,000.00
Pamphlets, Missalettes, Religious Ed. Books	10,000.00
Office, Supplies, Equipment, and Related Expenses	40,000.00
Household	20,000.00
Utilities, Phone, Heat, Water	35,000.00
Property Insurance	10,000.00
Property/Grounds/Building Maintenance and Supplies	60,000.00
Charitable Works/Gifts	35,000.00
Pastoral/Liturgical/Rel. Ed./Youth Ministry Activities	60,000.00
Capital Improvements/Buildings and Equipment	125,000.00
Transfer to School	50,000.00
Miscellaneous/Other Expenses	10,000.00
 Total Expenses	 856,000.00
 Net Income	 -52,000.00

September XX, 2007

Dear Friends:

This year our Parish Annual Appeal will be held on the weekend of September 29 and 30. We rely on the Annual Appeal as well as the weekly and monthly offerings to cover the operating expenses of the parish.

Last month, I wrote you and provided our annual parish income and expenses report for the fiscal year July 2006 through June 2007 (FY07). At that time, I informed you that I would be writing to you again relative to our parish annual appeal, providing a fiscal year budget for July 2007 through June 2008. The budget, which has been prepared in coordination with our parish finance council, is included as Exhibit A to this letter and amounts to \$XXX,XXX.XX. The largest element of the budget is salaries and benefits and reflects actual costs for this fiscal year. In order to maintain the liturgical, spiritual, and religious educational life of our parish we require the services of 18 full and part-time clerical and lay employees. The line item for capital improvements and equipment includes replacement of the bell tower roofs and flashing, and repair and painting of the church balcony area due to water leaks, among others. Some of these capital expenditures are in process and all capital expenditures over the years have been deemed necessary by our finance council. Also included with this letter is Exhibit B detailing the capital improvements to our buildings and property which have been done for the past four fiscal years. Most of the remaining line items in the budget reflect an anticipated 3% increase for inflation.

Last fiscal year, our total income was \$XXX,XXX.XX. If we are able to balance our budget this year, we need to increase our income by \$XX,XXX.XX. It is my hope that we will be able to increase this income largely through this year's annual appeal. **I personally ask** for your most generous support of our Annual Appeal and that you consider increasing your support from last year. A significant number of parishioners do not contribute to this appeal. If you have not contributed in the past, I ask that you do so this year so that we can continue to provide the services you need as parishioners. It is important for **every parishioner** to support this endeavor. As I have noted before, I love being pastor here at Saint XXXXXX Parish and I appreciate all the various means of support offered by you, the parishioners. My prayer is that we all may steadily grow in faith and love as we continue the work of Christ and His Church. God bless you.

Sincerely yours,

Rev. XXXXXX XXXXXXXXXXXX
Pastor

Exhibit A

Saint Paul Parish Budget FY08 July 1, 2007 – June 30, 2008

Employee Salaries, Compensation and Benefits	340,000.00
Clergy Stipend, Insurance and Benefits	85,000.00
Pamphlets, Missalettes, Religious Ed. Books	17,000.00
Office, Supplies, Equipment, and Related Expenses	45,000.00
Household	20,000.00
Utilities, Phone, Heat, Water	35,000.00
Property Insurance	13,000.00
Property/Grounds/Building Maintenance and Supplies	60,000.00
Charitable Works/Gifts	43,000.00*
Pastoral/Liturgical/Rel. Ed./Youth Ministry Activities	60,000.00
Capital Improvements/Buildings and Equipment	100,000.00
Transfer to School	50,000.00
Miscellaneous/Other Expenses	5,000.00
Total	873,000.00

* Part of our charitable works include monthly support of four financially challenged inner city parishes, in addition to support of the annual major fundraising campaign for Blessed John XXIII Seminary in Weston where one of our parishioners is preparing for ordination to the priesthood.

(Over)

Exhibit B

Capital Improvements to Parish Buildings and Property for FY 2005 -2008

- Installation of a new church heating system
- Replacement of the parish hall roof
- Installation of new ceiling in the parish hall
- Repair and painting of parish hall walls and windows
- Replacement of rectory front porch railings and support columns
- Replacement and repair of rectory gutters, downspouts, and chimneys
- Re-pointing and partial replacement of brick steps at the church and rectory
- Numerous masonry repairs to the walkways around the church
- Painting of the wood trim around the doors and windows of the church
- Painting of the exterior of the rectory along with replacement of wood trim where required
- Replacement of the flat roof on the rectory
- Replacement of the rectory boiler, hot water and cooling systems
- Replacement of the parish hall boiler
- Reconfiguration and reconstruction of two first floor rooms in the rectory
- Replacement of the bell tower roofs and flashing
- Repair and repainting of balcony walls and ceilings
- Replacement and refinishing of flooring in the hall, church sacristy and basement rooms
- Painting and repair of walls, wood trim, and ceilings of the church sacristy and chapel
- Painting of parish office areas and replacement of window coverings
- Repairs and plumbing system updating to several rectory rooms
- Installation of a new integrated telephone system for the parish buildings
- Continued masonry work throughout the parish property

August XX, 2008

Dear Friends:

I am writing to you to provide our annual parish income and expenses financial report for the fiscal year July 2007 through June 2008 (FY08).

Last year saw an increase in expenses due in large part to increased parish salaries and benefits, and increased utility and heating costs. Our snow plowing, removal and clean-up costs alone were nearly \$XX,XXX.XX. Capital expenditure improvements included restoration of the bell tower roof, plaster repairs and painting in the church balcony, sacristy, chapel, and parish offices, along with replacing of the flooring in the sacristy and lower church meeting rooms. Also, a new integrated phone system was installed in all the parish buildings. As you can appreciate, in order for us to maintain our parish properties, we are continually facing such expenditures.

For your review, I have included on the back of this letter a summary report of our parish income and expenses from the past fiscal year. If you have any questions about a particular item, please feel free to contact me. Last fiscal year, our parish revenue amounted to \$XXX,XXX.XX. Our parish expenses (not including the school) totaled \$XXX,XXX.XX. We were able to pay all our bills with no outstanding debts. As you can see, we had a small deficit of \$XXX,XXX.XX which was made up through our parish savings. This was a great improvement over last year when our deficit was \$XX,XXX.XX. All things considered, we have managed well this year thanks to your generosity and the fine work of our parish staff.

Next month, I will be writing to you again relative to our parish grand annual appeal. At that time, in coordination with our parish finance council, I will provide a fiscal year budget for July 2008 through June 2009. You will be able to more clearly see the financial requirements of the parish. Already, this new fiscal year, capital improvements have begun. I am sure that you can appreciate that expenses are increasing in all areas of parish life.

As pastor, I take my fiscal responsibilities seriously as you should expect. Part of that responsibility, in cooperation with the parish finance council and parish staff, is to insure that parishioners are informed of the financial status of the parish and are confident that monies are well spent and that programs and properties are well maintained. As I noted in my report to you last year, a parish can neither be judged by the funds that it raises nor the money it spends. However, we must recognize our obligation to share our time, talent, and treasure in a fiscally responsible manner.

May God continue to bless you and your loved ones during the remainder of these summer days.

Sincerely yours,

Rev. XXXXXX XXXXXXXXXXXX
Pastor

Income Statement – July 2007 through June 2008 FY 08

Income	
Offertory and Monthly	498,000.00
Grand Annual	210,000.00
Sacramental Offerings	15,000.00
Promise for Tomorrow Income	10,000.00
Gifts and Bequests	8,000.00
Religious Education and Youth Ministry	50,000.00*
Interest/Dividend Income	30,000.00
Transfer from School	15,000.00
Other Income	20,000.00
 Total Income	 856,000.00
 Expenses	
Employee Salaries, Compensation and Benefits	340,000.00
Clergy Stipend, Insurance and Benefits	95,000.00
Pamphlets, Missalettes, Religious Ed. Books	6,000.00
Office, Supplies, Equipment, and Related Expenses	45,000.00
Household	25,000.00
Utilities, Phone, Heat, Water	45,000.00
Property Insurance	10,000.00
Property/Grounds/Building Maintenance and Supplies	85,000.00
Charitable Works/Gifts	35,000.00
Pastoral/Liturgical/Rel. Ed./Youth Ministry Activities	35,000.00
Capital Improvements/Buildings and Equipment	70,000.00
Transfer to School	50,000.00
Miscellaneous/Other Expenses	17,000.00
 Total Expenses	 858,000.00
 Net Income	 -2,000.00

September XX, 2008

Dear Friends:

This year our Parish Annual Appeal will be held on the weekend of October 4-5. We rely on the Annual Appeal as well as the weekly and monthly offerings to cover the operating expenses of the parish.

Last month, I wrote you and provided our annual parish income and expenses report for the fiscal year July 2007 through June 2008 (FY08). At that time, I informed you that I would be writing to you again relative to our parish annual appeal, providing a fiscal year budget for July 2008 through June 2009. **The budget is included on the reverse side of this letter and amounts to \$XXX,XXX.XX.** The largest element of the budget is salaries and benefits and reflects actual costs for this fiscal year. In order to maintain the liturgical, spiritual, and religious educational life of our parish we require the services of 19 full and part-time clerical and lay employees. The line item for capital improvements and equipment includes replacement of the flooring in the parish offices, various masonry repairs, and partial replacement of the building windows which date back to 19XX. Also, the line item that includes heating costs had to be adjusted from last year to compensate for obvious fuel cost increases. Most of the remaining line items in the budget reflect an anticipated 5% increase for inflation.

Last fiscal year, our total income was \$XXX,XXX.XX. If we are able to balance our budget this year, we need to increase our income by \$XX,XXX.XX. It is my hope that we will be able to increase this income largely through this year's annual appeal. **I personally ask** for your most generous support of our Annual Appeal and that you consider increasing your support from last year. Last year when I wrote to you, your response to the Appeal was greater than ever, a total of \$XXX,XXX.XX. However, a significant number of parishioners still do not contribute to this appeal. If you have not contributed to the appeal in the past, I ask that you do so this year so that we can continue to provide the services you need as parishioners. It is important for **every parishioner** to support this endeavor. As I note every year, I love being pastor here at Saint XXXXXX Parish and I appreciate all the various means of support offered by you, the parishioners. My prayer is that we all may steadily grow in faith and love as we continue the work of Christ and His Church. God bless you.

Sincerely yours,

Rev. XXXXXX XXXXXXXXXXXX
Pastor

Saint Paul Parish Budget FY09 July 1, 2008 – June 30, 2009

Employee Salaries, Compensation and Benefits	360,000.00
Clergy Stipend, Insurance and Benefits	100,000.00
Pamphlets, Missalettes, Religious Ed. Books	18,000.00
Office, Supplies, Equipment, and Related Expenses	47,000.00
Household	25,000.00
Utilities, Phone, Heat, Water	50,000.00
Property Insurance	12,000.00
Property/Grounds/Building Maintenance and Supplies	65,000.00
Charitable Works/Gifts	35,000.00*
Pastoral/Liturgical/Rel. Ed./Youth Ministry Activities	38,000.00
Capital Improvements/Buildings and Equipment	68,000.00
Transfer to School	50,000.00
Miscellaneous/Other Expenses	5,000.00
Total	873,000.00

* Part of our charitable works include monthly support of four financially challenged inner city parishes, in addition to support of the annual major fundraising campaign for Blessed John XXIII Seminary in Weston where one of our parishioners is preparing for ordination to the priesthood.

July XX, 2009

Dear Friends:

I am writing to you to provide our annual parish income and expenses financial report for the fiscal year July 2008 through June 2009 (FY09).

In difficult economic times, we are all required to watch our expenses. At St. XXXXXXXXX we have done our best to control the ever increasing cost of running a parish. This past year we were able to reduce our overall expenses by approximately \$X,XXX.XX from the previous fiscal year even though salaries, benefits and other costs beyond our control increased. Due to the harsh winter, our snow plowing, removal and clean-up costs alone were nearly \$XX,XXX.XX. Equipment expenditures and improvements included new telephone equipment and office computers in the parish offices. In order for us to maintain our parish properties, we are continually facing such expenditures, while cognizant of our responsibility to live within our means.

For your review, I have included on the back of this letter a summary report of our parish income and expenses from the past year. If you have any questions about a particular item, please feel free to contact me. Last fiscal year, our parish revenue amounted to \$XXX,XXX.XX. Our parish expenses (not including the school) totaled \$XXX,XXX.XX. We were able to pay all our bills with no outstanding debts. As you can see, we had a net income of \$XXX,XXX.XX. However, as you will note on the back of this page, this figure is due largely to a bequest from a parishioner in the amount of \$XX,XXX.XX which is legally restricted for use according to the terms of the bequest as noted on the back page. If we had not received the bequest we still would have had a positive net income of \$XX,XXX.XX. This is good since the two previous fiscal years showed a deficit.

Next month, I will be writing to you again relative to our parish grand annual appeal. At that time, in coordination with our parish finance council, I will provide a fiscal year budget for July 2009 through June 2010. You will be able to more clearly see the program, facilities, and financial requirements of the parish.

As pastor, I take my fiscal responsibilities seriously as you should expect. Part of that responsibility, in cooperation with our parish finance council and parish staff, is to insure that parishioners are informed of the financial status of the parish and are confident that monies are well spent and that programs and properties are well maintained. As I always note each year, a parish can neither be judged by the funds that it raises nor the money it spends. However, we must recognize our obligation to share our time, talent, and treasure in a fiscally responsible and transparent manner.

May God continue to bless you and your loved ones during the remainder of these summer days.

Sincerely yours,

Rev. XXXXXX XXXXXXXXXX
Pastor

Income Statement – July 2008 through June 2009 FY 09

Income	
Offertory and Monthly	500,000.00
Grand Annual	150,000.00
Sacramental Offerings	15,000.00
Promise for Tomorrow Income	500.00
Gifts and Bequests	110,000.00*
Religious Education and Youth Ministry	60,000.00
Interest/Dividend Income	25,000.00
Transfer from School/PTA	6,000.00
Fundraising Activities	20,000.00**
Other Income	15,000.00
 Total Income	 901,500.00
 Expenses	
Employee Salaries, Compensation and Benefits	350,000.00
Clergy Stipend, Insurance and Benefits	95,000.00
Pamphlets, Missalettes, Religious Ed. Books	25,000.00
Office, Supplies, Equipment, and Related Expenses	40,000.00
Household	20,000.00
Utilities, Phone, Heat, Water	50,000.00
Property Insurance	10,000.00
Property/Grounds/Building Maintenance and Supplies	90,000.00
Charitable Works/Gifts	30,000.00
Pastoral/Liturgical/Rel. Ed./Youth Ministry Activities	60,000.00
Capital Improvements/Buildings and Equipment	10,000.00
Transfer to School	50,000.00
Miscellaneous/Other Expenses	15,000.00
 Total Expenses	 845,000.00
 Net Income	 56,500.00

* This amount includes an \$XX,XXX.XX bequest from a former parishioner, XXXX XXXXXX, which is restricted for use only on parish buildings and property repairs and cannot be used for salaries, utilities, or the regular daily operating expenses of the parish.

** This amount includes \$XX,XXX.XX which we received as the 25% share of the Archdiocesan Annual Appeal overgoal amount given by St. XXXXXX parishioners in the 2008 Archdiocesan Appeal.

*** The actual net income for the fiscal year less the restricted bequest is \$XX,XXX.XX