



# **The Catholic Foundation**

## *Fundraising Forum on Strengthening Parish Grand Annuals*

*Scot Landry*

June 17, 2010

# Strengthening Grand Annuals

## Key Points

- Grand Annuals are critical to the funding of the mission of a majority of the parishes in the Archdiocese of Boston.
- Where they are most successful, 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.



# Strengthening Grand Annuals

## Discussion Topics

- **10 Successful Grand Annual Practices** – *Scot Landry*
  - Determined from interviews with pastors in 2009
- **Anatomy of an actual successful GA campaign** – *Tom Wilson*
  - Examples from Immaculate Conception Malden (Fr. Mehm, Pastor)
- **Review of other GA resources provided to you** – *Scot Landry*
- **Discussion/Q&A** - *All*



# Strengthening Grand Annuals

## What are Grand Annual contributions?

- In FY07, parishioners contributed **\$13.8MM** in Grand Annual collections across all archdiocesan parishes.

Total RCAB Grand Annual FY07	
# Parishes	215
Highest Grand Annual	\$416,241
Average Grand Annual	\$63,950
Median Grand Annual	\$47,441
Lowest Grand Annual	\$250
<i>Source: Scot Landry, Unofficial Results</i>	

Grand Annual Breakdown	
Amount	# Parishes
>\$400,000	2
\$350,000-399,999	0
\$300,000-349,999	1
\$250,000-299,999	0
\$200,000-249,999	4
\$150,000-199,999	8
\$100,000-149,999	18
\$75,000-99,999	28
\$50,000-74,999	44
\$25,000-49,999	57
<\$25,000	53
No Grand Annual	79
<i>Source: Scot Landry, Unofficial Results</i>	



# Strengthening Grand Annuals

## #1. Send a personalized letter

### 1. Send a personalized letter to all families.

- Hand-signed letters increase success in the Grand Annual and improve the connection parishioners feel with the parish.
- Makes the GA a “campaign” instead of just a “collection”
- Include a pledge card, return envelope and a budget (or reference to the annual report that was recently shared).

### Notes:

- 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.



# Strengthening Grand Annuals

## Quotes from Pastors on #1

- *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.”*



# Strengthening Grand Annuals

## #2. Personalize the request amount

### 2. Personalize the requested gift amount based on parishioners' previous support.

- Personalization of pledge cards increases success. State what was given by the family in previous years on the pledge card.
- Ask families to prayerfully consider increase from previous gift. Ask them to be as generous as their means allow.
- Suggest a “general” norm in a good tone. Make it 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”.



# Strengthening Grand Annuals

## Quotes from Pastors on #2

- **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.”*





# Strengthening Grand Annuals

## #3. Publish Annual Report Prior to GA

### 3. Publish annual report about 1 month prior to the GA.

- Annual reports build trust via better transparency & accountability.
- Detail parish ministries and gifts of prayer & service – the length and depth can vary according to the parish.
- This is a great time to do stewardship commitment/renewal.
- 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.
- Have copies available in church/bulletin and/or mail to all registered households.



# Strengthening Grand Annuals

## Quotes from Pastors on #3

- *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.”*



# Strengthening Grand Annuals

## #4. Send Follow-up Letters

### 4. Send follow-up letters

- Followup / Reminder letters are essential to all fundraising campaigns.
- Mail about 1-2 months after the launch to families who have yet to give.
- Followup letters are often shorter than the initial letters. They can serve as a simple reminder to the parishioners.
- Personalization increases gifts and gift amounts in the follow-up letters too.



# Strengthening Grand Annuals

## Quotes from Pastors on #4

- **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.”*



# Strengthening Grand Annuals

## 5. State the Goal & Previous Impact

5. **State the GA need/goal & show impact of past GA gifts**
  - Visually show 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.



# Strengthening Grand Annuals

## Quotes from Pastors on #5

- **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.”*



# Strengthening Grand Annuals

## 6. Enable Parishioners to Pledge

### 6. Enable parishioners to pledge

- Allows multiple payments and often results in higher overall gifts.
- Some families will “stretch” because they can do more over a period of months.
- Other families can delay payments to a time with more cash flow.

#### Note:

- Build in a process for sending out pledge reminders.
- This will increase costs slightly, but the added costs are justified by the increased overall gifts to the GA.



# Strengthening Grand Annuals

## Quote from a Pastor on #6

- *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.”*





# Strengthening Grand Annuals

## 7. Thank Parishioners Quickly + Often

### 7. Thank parishioners immediately and frequently.

- Everyone likes to feel appreciated, personally and as a group..
- Send personalized thank you notes quickly. Hand-signed is best. Great and quick thank yous show that the parish takes the campaign seriously, is professional, and is thankful.
- Regularly show appreciation:
  - s 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).



# Strengthening Grand Annuals

## Quotes from Pastors on #7

- *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."*



# Strengthening Grand Annuals

## Quotes from Pastors on #7

- *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.”*



# Strengthening Grand Annuals

## 8. Utilize a Consulting Firm

### **8. Employ the services of an approved professional fundraising firm to execute the grand annual.**

- This is a great return on your parish's investment.
- They have valuable experience and knowledge of what works across many parishes.
- Takes burden off parish staff for mailing, processing, reporting, database updating and follow-up letters.
- 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.



# Strengthening Grand Annuals

## Quotes from Pastors on #8

- **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.”*



# Strengthening Grand Annuals

## Quotes from Pastors on #8

- **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.”*



# Strengthening Grand Annuals

## 9. Communicate the Parish's Priorities

### 9. Communicate the parish's overall goals/priorities

- 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. Success breeds success. People want to support thriving organizations with high standards and great results.
- With your lay leaders/parish councils, pick a few goals that focus on growing the parish.
- Don't assume everyone knows everything the parish is doing.
- Investments in excellent faith formation for the children (religious ed, family mass, schools) generates wide support, typically.



# Strengthening Grand Annuals

## Quotes from Pastors on #9

- **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.”*





# Strengthening Grand Annuals

## 10. Reinforce the GA Campaign

### 10. Reinforce GA with frequent church & bulletin mentions.

- Weekly thank people for their gifts and encourage participation of all families.
- 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. Or show a “thermometer” to demonstrate progress against financial and participation goals.



# Strengthening Grand Annuals

## Quotes from Pastors on #10

- **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.”*



# Strengthening Grand Annuals

## Tom Wilson



- Tom is a Senior Vice President of Letter Concepts
- Letter Concepts is a leading Catholic fundraising consultant for dioceses and parishes
- The Catholic Foundation selected Letter Concepts to be our direct mail partner for the Catholic Appeal from 2008-present.
- Letter Concepts has helped many parishes in the Archdiocese with increased offertory campaigns & grand annuals.

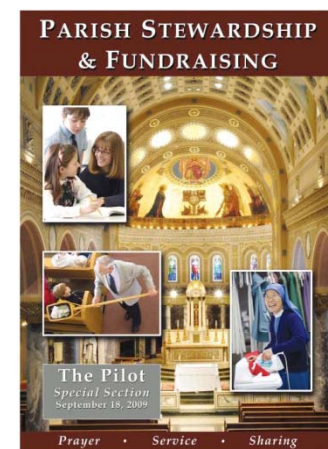
*Tom will now present timelines and materials of successful grand annual campaigns.*



# Strengthening Grand Annuals

## Additional Resources

1. Grand Annual section on **ParishFundraisingBlog.com**.
2. Articles on Grand Annuals in your folder, taken from the Parish Stewardship & Fundraising guide in *The Pilot*.
3. Parish Annual Report presentation from Nov 2007.
4. Example GA packets from 2 parishes.



# Strengthening Grand Annuals

## Questions/Discussion



# The Catholic Foundation Staff

## Thank you for your support



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*Manager – Gift Processing*  
Since 2007



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Since 1998



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