

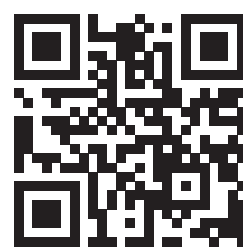
ENCOUNTERING CHRIST

# FAITH IN ACTION



*Diocese of  
San Jose*  
**ADA 2020**  
ANNUAL DIOCESAN APPEAL

[www.dsj.org/ada](http://www.dsj.org/ada)



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To Give

***Know Him. Love Him. Serve Him.***

**DIOCESE OF SAN JOSE  
ANNUAL DIOCESAN APPEAL  
RESOURCE MANUAL 2020**

# **DIOCESE OF SAN JOSE ANNUAL DIOCESAN APPEAL RESOURCE MANUAL 2020**

## **CONTENTS**

- Section 1- ADA Campaign
- Section 2- Pastor & Chairperson
- Section 3- Gift Processor
- Section 4- Follow up Information
- Section 5- Additional Resources



# **DIOCESE OF SAN JOSE, CA 2020 ANNUAL DIOCESAN APPEAL MASTER CALENDAR**

*Parish Active Phase is February 8/9 through April 5, 2020*

## **JANUARY 2020**

- 20 Martin Luther King Holiday –Chancery Office Closed
- 22 Gift Processor Training 10:00 a.m. – noon
- 23 Parish Kits with In Pew Supplies delivered to Parishes
- 24 Campaign Mailing ships
- 28 Gift Processor Training 6:30 pm - 8:00 pm

## **FEBRUARY 2020**

- 1 Campaign Mailing delivered to parishioners
- 1 - 2 Pre-Pledge Weekend
- 8 - 9 Pledge Weekend (Kick-Off)
- 11 First Courier (Tuesday)
- 17 President's Day Holiday – Chancery Office Closed
- 18 First Report to Parishes
- 18 Second Courier
- 24 Second Report to Parishes
- 25 Third Courier

## **MARCH 2020**

- 2 Third Report to Parishes
- 2 Follow Up Email Blast from the Bishop to those who have not yet donated
- 3 Fourth Courier
- 9 Fourth Report to Parishes
- 10 Fifth Courier
- 16 Fifth Report to Parishes
- 17 Sixth Courier
- 23 Sixth Report to Parishes
- 23 Second Mailings delivered to donors
- 24 Seventh Courier
- 30 Seventh Report to Parishes
- 31 Cesar Chavez Holiday – Chancery Office Closed

## **APRIL 2020**

- 1 Eighth Courier
- 6 Eighth Report to Parishes
- 6-10 Holy Week
- 7 Courier by request only
- 10 Good Friday Holiday – Chancery Office Closed
- 12 Easter
- 13 Easter Monday Holiday – Chancery Office Closed
- 14 Ninth Report to Parishes – Final Weekly Report

## **MAY 2020**

- 6 First Monthly Report to Parishes
- 27 Memorial Day Holiday – Chancery Office Closed

## **JUNE 2020**

- 6 Second Monthly Report to Parishes

Major Donor Receptions – To Be Determined  
ADA Volunteer Luncheon Reception – To Be Determined

# THE ADA 2020 CAMPAIGN

The ADA Steering Committee has identified the following standards as essential in conducting a successful ADA Campaign. These procedures are to be implemented during the Active Phase. Instructions on how to complete each of these steps as well as sample letters, phone-a-thon scripts, pulpit announcements, bulletin inserts, etc. can be found in the following pages of this manual.

1. Direct Mail: The ADA office sends a mailing to registered parishioners. The mailing includes:
  - a. Letter from the pastor, provided to the ADA office
  - b. Appeal brochure; includes Bishop Cantú's letter
  - c. Personalized ADA pledge form to be returned or mailed to the parish
  - d. Buckslip introducing the new Sustaining Gifts program
2. In-Pew: Use the "In-Pew" method of fund-raising preferably for the 1st and 2nd week of the Appeal – "ADA Pre-Pledge & Pledge Weekends." This means having blank pledge forms and return envelopes in all of the pews during all of the masses, and the pastor referencing them and encouraging parishioners to fill them out during mass.
3. Announcements: The Pastor and ADA Chairperson need to visibly and vocally support **Encountering Christ, Faith in Action**. Pulpit announcements should be made each week of the Active Phase. An update on the pledge totals and participation levels to date should be included in each weekly pulpit announcement and included in the bulletin. In addition, the ADA office will provide Diocesan speakers or a Bishop's ADA Video appeal to promote the campaign upon request.
4. Tabling: Employ "Tables after Mass" at least every other weekend of the Active Phase. This means a table with ADA materials should be staffed with volunteers who can speak intelligently and positively about the ADA Campaign and what it funds. An announcement about the table should be made after each Mass. The volunteer(s) should be at the table before Mass is over – preferably before the end of Communion to catch those who may leave Mass early. The volunteers should stand out in front of the table to initiate conversation and greet people. Passively sitting behind the table defeats the purpose of "Tables-At-Mass."
5. Second Mailings: Second mailings remind parishioners who have not yet donated the importance of **Encountering Christ, Faith in Action** both to the Diocese and to the Parish. The Office of Stewardship and Development will work with the parish to prepare the second mailing.
6. Phone Calls: Phone calls are a great way to reach out to parishioners. Peer-to-peer, parishioner-to-parishioner, works best. "I am supporting Encountering Christ, Faith in Action this year and here is why: Will you consider doing the same?" Phone calls promote support for the ADA and provide a forum for dialogue about the campaign, and about other happenings at the parish.

7. Goals: Although the Diocesan Leadership Team sets the official goal each year, many parishes establish a Parish Goal and add it to the Diocesan Goal. Each parish should develop a case for the goal that clearly identifies the ADA with a local parish need. The case should appear in both the pastor's letter and the weekly parish bulletin inserts.
8. Following-Up: Designate a Follow-Up Administrator to complete the duties and responsibilities designated in the Follow-Up chapter to ensure a successful redemption/fulfillment of pledges and database maintenance. Many parishioners pledge with the best of intentions but cannot always follow-up on those pledges. Following-up with them to see how they are doing, above and beyond making pledge payments, is a much-appreciated ministry. The Follow-Up chapter has more information on this.
9. Make it Public: Post the thermometer in the church vestibule area that shows both the amount pledged and the level of participation. It takes everyone in the parish to make the ADA a success and the success should be publically visible.
10. Thank-You's and Acknowledgements: Parishes may want to consider sending thank-you letters from the parish to ADA donors in addition to the diocesan thank-you letters that are produced. This will help to reinforce the thankfulness of the parish for the gift and foster future donations.

### **Increasing Your ADA Mailing List**

When the ADA Office pulls the ADA mailing list from your parish data, we select families **who are both Registered *and* are in the Active family group**. To this, we add families that were contributors to your last ADA campaign even if they were not registered/active.

We are seeing many Family Groups like “Contributor Only” or “Sacraments Only” that are not included your ADA mailing list. It is a best practice to periodically review your family group usage to make sure you don't have active families in other family groups. Across the entire Diocese there are more than 5,000 registered families are not getting a pledge card since they are not in the “Active” family group.

It might also be worth reviewing your unregistered families in some family groups too. It is possible that you have some families that are actually active or contributing to the parish and they don't realize they are not registered. Please contact the ADA office for additional information on family groups in ParishSOFT.

## ADA PLEDGE FACTS

Please remember the following when asking for and accepting a pledge or gift:

- Donations may be made online at [www.dsj.org](http://www.dsj.org). Follow the ADA links to our secured on-line giving site.
- Donations can be made via check, donated securities, credit card and direct debit
- Sustained Giving a new option of donating, no more filling out pledge forms year after year sign up one time and your giving will renew each year automatically.
- Pledges can be paid monthly (up to 10 payments) or as a one-time gift. All pledges must be completed by December 31<sup>st</sup>. A down payment is not necessary.
- Pledges may be paid monthly via credit card (up to 10 payments) or through direct debit. To do so, please fill out the necessary credit card or EFT information on **the pledge form**.
- Payment reminders and return envelopes will be automatically sent if a donor chooses to make a pledge. Reminders are not sent to those paying with their checking account or with a credit card.
- One-time gifts are graciously accepted.
- Any household interested in making a donation via stock, annuities, property, wills, trusts, life insurance, etc., should contact the ADA Campaign Office at (408) 983-0293. This information is also available on-line.
- All pledges must be completed by December 31, 2020
- All contributions to the Annual Diocesan Appeal are fully tax deductible.
- Over 50% of overall revenues for the Diocese of San Jose come from ADA donations.
- Every dollar a parish raises over their goal is rebated 100% back to the parish. This is an incentive to exceed your parish goal. Explaining what the parish plans to do with this 'extra' money will entice parishioners to give.

For more information on the ADA in your parish, please refer to the ADA brochure; or contact the ADA Office at 408-983-0292.



# WHY THE ADA IS IMPORTANT

## 1. What is the Annual Diocesan Appeal (ADA) and why do we have it?

The Annual Diocesan Appeal (ADA) is the annual invitation to the people of the Diocese of San Jose to participate in and support common services and programs of our local Church. Each year, the 53 parishes and missions of our local Church take part in the ADA to raise funds for the support of centralized services, ministries, activities and programs of the Diocese of San Jose.

## 2. How does my parish benefit from the ADA?

More than 50% of all diocesan revenues come from the funds raised during the ADA. These funds support common services and programs for all our parishes. These include:

- **Clergy**
  - Formation and Education for Priests, Deacons and Seminarians
- **Stewardship and Development, Communications Services**
  - ParishSoft
  - Valley Catholic
- **Office for Evangelization**
  - Faith Formation
  - Institute for Leadership in Ministry (ILM)
  - Restorative Ministry
  - Youth and Young Adult
  - Hispanic Apostolate
  - Family Life and Spirituality
  - Deaf Ministry
  - Liturgy
  - Social Justice
- **Parish Services**
  - Technology Services
  - HR Support Services
- **Tribunal**
- **Department of Catholic Schools**
  - Elementary School Tuition Assistance

## 3. Why doesn't the Diocese of San Jose have enough money?

The Diocese has few unrestricted cash reserves. Most of its reserves have been restricted by donors or parishes. For example, our endowment to provide scholarships for children to attend Catholic schools can only be used for that purpose. Likewise, parishes have funds on account at the Chancery, but these funds are restricted for the use by those parishes only.

Annually, the Chancery budgets for the following year's expenses. This budget is a frugal projection of needs for the coming year. On a year-to-year basis we try to balance expenses with the income we receive from the ADA, the parish assessment and various

other small sources of income. More than 50% of diocesan revenues come from the ADA.

**4. Does my parish receive any of my ADA contribution?**

Each parish receives every dollar collected above its assigned goal. These ADA rebates are returned directly to your parish at scheduled intervals after the parish's diocesan goal has been met.

**5. Do ADA contributions go outside of the Diocese?**

ADA contributions are primarily used to support our local Church here in Santa Clara County.

**6. How much money will be rebated to parishes in the last ADA?**

More than \$ 2.5 Million dollars will be rebated to parishes from ADA 2019. The parishes that have collected more than their assigned goal will have 100% of their excess contributions returned to the parish. The amount of rebates often depends upon the parishes' follow-up plan and attention throughout the year.

**7. Do our ADA contributions support implementation of the Pastoral Plan?**

In the Diocesan Pastoral Plan promulgated by Bishop McGrath, three key pastoral issues are mentioned: Lay Leadership, Youth and Young Adults, and Social Justice Teaching of the Catholic Church. The ADA is the main source of revenue for the support of these and many other components of the Pastoral Plan. The ongoing, annual work to implement the pastoral plan now comes from the annual budget.

**8. What are the key pastoral needs supported by the ADA?**

- There are critical pastoral issues recognized in the Pastoral Plan whose initiatives are funded by the ADA.
- We are fortunate to have seen an increase in the number of seminarians who are educated and trained through the support of the ADA. Currently 10 seminarians, representing the Diocese of San Jose attend Mundelein Seminary.
- The Department of Evangelization provides a wide variety of ministries and services that directly support parish life including:
  - Faith Formation
  - Institute for Leadership in Ministry (ILM)
  - Restorative Ministry
  - Youth and Young Adult
  - Hispanic Apostolate
  - Liturgy

**9. How many people contribute to the ADA?**

During the past three years more than 21,000 people contributed each year to the Annual Diocesan Appeal.

**10. What is the amount of the average ADA contribution?**

The average contribution to the ADA in 2019 was \$462; this amount continues to increase each year.

**11. Can I give electronically?**

Yes, there are many convenient ways of giving electronically. You can go to our website, [www.dsj.org](http://www.dsj.org) and click on “Ways to Give” and follow the link to our secure Online Giving site to donate online to the ADA. For your convenience you can also donate using your Visa, MasterCard or Discover. Electronic giving is available for sustaining gifts, one-time gifts as well as monthly, bi-monthly or quarterly payments.

The most cost effective is a direct debit out of a checking or savings account because this allows the Diocese to receive 100% of your contribution (no credit card fees).

**12. Is my ADA contribution used to pay attorney fees or judgments in sexual misconduct cases?**

All ADA contributions are used to fund the programs, services and ministries of the Diocese of San Jose. Our Diocese has had few instances of sexual abuse by clergy and our liability insurance carrier has covered those costs. Of course, we do have to pay premiums on our liability insurance program. However, this is a cost that we have always paid. As a Diocese we have over 2,500 employees working in over 90 parishes, school and other facility locations. Like any organization our size, we have and must continue to provide liability insurance coverage.

**13. How is the parish Annual Diocesan Appeal goal set?**

This year a Bishop’s ADA Consultation Committee used the goal-setting formula that was approved by the pastors. Included was a 5-year collection of data used for each parish based upon the average parish ordinary income.

**14. How much does it cost to run the Annual Appeal?**

The Annual Diocesan Appeal Office spends less than 6% of the diocesan goal to run the ADA. This includes the office staff, the printing of the ADA materials, training and all other related expenses. All processing will be completed at the ADA Office of the Diocese.

**15. What happens if a parish cannot make their goal?**

If the parish does not make its assigned diocesan goal, the parish may ask for a review by the ADA Steering Committee at the end of the 9 weeks. At this review, there will be a discussion on the follow-up plans and any recommendations. Parishes not pledging over the diocesan goal by the end of the 9<sup>th</sup> week and who do not wish to have a review, are asked to guarantee their goal.

# **PASTOR AND CHAIRPERSON**

## **PASTOR LEADERSHIP RESPONSIBILITIES SUMMARY**

The single most important key to a successful Annual Diocesan Appeal is the strong and enthusiastic support of the Pastor. The Pastor who is positive increases the possibility of a successful Appeal. As a person of faith and as a leader of the parish, your personal plea to the people of your parish is the key element.

You are the principal motivator. No brochure, letter, insert or other item can replace the impact of your personal support. You are the spiritual leader of the parish and your involvement is essential. Any negative comment made to a group or individual can affect the appeal.

Make your parishioners aware during the Masses on Appeal weekend that you have donated to and support the Annual Diocesan Appeal.

The Diocese of San Jose and each parish needs the financial help of all Catholics. But more important is the fact that all Catholics have a need to give and a need to share their time, talents, and financial gifts with their parish and with the wider Church of which they are members. This need to give is as great as or greater than the programs and services they benefit.

All of us are counting on those who have received and are continuing to receive gifts from God to return a portion to their Church.

Please talk about the goal of 100% participation. Ask every household to consider a gift to the Annual Diocesan Appeal, remembering, no gift is too small. Everyone is invited to participate!

It is essential then that you, the pastor take a leading role in the ADA in your parish, just as you take a leading role in other efforts. Public support and enthusiasm from you for the ADA will encourage parishioners and volunteers to make the campaign a success.

Your responsibilities are:

- To lead the ADA Campaign in your parish.
- To encourage intelligent, organized, responsible individuals to accept the lay leadership roles of the ADA Chairperson, ADA Gift Processor and ADA Follow-Up Administrator for your parish.
- To work with the ADA Chairperson to ensure that the minimum standards set by the ADA Steering Committee are met.
- To assist the ADA Chairperson in selecting other campaign workers.
- To discuss the diocesan programs and needs, the parish goal and the reasons for the parish ADA campaign at all Masses on “ADA Pledge Weekend.”
- To make announcements from the pulpit during the 8 weeks as a thank-you and to update the parishioners on the success of the Appeal

- To publish the results and needs in the bulletin each week.
- Pray for the success and ministries supported by the ADA in the Prayers of the Faithful
- To make the ADA Campaign information available to parishioners via direct mailings, tables at mass, extra materials in the church vestibule area, etc.
- To accept ADA gifts and pledges and make office facilities at the parish available for the processing of ADA gifts and pledges.
- To ensure a high level of participation in the parish in order to attain the ADA goal.

## **ADA CHAIRPERSON LEADERSHIP RESPONSIBILITIES**

- To provide the visible and vocal leadership for the ADA Campaign in cooperation with the pastor, ADA Gift Processor and other campaign workers.
- To work with the pastor to ensure that the minimum standards set by the ADA Steering Committee are met.
- To manage the work of the parish volunteers who will assist the administering of the ADA campaign.
- To direct the distribution of ADA materials to support the campaign via direct mailings, tables at mass, extra materials in the church vestibule area, etc.
- To discuss the diocesan programs and needs, the parish goal and the reasons for the parish ADA campaign at all Masses on “ADA Pre-Pledge Weekend.”
- To structure the logistics of the parish ADA Campaign to permit parishioners to make their pledges in an easy and efficient manner.
- To ensure a high level of participation in the parish in order to attain the ADA goal.



# TIPS FOR A SUCCESSFUL CAMPAIGN

- Make your own commitment to the Annual Diocesan Appeal
- Review your parish ADA results from last year, evaluate the approaches that were taken, determine ways to improve results and develop a plan and strategy that will achieve your parish goal
- Involve your YOUTH to participate in the Annual Diocesan Appeal. They are the future Church. The ADA is an opportunity to draw them into responsible participation in the life, mission and work of the Catholic faith community
- Provide advance notice from both the pulpit and parish bulletin so that parishioners are prepared to make a commitment on Appeal weekend
- Exhibit a positive, sincere attitude toward the Appeal, its objective, and the parish's importance to the overall effort
- Give a motivational homily on Appeal (Kick-off) Weekend
- Incorporate the campaign theme in all campaign promotions
- Ask every parishioner to fill out a pledge form in the pew. Emphasize how important their gift is to the success of the campaign
- Show the ADA Video on at least two weekends
- **THANK EVERYONE!**

## DON'T

- Don't apologize for the Annual Diocesan Appeal
- Don't portray this as a chore or just another arduous task - this is an opportunity for the faith community of the Diocese of San Jose to share as one their Time, Talent and Treasure
- Don't assume someone cannot give a gift, No gift is too small
- Don't try to justify the Annual Diocesan Appeal purely in terms of "what's in it for us?" Instead focus on your parishioners' willingness to give as Jesus did, without expecting something in return.

# KEYS TO A SUCCESSFUL CAMPAIGN

*Do you want your parish to have a successful campaign?  
If so, here is how:*

- Thank Everyone! Engage all of your parishioners with a gift of thanks for their generosity and prayer
- A consistent positive attitude of parish leadership is critical
- Let your parishioners know that ADA is a fund drive to help your parish pay their financial assessment to support our larger Church, an obligation of each parish, each year. When you ask for help for your parish the faithful are generous
- Help parishioners understand that their gifts to the ADA positively support their parish. How did your parish utilize your rebate?
- Use examples of the interaction of ministry and services provided through the Annual Diocesan Appeal and your parish.
- Always encourage the partnership of parish and diocesan unity. We can do more together than anyone can do alone
- **Always focus on increasing participation**
- Realize that the fastest way to raise more funds is through major donors
- **Gratitude is essential! Continue to thank everyone!**
- Include a link on your website to [www.dsj.org/ada](http://www.dsj.org/ada). Encourage your parishioners to go here to view the ADA video and donate electronically
- Consider bringing in resources to assist your efforts, place articles in your bulletin of how your parish or someone in your parish is benefitting by the operations and ministries supported by the ADA
- There are always speakers from every ministry and service available to speak to your parish. Maybe your parish has a particular use of one ministry or service and that will help more people understand that we are all one, working together to build this kingdom
- Additional resources are available in the Office of Stewardship and Development. Please call 408 983-0292

## **THE CAMPAIGN PRE-PLEDGE WEEKEND**

1. ADA Chairperson should speak at all Masses -- a layperson's presentation of the ADA campaign and the services, ministries and programs provided to parishes by the Diocese. Please see Chapter 3 of this manual for a sample talk. The ADA brochure and pledge materials should be reviewed prior to the talks, and the ADA Office is always available to discuss what you may like to highlight.
2. A brief outline of the parish solicitation plan and the parish goal (which may be higher than the diocesan assigned goal) is provided to the parishioners, possibly via an announcement in the bulletin, in order that the congregation can be prepared to make a gift/pledge the following weekend -- "Pledge Weekend."

## **PLEDGE WEEKEND**

1. Pastor should speak at all Masses -- a positive and motivational presentation of the ADA campaign and the services, ministries and programs provided to parishes by the Diocese. Please see this section of the manual for a sample talk. Again, the ADA brochure and pledge materials should be reviewed prior to the talks, and the ADA Office is always available to discuss what you may like to highlight.
2. The pastor asks all parishioners to make a financial pledge to the best of their ability in support of the ADA.
3. ADA brochures, pledge forms, and pencils should be available in the pews.
4. Ushers, preferably other priests, should distribute the pledge cards during Mass.
5. Instruct assembly on how to fill out the pledge form, i.e. print name and address, indicate pledge amount, enclose down payment (if any), indicate credit card number or direct debit number with voided check and sign pledge form.
6. Seal completed pledge form in the return envelope that is provided.
7. Ask ushers to collect envelopes.
8. It is important that those unable to make a financial pledge also be asked to complete a pledge form so that your ADA Committee does not have to try to contact them. Those unable to contribute, but who do complete a pledge card, will be asked to pray for the success of the campaign and the prayers will be counted as their pledge.

## SUGGESTED USHERS BRIEFING

To assist parishioners in making a gift to the ADA Campaign at Mass, the following details are important:

Before Mass:

1. Have an ample supply of brochures, pledge forms and pencils in each pew.
2. Make sure ushers (priests preferred, or volunteer workers) are assigned areas for pledge form distribution and collection.

At Mass:

1. Pastor speaks about ADA and asks ushers to distribute pledge forms and pencils.
2. Pastor explains pledge procedure – how to fill out **pledge form**.
3. After allowing time for the completion of pledge forms by assembly, ushers will collect pledge forms.
4. Head usher or the ADA chairperson will bring pledge forms up with gift bearers at Offertory.

After Mass:

1. Head usher or the ADA chairperson will sort through pledge forms, returning blanks to supply for next Mass.
2. Between Masses, remove forms left in pews and replenish pencil supply where needed.

**PLEASE NOTE:** On “Pledge Weekend,” it is necessary that ushers pass out pledge forms and pick them up during the course of the pastor’s presentation. This special procedure and collection during the homily will reinforce the importance of the Appeal.

## PRE-PLEDGE WEEKEND TALK

Suggested Remarks of the ADA Chairperson / Lay Speaker  
(5-10 minutes)

- “I’d like to take a few minutes to talk about the Annual Diocesan Appeal (ADA) Campaign, **Encountering Christ, Faith in Action**. The Annual Diocesan Appeal provides support for the Diocese of San Jose’s common services and programs to the parishes of Santa Clara County. These services insure the vitality and growth of our Church.”
- Introduce yourself and your role in the ADA. Express your own personal history working on behalf of the ADA.
- First, I'd like to update you as to the results of our previous year's ADA drive.  
Last year’s GOAL  
Last year’s PLEDGE TOTAL  
Last year’s TOTAL COLLECTED  
# OF FAMILIES PARTICIPATED  
AVERAGE GIFT  
AMOUNT RETURNED TO PARISHES
- Discuss the past success of the ADA in your parish and your goal for the current year.
- Express confidence in the success of the ADA.
- Everyone in the parish should have received their ADA materials in the mail. This package should have included an ADA brochure, a letter from the pastor, and personalized pledge form. (Bring the ADA brochure and pledge form with you and reference them.) If you did not receive these materials, please be sure to pick up these materials today - they can be found (in the pews or tables outside). Today, I would like to talk to you about this very important ADA.
- Explain why you believe supporting the Annual Diocesan Appeal and the Diocese is important for our parish and every parishioner in it. See the ADA brochure for details on how the ADA supports the ministries and services that reach out to all the parishes.



- The Annual Diocesan Appeal provides support for the Diocese of San Jose's services to the parishes of Santa Clara County. These services insure the vitality and growth of our Church. As responsible disciples and parishioners, we are called to share our many blessings with others. The ADA supports diocesan offices including the Office for Evangelization, Vocations, Missions, the Valley Catholic, Detention Ministry, The Institute for Leadership in Ministry, Vocations, and Elementary School Tuition Assistance. In addition, the ADA provides administrative services to our 53 Catholic parishes and missions of the Diocese of San Jose. The ADA provides more than 50% of all diocesan revenues.
- Review the ministries and programs that benefit your parish in particular (Use ADA brochure and ADA Poster).
- Emphasize that we need the commitment of everyone to reach our ADA goal. As a parish, we are asking each parish household to consider a donation or pledge of \$\_\_\_\_\_ or more payable over a 10-month period. To be completed by December 31<sup>st</sup>. Some will be able to donate more, some less. Regardless of the amount each household is asked to make a one-year pledge to the ADA campaign. Please consider being as generous as you can to this parish wide effort. Also, please keep in mind that every dollar raised over our goal of \$\_\_\_\_\_ is rebated back 100% to the parish.
- As I mentioned earlier, everyone registered with the parish was mailed their ADA materials. Included in the packet is your personalized pledge card. We are asking everyone to please turn in the ADA pledges by next weekend, "ADA Pledge Weekend."
- VERY IMPORTANT: Fr. (insert pastor's name) will be speaking at all of the Masses next weekend, which is our "ADA Pledge Weekend," in order to give you more information on our ADA drive.
- How much you donate is a private decision between your family, yourself and God. However, whatever your decision, it is very important for the success of the Appeal that everyone turn in their pledge form by next weekend. We need to keep our momentum going so that we may reach and exceed our goal over the next month. Pledge forms can be dropped in the offertory basket next weekend, dropped off during the week at the parish office or mailed to the parish. Please be sure to turn your pledge form in by "Commitment Weekend"!
- I will be available after Mass to answer any further questions you may have regarding the ADA and talk with you about your pledge to the Appeal.

# PLEDGE WEEKEND TALK

## *Pastor's Talk (4-5 minutes)*

- I'd like to take a few minutes to talk about the Annual Diocesan Appeal (ADA) Campaign, **Encountering Christ, Faith in Action**.
- Discuss the past success of the ADA campaign in your parish and your goal for the current year.
- Express confidence in the success of the ADA campaign.
- Tie in the support of the ADA to our obligations as stewards of the Church.
- Everyone in the parish should have received their ADA materials in the mail. (Have a sample ADA package with you.) This package should have included an ADA brochure, a letter from me (the pastor), and your personalized pledge form. If you did not receive these materials, please be sure to pick up these materials today - they can be found in the pews in front of you. Today, I would like to talk to you about this very important ADA campaign.
- Express your own personal history working on behalf of the ADA. Explain why you believe supporting the ADA and the diocese is important for our parish and every parishioner in it. See the ADA brochure and poster for details.
- The Annual Diocesan Appeal provides support for the Diocese of San Jose's common services and programs to our 53 Catholic parishes and missions. These services insure the vitality and growth of our Church. As Disciples of Christ we are called to share our many blessings with others. The ADA supports these programs and offices including the Office for Evangelization, Vocations and Seminarian Education, The Institute for Leadership in Ministry, Parish Services, Stewardship and Development, Communications Services, Tribunal and Elementary School Tuition Assistance. The ADA appeal provides over 50% of all diocesan revenues.
- Review the ministries/programs that benefit the parish in particular (Use ADA brochure and poster).
- Emphasize that we need the commitment of everyone to reach our ADA goal. On behalf of the parish, I am asking each parish household to consider a donation or pledge of \$\_\_\_\_\_ or more payable over a 10-month period.
- This weekend is "ADA Appeal / Pledge Weekend." We are asking you (every parishioner) to turn in your pledge today. If you do not have your personalized pledge form with you today, there are pledge forms and brochures in the pews for you.

"I now ask that the ushers distribute pledge forms and pencils to the assembly."  
(Continue to talk while the ushers pass out the materials to the entire assembly.)
- Encourage them to visit [dsj.org/ada](http://dsj.org/ada) to give electronically.

## **FOR IN PEW COMPLETE ENVELOPE ONLY**

- If you take a look at the pledge form with me, we will walk through the process of making a pledge or one-time gift. If you brought your pledge form from home, you will see that your address and phone number are printed on the pledge form. Please verify that your contact information is accurate and make any necessary corrections. When this is complete go ahead and insert the pledge form into the return envelope and seal it.
- If you did not bring your personalized form with you today, we have blank ones available. On the pledge form, please fill in your personal information. If you are enclosing a check please indicate total amount enclosed as well as total amount pledged. Pledges can be made over a 10-month period; you do not have to pay this amount today! Checks should be made payable to the Annual Diocesan Appeal.
- Sustained Giving a new option of donating, no more filling out pledge forms year after year sign up one time and your giving will renew each year automatically.
- If you are paying electronically, please select the appropriate box on the bottom of the pledge envelope. Your choices include Automatic Bank Withdrawal/Electronic Funds Transfer (from your checking or savings account), Credit Card or On-Line. If you choose to give on-line, you are now done with the pledge form.
- If you choose to give using Automatic Bank Withdrawal/Electronic Funds Transfer or credit card, please complete one of the two boxes. If you selected to Automatic Bank Withdrawal, please fill out the necessary information and include a voided check. If you would like to use your credit card to complete your pledge, complete the box on the right side of the pledge form. Include your credit card number, expiration date and signature. For Automatic Bank Withdrawal and Credit Card, be sure to indicate if you would like to make this gift in monthly installments or as a one-time gift.
- On the form indicate your total pledge amount, your name, telephone number, address and the name of our parish.

- Please don't leave without making your commitment to the campaign TODAY!! This is our annual opportunity to support and thank our Diocese for all the ministries, services and programs they provide for the parishes of San Jose. It is essential that we once again show our support for our local Church. Also, please keep in mind that every dollar raised over our goal of \$\_\_\_\_\_ is rebated back 100% to the parish. This money will be used toward \_\_\_\_\_.
- I know that a pledge of \$\_\_\_\_\_ will truly require a sacrifice for some of our parish households. I also know that some families are unable to contribute at this level. Therefore, in order to reach our goal, we will also need pledges of \$500, \$1,000, \$2,000, even \$5,000 and above. If you are capable of making a larger donation, I ask you to please consider doing so.
- Please reflect back on the gifts God has given you when making your decision about our appeal. Our families, our homes, our health and everything we possess are gifts from God. Your pledge of financial support should be in recognition of God's supreme generosity and in the spirit of true Christian Stewardship.
- If you are unable to make a pledge of \$\_\_\_\_\_ or more, please consider making a ten-month pledge of what you can afford. Our ADA goal requires that each family pledges to the best of their financial ability over the next 10 months, if we are to be successful. We are not asking that everyone make the same size gift, but rather the same size sacrifice!

\*\*\*\*\*

“I would like to pause for just a minute to allow everyone the time to fill out a pledge form.”

“I now ask that the ushers pick up the Pledge envelopes and pencils from the assembly.”

\*\*\*\*\*

Thank you for your attention and sincere consideration for our most important ADA Campaign and please keep this effort in your prayers.

## **ADDITIONAL FUNDRAISING TIPS**

### **PERSONAL PHONE CALLS TO DONORS**

Before the ADA mailing hits the mail and before the pastor makes any ADA announcements from the pulpit, reaching out to key contributors will ensure they feel appreciated and can entice them to increase their ADA pledge.

- 1) Identify the top 10 or 15 ADA donors from last year. The ADA Office (408-983-0292) can get you this list.
- 2) The pastor should personally contact each of these donors either via phone or a personal visit.
- 3) After some small talk, the donor is thanked for their generosity and personally asked to increase their gift. (Remember, your donor should be receiving an ADA request in the mail.)

This focuses on the top donors since that category is generally regarded as the "easiest" to upgrade, and a call from the pastor will make them feel appreciated and valued. This group is also the most likely to upgrade by substantial amounts.

### **SECOND MAILING**

The second mailing should take place so that it reaches parishioners after week 6. This mailing should include previous ADA donors that have yet to donate.

The ADA Office believes it is in every parish's best interest to do the second mailing and covers the cost of the mailing.

Based on the amount of pledges that are received by Easter, parishes that are not near their goal will be required to do the second mailing. The ADA Office will be in touch with those parishes and work closely with you on this effort. The ADA Office will assist parishes with this mailing.

Please contact the ADA Campaign Office at (408) 983-0292, if you require any additional ADA materials or assistance with the mailing.



# GIFT PROCESSOR

## HOW TO PROCESS A PLEDGE FORM

In order to make processing easier for both the parishes and the ADA staff, there are a few suggested steps in processing the gifts.

1. Make sure that all the information on the pledge form is correct and completely filled in. (Name, address, FamilyDioID, parish number, check number, etc.) **The most important piece of information is the FamilyDioID. THIS IS MANDATORY FOR EVERY PLEDGE. Any pledges without the ID will be sent back, as the ADA office cannot go in and add parishioners to your database.** It is your responsibility to make sure the information in ParishSOFT is accurate. For any parishioners that are new, add them to your ParishSOFT database and include the FamilyDioID on the pledge form. Again, make sure all of the demographics are up to date to ParishSOFT. We will not be going into your database and making any changes.
2. After you are sure that all the necessary information has been filled in completely and legibly, please alphabetize then separate them into 4 bundles:
  - a. **Bundle 1:** One Time Gifts ONLY with corresponding checks. *\*see note\**
  - b. **Bundle 2:** Pledges and Pledges with First Payments and their corresponding checks. *\*see note\**
  - c. **Bundle 3:** Credit Card and Direct Debit pledges. Please be sure that credit card pledges have a complete credit card number, expiration date and signature. Also, the direct debit pledges must include a voided check.  
**\*\*\*Please Note: Send one exchange check per bundle, as these are processed separately.\*\*\***
  - d. **Bundle 4:** Sustaining Gifts Forms. Please make sure to separate the credit cards from the direct debits forms.
  - e. **Bundle 5:** Website pledge forms, Stock pledge forms, Gifts from Donor Advised Funds Forms, Matching Gift pledge forms, Electronic Pledge with a check first payment and Gifts of Prayer (Zero Amount pledge forms) can be bundled together and paper clipped.
3. After separating everything into these bundles, run a calculator tape on both the checks and pledge forms. Label them accordingly and initial. For example: One Time Gifts, Payments on Pledges, Electronic Gifts, Sustaining Gifts, etc.
4. Fill out the Transmittal Reports. You will need to complete 3 transmittal forms per week. The first is the “Transmittal Form” for bundles 1 and 2 together. The second is the “Electronic Transmittal Form” for bundle 3. The third is the “Sustaining Gifts Transmittal Form” for bundle 4. No transmittal form is required for bundle 5. If you

have any questions or problems completing these forms please call the ADA Office at 408-983-0246.

5. To guarantee that your parish will be included in the weekly report, we must have your ADA work in the ADA Office by 10 am each Wednesday. The courier will be scheduled appropriately. If you need to make courier changes or cancellations, please contact the ADA Office at least **one week** in advance – Melanie Lara at 408-983-0246 or lara@dsj.org.

#### **Other Helpful Hints:**

- When in doubt about any information on a pledge form or if the pledge is not complete, contact the parishioner before sending the pledge to the ADA Office. **We cannot process an incomplete pledge. Please make sure the information is also up to date in your ParishSOFT database.**
- If you receive a credit card pledge or a direct debt pledge with a down payment of cash or check please **DO NOT** include in any transmittal or bundle, please keep completely separate as they require special handling. Also, if the down payment is cash make a separate exchange check for that.
- If your weekly records do not seem to match what the ADA Weekly Report is showing, contact the ADA Office at 408-983-0246. Remember, we can only process complete pledges.

# PROCESSING DATA WITH PARISHSOFT

ParishSOFT was implemented Diocesan wide in 2009 to ensure the ADA office has the latest and most accurate parishioner mailing information for the ADA. What you are seeing in your office is exactly the same data we see in the ADA office. We use the same family records to mail ADA solicitations, and to track the donations. Please keep ParishSOFT up to date all year long. Failing to maintain your database will result in wasted money on postage at the parish and at the chancery, as well as wasted time pursuing households that are no longer members of the parish or have changed their address. You can obtain a copy of basic data entry standards for ParishSoft by contacting Evan Linick at 408-983-0294 or [elinick@dsj.org](mailto:elinick@dsj.org).

How the ADA Office uses ParishSOFT:

- The ADA Office pulls registered / active parishioners and those who gave to the ADA on behalf of your parish last year.
  - We pull all 53 parishes - approximately 90,000 families in November.
  - Special ADA data pull requests can be accommodated for planning purposes for the next ADA. These requests will be reviewed annually in October.
- After the ADA pledges and donations are received by the ADA Office, ADA staff enters the data into ParishSOFT. The ADA staff DO NOT make address changes or update email addresses. This is the parishes' responsibility; the parish owns the families' data in the parish database. Only the parish itself has the ability to make parishioner data changes. **Please be sure they are captured from the pledge forms before sending them to the Chancery for processing.**
- Reporting: Weekly during the campaign, and monthly thereafter, reports will be generated giving summary information by parish. An email communication will be sent that includes the link for the ADA weekly and monthly reports. At any point if you would like a detailed list of your donors or non-donors please call ADA Services at 408-983-0292.

## TWO PIECES OF INFORMATION ARE CRITICAL FOR EVERYTHING SENT TO THE ADA OFFICE:

- Parish ID number: a list of this is on the following page
- FamilyDio ID: this can be found on the ParishSOFT main screen of the Family Directory. **THIS NUMBER MUST BE FILLED IN** to ensure the family is in the database and you have verified their address and contact information. Please be sure to follow data entry standards and make sure that duplicate family records are not being created in error. Again, the ADA office will not be making any changes to the data in ParishSOFT.

The ADA Office is available to provide parishes with the following for use during the ADA:

- 1) **PLEDGE FORMS** - Blank pledge forms and return envelopes will be provided for new/non-registered donors.
- 2) **FOLLOW-UP REPORT** –This report shows which parishioners have a remaining balance on their pledge. Some of these people may need to be contacted (gently!) and asked, if they can continue their pledge or if they wish to revise it. (See the Follow-Up Chapter in the back of this manual for more details.) Please contact Melanie Lara, [lara@dsj.org](mailto:lara@dsj.org) or 408-983-0292 for one of these reports. Make sure to include your parish number when contacting her.
- 3) **MONTHLY REPORT** – This report is sent to parishes once a month via an email. It is a summary report of the ADA by parish name. It will provide the total pledged, total received, participation, etc. More detailed reports are available by contacting ADA Services at 408-983-0292 or by email [lara@dsj.org](mailto:lara@dsj.org).

## PARISH & PARISHIONER NUMBERS

The computer identifies each parishioner by an account number. This account number is linked to the parish (es) where the parishioner is active. Each parish is also assigned a number. The parish numbers are the following:

201 - St. Frances Cabrini	229 - Most Holy Trinity
202 - St. Lucy	230 - Our Lady of Guadalupe
203 - St. Thomas of Canterbury	231 - Our Lady of La Vang
204 - St. Joseph, Cupertino	232 - Queen of Apostles
205 - St. Mary, Gilroy	233 - Sacred Heart, San Jose
207 - St. Simon	234 - Santa Teresa
209 - St. Mary, Los Gatos	235 - Transfiguration
210 - St. Elizabeth	236 - St. Victor
211 - St. John the Baptist	237 - St. Clare
212 - St. Catherine	238 - Our Lady Star of the Sea
213 - St. Athanasius	239 - St. Justin
214 - St. Joseph, Mt. View	240 - St. Lawrence
215 - St. Thomas Aquinas	241 - Our Lady of Peace
216 - St. Dominic	242 - Sacred Heart, Saratoga
217 - St. Christopher	243 - Ascension
218 - Five Wounds	244 - St. Cyprian
219 - Holy Cross	245 - St. Martin, Sunnyvale
220 - Holy Family	246 - Resurrection
221 - Holy Spirit	247 - St. Brother Albert
222 - St. Anthony	248 - St. Mary of the Assumption
223 - St. John Vianney	249- San Jose Chinese Catholic Mission
224 - St. Joseph Cathedral	250 - St. Francis of Assisi
225 - St. Julie	251 - Christ the King
226 - St. Leo the Great	252 - Holy Korean Martyrs
227 - St. Maria Goretti	253 - Oratory of the Immaculate Heart of Mary
228 - St. Martin of Tours	254 - Our Lady of Refuge
227 - St. Maria Goretti	257 - St. Nicholas and St. Williams
228 - St. Martin of Tours	



## DETAILS OF PROCESSING DATA

When you receive a pledge FORM, please be sure the following entries are CLEARLY AND LEGIBLY WRITTEN ON THE PLEDGE FORM.

ENCLOSED TODAY - This is the amount paid and submitted with the pledge form, the down payment.

TOTAL AMOUNT PLEDGED - This is the total amount pledged for appeal year. It can be up to 10 months but must be completed by December 31<sup>st</sup>.

If the person is already registered on your diocesan database, the rest of the form should be pre-printed with your PARISH NUMBER, the parishioner's FAMILYDIOID, their NAME, ADDRESS, CITY and ZIP.

If the donor hand writes on the pledge form, it is your responsibility to fill in the parish information, and the FamilyDioID. It is possible that the family is already in your ParishSOFT database in this case, the information will be easy to verify. If they are not in your ParishSOFT database, add them and include the FamilyDioID found on the main Family Directory screen. Please call ADA Services at 983-0292 if you need some help with this. The FamilyDioID is how we identify the donors.

During the **eight** weeks of the Appeal, a special ADA courier will come to your parish on Tuesday to pick up all pledge forms and payments. Please ask for proper identification or call the ADA Office if you have any questions. Parishes should forward all pledge forms and checks to the ADA Office each week via the diocesan courier. The courier service we use is called Western Messenger.

# GETTING MORE CAMPAIGN MATERIALS

## CAMPAIGN MATERIALS

- **BROCHURES** - Each year the ADA Office produces a brochure outlining the ADA Campaign. This is the central promotional piece of the Appeal. It outlines diocesan services provided to parishes and provides information on the diocesan budget and expenses. The brochure is available in English only or trilingual English/Spanish/Vietnamese.
- **PLEDGE FORM** - For in-pew solicitation. Parishioners donating during Mass will complete the pledge form. When completed this form can be returned in the offertory or mailed to parish in the return envelope provided.
- **WALL POSTERS AND THERMOMETER** - Large promotional posters, suitable for hanging on bulletin boards, walls, doors and other areas are used to promote the campaign and provide useful information about the ADA. The thermometer posters inform parishioners of the progress of the Appeal at each parish and should be updated weekly.

Extra campaign materials (40% of the number of registered parishioners) will be provided to your parish for in-pew solicitations, tables after mass, for the office, and second follow-up mailings. Should your parish need more campaign materials, please contact the ADA Office by calling 408-983-0246, or email [lara@dsj.org](mailto:lara@dsj.org) These materials are available to parishes on a first-come first-served basis.

*If you have a need for additional materials, please contact the ADA Office at 408-983-0292.*

## GIFTS OF STOCK

The information used to make a stock donation to the Annual Diocesan Appeal (ADA) should be used for stock transfers to any fund in your parish or to the Diocese, i.e. regular offertory donations, donations to parish or school building funds, diocesan collections, etc.

All stock donations must be made to the “Roman Catholic Bishop of San Jose, a corporation sole.” This is the corporation sole for all parishes, schools, missions and other entities of the Diocese of San Jose.

Diocesan Broker:	Portsmouth Financial Services
Account Manager:	Walter J. Bankovitch
Broker Address:	250 Montgomery Street, Suite 200 San Francisco, CA 94104
Diocesan DTC#:	0443
Diocesan Account Number at Portsmouth Financial Services	6PH105792
Diocesan Taxpayer ID #	94-2734503
Portsmouth Financial Services Phone #	415.543.8500

Once Stock is transferred:

- **Notify the ADA Office as to where you want the money to be credited, i.e. your Parish.**
- Make sure your notification has your current address so that you can receive the proper credit for your gift.
- Please notify the ADA Office of the number of shares and the type of stock given. (e.g. 200 shares of XYZ Corporation).

## **FOLLOW-UP INFORMATION**

This Follow-Up Section was produced to aid Pastors, ADA Chairpersons and Gift Processors during the "Pledge Redemption Phase" of the ADA. It will help to explain the duties and responsibilities of each parish during the "Pledge Redemption Phase" and contains several sample letters for various situations.

Now that the Active Phase of the ADA campaign is completed, it is essential to make preparations to take full advantage of the progress that your parish has achieved. However, the true success of the ADA pledge campaign comes only at the end of the redemption/period with the fulfillment of pledges. This section of recommendations should be reviewed and implemented by members of your parish's ADA Committee throughout the "Pledge Redemption Phase."

If the Redemption Program is closely adhered to and if the procedures, suggestions and materials included in this section are employed, the vast majority of your pledges will be collected. On average, our parishes redeem 95% or more of monies pledged to the ADA.

Essential to the successful completion of the Annual Diocesan Appeal is the position of the Follow-Up Administrator. This volunteer or staff person should report to the Pastor and ADA Chairperson on the continuing status of the ADA throughout the year.

If you have any questions or are unsure of any step in the Follow-Up procedures, please contact the Office of Stewardship and Development, at (408) 983-0293, at your earliest convenience.

## **DUTIES AND RESPONSIBILITIES OF THE FOLLOW-UP ADMINISTRATOR**

- To maintain the parish record keeping of ADA pledges and monitor the ADA diocesan record keeping of pledges and payments after the completion of the "Active Phase" (January - April). This can be easily monitored and accessed directly using ParishSoft. Contact the ADA Office for help setting this up.
- To report ADA pledge and redemption results to the Pastor and ADA Chairperson. The Follow-Up Administrator should meet with the ADA Chairperson and Pastor monthly to report the results of the redemption, database changes and delinquencies.
- The Pastor should designate a weekend every other month for ADA updates in order to report the previous period's figures. The following information should be prepared by the Follow-Up Administrator and reported in the announcement.
  - Amount pledged prior to this month
  - New pledges since last report
  - Total Amount Pledged
  - Total % of Parish Goal
  - Total Payments Received to date
  - Total % of Payments Received (Goal of redemption is 100%)
  - Total % of Participation
  - Total monies to be rebated (as they are received over goal)

**All database changes for the upcoming year's ADA campaign should be made in ParishSOFT no later than November 15<sup>th</sup>.**

- To monitor all delinquent accounts via the Follow-Up monthly report, report delinquencies to the ADA Chairperson and Pastor and implement the appropriate follow-up processes for these parish households. Parishes may access this data and additional reports by logging into Parish Soft. Parish Master Reports can be printed directly at your parish.

If a person misses two consecutive payments, the Follow-Up Administrator should report this case to the ADA Chairperson in order that a personal contact can be made to verify the reason for the delinquency.

The ADA Chairperson should then make a report of the results of these personal contacts, which should fall under one of these categories:

- The donor(s) agree to begin pledge payments again.
- The donor(s) choose to adjust or temporarily change his or her payments.
- The person is unable to complete his or her pledge.

In each of these cases, the ADA Chairperson and Pastor should prepare an appropriate letter to send. Sample letters are included in this chapter.

- Produce letters for Follow-Up Mailings, as the Pastor and Chairperson deem necessary. Mailings may be completed periodically during the course of the pledge-redemption phase (April - December) to encourage participation and ensure a successful ADA. These mailings are in addition to the "Mop-Up Mailing" produced by the Diocese and are recommended for those parishes that did not achieve their parish goal, are having problems redeeming their parish goal or would like to increase their parish rebate amount. The ADA Office will assist in these mailings.
- Ensure that the parish sends thank-you letters to everyone who has made a pledge/gift. The Diocese sends a letter from the Bishop to all donors to the ADA. It is strongly recommended that all parishes also produce their own thank you letters to reinforce their gratitude to their donors.



## **REDEMPTION OF PLEDGES/PLEDGE FULFILLMENT**

Upon successful completion of the Active Phase of the ADA, your parish will have a substantial amount of money in cash and pledges. The pledge redemption procedure is essential because it is when these promises are turned into actual dollars. A successful redemption system is reliant on three main components:

### **1. Payment Reminders**

Payment reminders must be sent to ensure the collection of the maximum amount of pledges. The Diocese of San Jose sends out monthly statements and payment envelopes to all donors who have made a pledge that is not paid in full.

### **2. Designate a Follow-Up Administrator**

A Follow-Up Administrator should be appointed to take care of the day-to-day computer entry and record keeping of the Appeal (this may be the ADA Chairperson or Gift Processor). Their primary duties are comprised of processing pledges, keeping track of and following-up with delinquent accounts, as well as maintaining the parish ADA database.

### **3. Follow-Up with Delinquencies**

Every Appeal has the problem of delinquent accounts. It is absolutely necessary that a procedure be used that will keep delinquency to a reasonable minimum and bring about the highest redemption rate of these pledges as possible. When delinquencies develop, the Follow-Up Administrator should work with the ADA Office on the following procedures:

- a) If one monthly payment is missed, the Follow-Up Administrator should prepare a follow-up letter to be signed by the Pastor. Many times, the missed payment is an oversight and is revived the following month.
- b) If a person misses two consecutive payments, the Follow-Up Administrator should report this case to the ADA Chairperson in order that a personal contact be made to verify the reason of the delinquency. A second letter should be sent to make the household aware that a representative from the parish will be calling.
- c) The ADA Chairperson should then make a report of the results of these personal contacts, which should fall under one of these categories:
  - The household agrees to begin pledge payments again.
  - The household chooses to adjust or temporarily change payments.
  - The person is unable to complete his or her pledge.

In each of these cases, the ADA Chairperson and Pastor should prepare an appropriate letter to send. Sample letters are included in the ADA Follow-Up Manual.

## **METHODS FOR MAINTAINING & INCREASING PLEDGES**

Below are several steps that can be undertaken by the parish to maintain and increase pledges. All of these procedures are being used in parishes around the country today. These recommendations are based on the premise that people are benevolent and if kept properly informed and motivated, they will respond positively. These steps should be taken to insure the greatest possible return on the time and effort expended during the Active Phase of the ADA.

### **1. Set a Goal for the Pledge-Redemption/Fulfillment Phase**

Just as a goal is set during the Appeal, it is a good idea to give the "Pledge-Redemption Phase" a goal. This goal should be the eventual collection of 100% of the total pledged amount at the end of the Active Phase. This might appear impossible since there will be a certain percentage of cancellations and adjustments. However, obtaining new pledges should help compensate these losses.

### **2. Follow-Up with New Families and Those Requesting Additional Time**

Solicit new families and re-contact families who asked for additional time to make their pledge. Parishes should keep a running list of all new families who register after the first mailing of the ADA campaign. These families, after they have been properly welcomed into the parish, should be invited to participate as well. Also, those families who asked for additional time in order to make their pledge to the Appeal should be also be re-contacted and asked to participate.

### **3. Using Sensitivity When Dealing with Delinquent Accounts**

Those responsible for facilitating the redemption of pledges should not act as a collection group or a committee that will use force, embarrassment or pressure. Instead, the committee should assist those who have difficulties paying their pledges. In cases of hardship, the committee has the authority to work out temporary or permanent arrangements with families so that their pledges can be fulfilled. Always communicate this information with the ADA Office to avoid confusion and misunderstandings.

### **4. Maintain Accurate Lists for Contacts, Mailings and Reporting**

There are a number of convenient ways to maintain an accurate and up-to-date database for the parish. This will allow the contact information to be accurate and save the time of volunteers doing follow-up work. This will also allow for more accurate reporting. If the pledges, payments and gifts are handled in a careful manner then the parish will benefit by having accurate financial records.

# ADDITIONAL RESOURCES

## PULPIT AND BULLETIN ANNOUNCEMENTS

Please feel free to use any of the enclosed announcements and conform them to your parish's ADA calendar. One recommendation is to highlight a different Diocesan service each week. Please contact the ADA Campaign Office at (408) 983-0293 if you have any questions.

## PRE-PLEDGE WEEKEND

Our invitation from and Bishop Cantú to participate in the 2020 Annual Diocesan Appeal will soon arrive at our homes. Please keep in mind as you receive your personal invitation that this Appeal not only assists our parish in fulfilling their assessment obligation, but at the same time supports the common services and programs that assist all 53 parishes and missions in the Diocese of San Jose.

This year, the theme of the Appeal is, **Encountering Christ, Faith in Action**. As members of Christ and his Church, we are connected to one another-parishioner to parishioner, family to family, and parish to parish.

Our gifts are to be given in gratitude for what God has entrusted to us. A gift/pledge to the Annual Diocesan Appeal will help the work of our local Church to grow and to flourish throughout our Santa Clara County diocesan faith community.

Also, when our parish reaches its goal of \$\_\_\_\_\_ in cash, 100% of the additional funds received will be returned to us for use in our parish.

Please reflect on your blessings and in gratitude consider a pledge to the 2020 Annual Diocesan Appeal.

Please visit [dsj.org/ada](http://dsj.org/ada) for more information and to donate today.

**OR**

**Encountering Christ, Faith in Action**, is the theme of the 2020 Annual Diocesan Appeal, which begins mid February. Please prayerfully consider pledging your support to your parish and our local Church by contributing to the ADA.

**OR**

Summary: Appeal Weekend is next week. You should have already received your Annual Diocesan Appeal information. \*Misc. comments on the importance of the Annual Diocesan Appeal and the services it provides to the parishes of our Diocese. Please prayerfully consider your gift to the 2020 Annual Diocesan Appeal. This year our parish goal is \_\_\_\_\_.

Please consider being as generous as you can and bring your pledge of support with you to Mass next weekend. (See sample talks in the Pastor's Packet.)

### **Pledge Kick-Off Weekend, February 8/9**

Each year our parish and every parish in our Diocese is responsible for a portion of the financial obligation it takes to meet the ministry, programs and services of our Catholic Church. Together, we are able to reach so many more in need than our parish could ever reach alone. By now you should have received at your home, a personal invitation from and Bishop Cantú to participate in the 2020 Annual Diocesan Appeal, **Encountering Christ, Faith in Action**.

Please take the time to look through the brochure at the services, programs and ministries of our Diocese, the many people that are served through this joining of resources and the wonderful generosity that has been shared. I ask you in partnership with Bishop Cantú to consider a gift/pledge to the Annual Diocesan Appeal, to benefit our parish and more importantly all our parishes in the diocese. Every gift is valuable. Sometimes it is hard to envision how your one gift could make a difference in an organization the size of our Diocese, but it does, each Catholic family, each parish, TOGETHER, can fulfill the mission of our Church, to love and serve one another. In trying times our gifts from God may be more difficult to identify, God blesses each of us every day. No one can do everything, but everyone can do something. Thank you for continuing to support your parish and our diocesan faith community in so many ways.

### **OR**

Summary: Appeal Weekend is here. Today is the day that Bishop Cantú and your parish ask for your support for the ministries and services of the Diocese through the Annual Diocesan Appeal. \*Misc. Comments on the importance of the ADA and the services it provides to the parishes of our Diocese. This is your once-a-year opportunity to share your gifts with our local Church and help our parish meet its goal of \_\_\_\_\_. Please be as generous as you can.

### **Week 2, February 15/16**

As we look at our lives and the many ways God has blessed us, let us give back a portion to the Annual Diocesan Appeal as a way of saying thank you to the Lord. If you have yet to make your pledge to our parishes annual support of the Diocese, please consider doing so today. Pledge forms and brochures can be found in the pews or stop by our ADA Tables after Mass. Thank you for your prayerful consideration.

### **OR**

Thank you to everyone who has already answered the request to participate in the 2020 Annual Diocesan Appeal. Your gift is received with great humility, thanks and gratitude. The Annual Diocesan Appeal is an opportunity for our parish to educate many of you who may not be aware of the many ministries, programs and services available throughout our Diocese. If you have any questions about ADA, or how it benefits our parish, please call our parish office, or visit our diocesan website at **[www.dsj.org/ada](http://www.dsj.org/ada)** and discover the many ways you make a difference. If you

have not yet responded we want and need your participation! Don't forget, if we exceed our goal of \$\_\_\_\_\_, 100% of the funds over the goal come back to our parish!

### **Week 3, February 22/23**

As we enter the third week of the 2020 Annual Diocesan Appeal we would like to formally thank all those who have pledged their support for the ministries and services of the parish and Diocese.

To date, \_\_\_\_\_ families have made pledges and gifts of over \$\_\_\_\_\_. We are \_\_\_\_\_% of the way to reaching our goal of \_\_\_\_\_. We are doing great, however, we need everyone's participation in order to be successful. Please make your pledge today. Pledge forms and brochures can be found in the vestibule area of the church.

**OR**

\_\_\_\_\_ families in our parish have made a gift or pledge to the 2020 Annual Diocesan Appeal. Our parish goal is 100% participation. God moves the hearts of everyone, if you have not yet responded, please consider the many blessings from our Lord in your life, and may you receive that wonderful feeling of God's love in the giving of your personal gift on behalf of our parish to the Annual Diocesan Appeal. Your support makes a difference!

### **Week 4, February 29/March 1**

We have each been blessed with many gifts and are called to reach out in faith to share those blessings with one another. Please be as generous as you can in contributing to the 2020 ADA. – **Encountering Christ, Faith in Action.** Consider making your pledge today -- see our ADA Tables after Mass for more information.

**OR**

Thank you to the \_\_\_\_\_ families that have given to the 2020 Annual Diocesan Appeal on behalf of our parish. We have reached \_\_\_\_\_ of our goal of \_\_\_\_\_. Your generosity is gratefully accepted and respectfully used. If you have not yet made a gift or pledge, please prayerfully consider what you can do to help. Every gift makes a difference. You can make a one-time gift, or you can pledge an amount that is payable over ten months. We want and need your participation and your support.

### **Week 5, March 7/8**

“Give and it shall be given to you. Good measure pressed down, shaken together, running over, they will pour into the fold of your garment. For the measure you measure with will be measured back to you.” Luke 6:38

Thank you for your continued support of the ADA and of our parish.

**OR**

If you have already made your gift or pledge to this year's Annual Diocesan Appeal – Thank you!

You and many other faithful, generous donors have joined together on behalf of the 53 parishes and missions in our Diocese in joyful stewardship of treasure! Your generosity supports the many ministries, programs and services that support all of us in the diocese. If you have not yet participated in this opportunity, on behalf of our parish in aid to our larger Diocesan Church, please do so NOW. We want your participation and very much need your support. Thank you in advance for carrying out this blessing to one another. You DO Make a Difference!

**Week 6, March 14/15**

The 2020 ADA passed the halfway point. To date, \_\_\_\_\_% of our parishioners have contributed \$\_\_\_\_\_ towards our goal of \$\_\_\_\_\_. We are very grateful for their support early on in our campaign. Please keep in mind that there are many diocesan ministries that serve our parishioners. This is our once-a-year opportunity to show the Diocese our support. And don't forget - every dollar received over our ADA goal is returned to the parish.

**OR**

The 2020 Annual Diocesan Appeal continues in our parish and throughout our Diocese. If you have not yet responded, please prayerfully consider what you can do to participate in the mission of our Church here in the Diocese of San Jose through this Appeal. We want your participation and need your support. Your gift will make a difference!

**Week 7, March 21/22**

Our Annual Diocesan Appeal fund-raising drive has reached \$\_\_\_\_\_. As of today \_\_\_\_\_% of our parishioners have contributed. We need each of you to get involved if we are to reach our goal of \$\_\_\_\_\_. Please make your pledge today. A follow-up mailing will be sent this week to all those who have yet to make their pledge to the ADA. Pledge forms and brochures can be found in the vestibule area of the church or visit our ADA Tables after Mass for more information.

**OR**

Thank you to our many generous parishioners that have returned gifts and pledges to the 2020 Annual Diocesan Appeal. Your support to this Appeal helps our parish in our financial responsibility to our larger Diocesan Church. To date we have received \_\_\_\_\_ from \_\_\_\_\_ families, toward our \_\_\_\_\_ goal. Please remember, that any amount over our goal comes back to our parish 100%!

Please consider a gift to ADA; every gift makes a difference. We want your participation and need your support.



## **Week 8, March 28/29**

Our parish needs your help! We have reached \_\_\_\_\_% of our ADA goal of \$\_\_\_\_\_. Please make your pledge today to support our Diocese. Pledge forms and brochures can be found in the vestibule area of the church. A follow-up Phone-A-Thon will begin this week in order to reach all those parishioners who have yet to pledge. Thank you, in advance, for your prayerful consideration.

### **OR**

The 2020 Annual Diocesan Appeal continues to succeed in our parish. \_\_\_\_\_ families have responded with a very generous amount of \_\_\_\_\_ towards our goal of \_\_\_\_\_. If you are not yet part of these donors, we want your participation and need your support. Please pray and answer the call to do your part to support our Catholic Church and the mission of God, here in the Diocese of San Jose. Your gift will make a difference!

## **Week 9, April 4/5**

We are each called by the love of God to accept the responsibility for the work of the Parish, the Diocese and Bishop Cantú- made possible by following Jesus and faithfully supporting those who need our help. Please share a portion of your blessings. And don't forget every dollar received over our ADA goal is returned to the parish. Please see our ADA Tables after Mass if you have not yet made your pledge to the ADA.

### **OR**

As the 2020 Annual Diocesan Appeal continues in our parish, we are grateful to the \_\_\_\_\_ families that have made a difference with a generous gift. Our parish has raised \_\_\_\_\_ toward our goal of\_\_\_\_\_.

Many thanks for your participation in this Appeal. If you have not yet made a gift, please reflect on what you can do to also make a difference. Every gift is valued and respectfully used. It is not too late, and we want your participation and need your support! Please consider a pledge, payable through December 2020, or a one-time gift. Gift envelopes are located at the back of the church for your convenience. May God continue to bless you and all the wonderful parishioners of our parish, and of our diocesan faith community, thank you for continued care and support.

## **Holy Week – April 6 - 10**

## **Easter Sunday – April 12**

## **SUGGESTED PRAYERS OF THE FAITHFUL**

Please consider using the following suggested intentions for the weekends of the Annual Diocesan Appeal.

1. That each of us here today may translate our love for God into being good stewards and helping to do the work of the Lord. Let us follow in faith and share our many blessings in our Church. By giving to the Annual Diocesan Appeal we can assist in providing for the needs of others. We pray to the Lord.
2. For Pope Francis and Bishop Cantú, that they will be blessed with wisdom as they shepherd the people of God, we pray to the Lord.
3. That God may bless our parish and Diocese, strengthen our faith and grant us the spirit of Christian stewardship by opening our hearts to the Annual Diocesan Appeal, we pray to the Lord.
4. That the Holy Spirit continues to guide the work of the Church throughout Santa Clara County, as parishioners in all 53 parishes and missions journey together in hope, we pray to the Lord.
5. That the Holy Spirit may continue to guide the work of the Church in our Diocese and that Christ's message of love may be realized by all, we pray to the Lord
6. For all contributors to the Annual Diocesan Appeal that their generosity will give them joy and peace, we pray to the Lord...
7. That we may respond generously to the Annual Diocesan Appeal as faithful followers Christ, we pray to the Lord.
8. That we may be one with God and unified in our mission to serve the Lord as a parish and a Diocese through our ministry and our support of the Annual Diocesan Appeal, we pray to the Lord.
9. That each parish family may demonstrate its understanding of the invaluable connectedness to our diocesan Church and our unity with Universal Church by contributing a portion of our many blessings to the ministries of our Church through your support of the ADA, we pray to the Lord.
10. For all those served by our support of the Annual Diocesan Appeal, that they may know the power of Christ's message of faith, hope, love and unity, we pray to the Lord.
11. That each of us may faithfully follow our calling to share our many blessings with our Church and with others by supporting our parish and diocesan Church through the Annual Diocesan Appeal, we pray to the Lord.

12. For all priests, deacons, religious, and lay persons who offer their best gifts daily to bring Christ to others through ministries and service supported by the Annual Diocesan Appeal, we pray to the Lord.
13. That as witnesses to Christ, may we come to realize more fully that the Lord calls us to serve others and share the gifts God has given us through our ministry and by contributing to the Annual Diocesan Appeal, we pray to the Lord.
14. That our diocesan family may unite in service and ministry to the Lord by faithfully following our calling to minister and serve our Church through the Annual Diocesan Appeal, we pray to the Lord.
15. That through every parishioner's participation in the Annual Diocesan Appeal, we continue to be channels of the living and loving presence of Christ in our world, we pray to the Lord.
16. That God will truly bless all living out the call of discipleship and sharing their blessings by supporting our parish and our Diocese in the Annual Diocesan Appeal, we pray to the Lord.
17. That as we are called to support the ministries of our Church through the Annual Diocesan Appeal, we resolve to practice our faith in this very practical, meaningful way, we pray to the Lord.
18. That as we make our commitment to the Annual Diocesan Appeal, we may remember God's generosity to us, we pray to the Lord.
19. As we proclaim Jesus as our crucified and risen Lord and Savior, may we be inspired to share our gifts out of gratitude with those who benefit from the Annual Diocesan Appeal, we pray to the Lord.
20. For the many people needing assistance from the operations and ministries supported by each parish and mission in our Diocese together, through the Annual Diocesan Appeal, that their needs will be met, we pray to the Lord.
21. That as we participate in the Annual Diocesan Appeal to help others, we give thanks to our God for the gifts and blessings we have received, we pray to the Lord.
22. That God's blessings be upon all those in our parish family and in every parish throughout the Diocese for their part in supporting the many ministries and services funded through the Annual Diocesan Appeal, we pray to the Lord.

23. That as we share the benefits of our blessings with the Annual Diocesan Appeal, we may better know Jesus by faithfully following his example of caring and sharing, we pray to the Lord.
24. That those who have not taken the opportunity to support the Annual Diocesan Appeal will find it in their hearts to respond in gratitude to those who need our outreach and support, we pray to the Lord.
25. That as we make our commitment to the Annual Diocesan Appeal we may remember God's loving generosity to us, we pray to the Lord.

# **SCRIPTURAL REFERENCES TO STEWARDSHIP OLD TESTAMENT**

“But who am I and who are my people that we should contribute so freely? For everything is from you and we only give you what we have received from you...O Lord our God, all this wealth that we have brought together to build you a house in honor of your holy name comes from you and is entirely yours.”

1 Chronicles 29:14-16

“All tithes of the land, whether in grain from the field or in the fruit from the trees, belong to the Lord, as sacred to Him.”

Lev. 27:30

“Each year you shall tithe all the produce that grows in the field you have sown...so that the Lord, your God may bless you in all that you undertake.”

Dt. 14:22, 29

“The measure of your own free-will offering shall be in proportion to the blessings the Lord, your God, has bestowed on you...No one shall appear before the Lord empty handed, but each of you with as much as he can give, in proportion to the blessings which the Lord, god has bestowed on you.”

Dt. 16:10, 16-17

“When you have come into the land which the Lord, your God, is giving you as a heritage and have occupied it and settled in it, you shall take some first fruits of the various products of the soil which you harvest...and, putting them in a basket...you shall go to the priest... (who will) set it in front of the altar of the Lord, your God.”

Dt. 26:1-15

“Honor the Lord with your wealth, with first fruits of all your produce; then will your barns be filled with grain, with new wine your vats will overflow.”

Prov. 3:9

“One man is lavish yet grows still richer; another is too sparing; yet he is the poorer. He who confers benefits will be amply enriched and he who refreshes others will himself be refreshed.”

Prov. 11:24

“In generous spirit pay homage to the Lord, be not sparing of free-will gifts. With each contribution show a cheerful countenance and pay you tithes in a spirit of joy. Give to the Most High as He has given to you, generously, according to your means. For the Lord is one who always repays and He will give back to you sevenfold.” Sirach 35:10-13

## **NEW TESTAMENT**

“Give and it shall be given to you. Good measure pressed down, shaken together, running over, they will pour into the fold of your garment. For the measure you measure with will be measured back to you.”

Luke 6:38

“Avoid greed in all its forms. A man may be wealthy, but his possessions do not guarantee him life.”

Luke 12:15

“You need to recall the words of the Lord Jesus Himself, who said, “There is more happiness in giving than in receiving.”

Acts 20:35

“We have gifts that differ according to the favor bestowed on each of us. One’s gift may be prophecy...it may be ministry...a teacher...the power of exhortation. He who gives alms should do so generously...he who performs works of mercy should do so cheerfully.”

Romans 12:6-8

“Men should regard us as servants of Christ and stewards of the mysteries of God.”

1 Corinthians 4:1

“He who sows sparingly will reap sparingly and he who sows bountifully will reap bountifully. Everyone must give according to what he has inwardly decided; not sadly, not grudgingly, for enough of everything and even a surplus for good works.”

2 Corinthians 9:6-8

“We brought nothing into the world, nor have we the power to take anything out...those who want to be rich are falling into temptation and a trap...the love of money is the root of all evil.”

1 Timothy 6:7-9

“Above all, let your love for one another be constant, for love covers a multitude of sins. Be mutually hospitable without complaining. As generous distributors of God’s manifold grace, put your gifts at the service of one another, each in the measure he has received.”

1 Peter 4:8-10

“Do not lay up for yourselves an earthly treasure. Moths and rust corrode; thieves break in and steal. Make it your practice instead to store up heavenly treasure which neither moths nor rust corrode nor thieves break in and steal. Remember, where your treasure is, there your heart is also. No man can serve two masters. He will either hate one and love the other or be attentive to one and despise the other. You cannot give yourself to God and money. I warn you, then; do not worry about your livelihood, what you are to eat or drink or use for clothing. Is not life more than food? Is not the body more valuable than clothes? The unbelievers are always running after these things. Your heavenly Father knows all that you need. Seek first His Kingship over you, His way of holiness and all these things will be given you besides. Enough, then, of

worrying about tomorrow. Let tomorrow take care of itself. Today has troubles enough of its own.”

Matthew 6:19, 24-25, 32-34

“It cannot be like that with you. Anyone among you who aspires to greatness must serve the rest; whoever wants to rank first among you, must serve the needs of all. The Son of Man has not come to be served but to serve—to give his life in ransom for the many.”

Mark 10:43-45

“When much has been given a man, much will be required of him. More will be asked of a man to whom more has been entrusted.”

Luke 12:48

“Tell those who are rich in this world’s goods not to be proud and not to rely on so uncertain a thing as wealth. Let them trust in the God who provides us richly with all things for our use. Charge them to do good, to be rich in good works and generous, sharing what they have. Thus will they build a secure foundation for the future, for receiving that life which is life indeed.”

1 Timothy 6:17-19

Parables of Jesus that deal with money and possessions:

The Two Debtors	Luke 7:41-43
The Hidden Treasure	Matthew 13:44
The Costly Pearl	Matthew 13:45
The Unmerciful Servant	Matthew 18:23-35
The Good Samaritan	Luke 10:25-37
The Friend at Midnight	Luke 11:5-8
The Rich Fool	Luke 12:16-21
The Barren Fig Tree	Luke 13:6-9
The Tower Builder	Luke 14:28-30
The King Contemplating a Campaign	Luke 14:31-33
The Lost Sheep	Luke 15:3-7
The Lost Coin	Luke 15:8-10
The Prodigal Son	Luke 15:11-32
The Unjust Steward	Luke 16:1-7
The Rich Man and Lazarus	Luke 16:19-31
The Unjust Judge	Luke 18:1-8
The Pharisee and the Tax Collector	Luke 18:9-14
The Wicked Tenants	Matthew 21:33-46
The Servant Entrusted with Supervision	Matthew 24:45-51; Luke 12:42-48
The Talents	Matthew 25:14-30; Luke 19:12-27
Sheep and Goats	Matthew 25:31-46



## SAMPLE MAJOR GIFT LETTER

DATE

«NAME»

«ADD»

«CTY», «ST» «ZIP»

Dear «SALUTATION»,

We are facing a different world today. We have experienced changes in the economy, challenges to our sense of safety and security and the needs of many locally and around the world presented. Now more than ever...or at any other time in recent memory, people are looking to the Church for spiritual direction, leadership and support.

The Annual Diocesan Appeal embraces the charitable, spiritual and educational needs of thousands of individual families and in what is an enduring miracle, helps to unite us into one diocesan family. Indeed, the ministries and services supported by the ADA are so much a part of our lives – it is easy to take them for granted. But, think how necessary these services and ministries become when providing individual, marital and family counseling – responding to the urgent needs of our brothers and sisters. Consider how important specially trained teachers sharing the message of Jesus Christ are, to the lives of the families whose children attend faith formation classes, seminarians, vocations, etc.

At every moment of every day – someone somewhere is making a difference in our Diocese. The ADA asks each of us to recognize that we are all part of a larger diocesan Church that transcends personal and parish boundaries. Please join us on a common journey to meet the day-to-day needs of our Diocese. Now more than ever...because the need never stops.

Time and again, you have put the needs of our larger faith community at (Name of Parish) above your own needs and wants, without question or hesitation. I feel truly blessed for the privilege of walking this journey with each of you. Your last sacrificial gift of \$\_\_\_\_\_ made a difference to the ADA. This year, Bishop Cantú and I ask that you consider making a gift as a sign of your ongoing commitment to God and His Church in the Diocese of San Jose.

Please know your participation at (Name of Parish) is very important to us and your partnership in this year's ADA will be much appreciated. Thank you for your generosity.

Sincerely in Christ,

Rev. \_\_\_\_\_  
Pastor

## SUGGESTED FIRST LETTER TO SEND TO DELINQUENT ACCOUNTS - ONE MONTH LATE

DATE

«NAME»

«ADD»

«CTY», «ST» «ZIP»

Dear «SALUTATION»,

In January we began our Annual Diocesan Appeal (ADA) Campaign, “**Encountering Christ, Faith in Action**” to meet our parish goal of \$\_\_\_\_\_. Your fellow parishioners and myself asked that you consider a pledge to the campaign, payable over a ten-month period. As pastor of your parish, I truly thank you for your generosity in making a pledge towards our effort.

It has been brought to my attention that you have not been following the payment schedule you have selected for your pledge. If there is a problem or misunderstanding, I ask that you contact me in order to discuss it. I know that, for one reason or another, this may be an oversight. If so, please use the enclosed envelope for your payment.

Please join your fellow parishioners who continue to assist us in providing for our local Catholic community.

Sincerely in Christ,

Rev. \_\_\_\_\_

Pastor

"A foundation has been laid and others will build upon it."

1 Cor. 3

# **SUGGESTED SECOND LETTER TO SEND TO DELIQUENT ACCOUNTS-- SENT PRIOR TO THE PHONE CALL**

DATE

«NAME»

«ADD»

«CTY», «ST» «ZIP»

Dear «SALUTATION»,

I am happy to report that following my review of our Annual Diocesan Appeal (ADA) records, the vast majority of pledges are being fulfilled in accordance with the payment schedule. To date, we have received over \$\_\_\_\_\_ of our overall pledge total of \$\_\_\_\_\_.

Last month, however, I wrote to you concerning the fulfillment of your ADA commitment, since a payment on your pledge has not been received in some time. I realize that there may be some personal commitments or problems that may be preventing you from making your payments and, therefore, I have asked a member of our parish ADA committee to contact you. It is your pledge, along with the pledges of many others, that will enable us fulfill our commitment to the services and ministries of the Diocese. Please feel free to discuss the matter with them or if you would rather, you may contact me personally at the parish offices.

All pledges are vital to the success of our ADA campaign. Please be as helpful as you can.

Sincerely in Christ,

Rev. \_\_\_\_\_  
Pastor

**SUGGESTED THIRD LETTER TO SEND TO  
DELIQUENT ACCOUNTS LETTER OF THANKS-  
SENT AFTER PHONE CALL BY ADA COMMITTEE  
MEMBER**

DATE

«NAME»  
«ADD»  
«CTY», «ST» «ZIP»

Dear «SALUTATION»,

Thank you for speaking with members of the Annual Diocesan Appeal (ADA) Committee when they called on you to discuss your pledge payments to the ADA Campaign, “**Encountering Christ, Faith in Action**”. It makes me very happy to hear that you have been able to resume payments on your pledge and by doing so, participate in our annual undertaking to benefit our local Church, the Diocese.

Our program is built on pledges and the fulfillment of each pledge is most appreciated. Thank you for your special generosity at this time.

Sincerely in Christ,

Rev. \_\_\_\_\_  
Pastor

"A foundation has been laid and others will build upon it."  
1 Cor. 3

**SUGGESTED THIRD LETTER TO DELINQUENT  
ACCOUNTS**  
**LETTER OF PLEDGE CANCELLATION--**  
**SENT AFTER PHONE CALL BY ADA COMMITTEE**  
**MEMBER**

DATE

«NAME»

«ADD»

«CTY», «ST» «ZIP»

Dear «SALUTATION»,

Thank you for speaking with members of the Annual Diocesan Appeal (ADA) Committee when they called on you to discuss your pledge payments to the ADA, "**Encountering Christ, Faith in Action.**" I'm sorry to hear that you will be unable to complete your pledge this year. (INCLUDE INFORMATION ON WHY SPECIFICALLY THE PERSON OR HOUSEHOLD IS CANCELLING). I pray that your situation will improve.

Thank you for your interest and consideration toward our ADA. The involvement and support of all members of our parish is always our most important goal. I hope that you will keep this most important endeavor in your heart and prayers.

Sincerely in Christ,

Rev. \_\_\_\_\_  
Pastor

**SUGGESTED THIRD LETTER TO DELINQUENT  
ACCOUNTS**  
**LETTER OF PLEDGE ADJUSTMENT--**  
**SENT AFTER PHONE CALL BY ADA COMMITTEE**  
**MEMBER**

DATE

«NAME»

«ADD»

«CTY», «ST» «ZIP»

Dear «SALUTATION»,

Thank you for speaking with members of the Annual Diocesan Appeal (ADA) Committee when they called on you to discuss your pledge payments to the ADA, "**Encountering Christ, Faith in Action**". I would like you to know that I understand your situation and am happy to hear that you will be able to continue pledging to our ADA drive at the adjusted pledge schedule you have requested.

The involvement and support of all members of our parish is always our most important goal. Thank you for your continued generosity and consideration toward our Annual Diocesan Appeal.

May the Lord bless you and keep you.

Sincerely in Christ,

Rev. \_\_\_\_\_  
Pastor

**SUGGESTED SAMPLE LETTER TO BE SENT TO  
THOSE WHO ARE NOT DELINQUENT, BUT ARE  
NOT CONTRIBUTING AS THEY AGREED**

DATE

«NAME»

«ADD»

«CTY», «ST» «ZIP»

Dear «SALUTATION»,

I would like to express my utmost appreciation for your monthly contributions. With the pledges of households like yours, we have received over \$\_\_\_\_\_ of our overall pledge total of \$\_\_\_\_\_.

However, in looking through my records, I have noted that you have not been contributing as you agreed during the "**Encountering Christ, Faith in Action**" Annual Diocesan Appeal (ADA). I have enclosed a statement for you to review your account and payment schedule.

I ask that you review the statement and re-contact the parish. I realize that this may be an oversight on our part. If you need to make changes to your payment schedule, please contact the parish office so we can rectify this situation.

Thank you for your cooperation and, once again, thank you for your support of the ADA.

Sincerely in Christ,

Rev. \_\_\_\_\_  
Pastor



## SUGGESTED LETTER TO BE SENT TO THOSE WHO HAVE MADE A PLEDGE OR GIFT

DATE

«NAME»

«ADD»

«CTY», «ST» «ZIP»

Dear «SALUTATION»,

Thank you for your generous pledge of \$\_\_\_\_\_ and your down payment of \$\_\_\_\_\_ to our Annual Diocesan Appeal, "**Encountering Christ, Faith in Action**". Your generosity has set the pace for our success. Already we have received over \$\_\_\_\_\_ in gifts and pledges from over \_\_\_\_\_ households!

As you know, the Annual Diocesan Appeal is a very important effort for our parish. It is our annual support as a parish that ensures the many services and ministries of the Diocese of San Jose. Your contribution, along with those of many others in our community, will enable us to once again offer our support to our local Church.

May God bless you and know that you are always in my prayers.

Sincerely in Christ,

Rev. \_\_\_\_\_  
Pastor

"A foundation has been laid and others will build upon it."  
1 Cor. 3

## **SAMPLE THANK YOU LETTER**

DATE

«NAME»

«ADD»

«CTY», «ST» «ZIP»

Dear «SALUTATION»,

Your gift to the Annual Diocesan Appeal helps to reflect Christ's love to many people whose lives are touched by the ministries and services of this Diocese. We are all called to share our resources and ourselves. We are called to join together to make a difference. The ADA helps to provide service and resources to people in our community, staff and people throughout the County of Santa Clara.

Thank you for your support of this year's Appeal. Many people, such as you, in our parish have come together to make a difference.

I am proud to be your pastor. The enthusiastic response of so many parishioners is a wonderful testament to how we reach out to others. Your response gives me confidence that we will continue to journey in faith and grow in our understanding of what it means to reflect Christ's love (John 15:9-17).

Please keep our parish family and our broader community in your prayers, as I keep you in mine. Thank you for your generosity.

Yours in Christ,

Rev. \_\_\_\_\_  
Pastor

# **SAMPLE PREVIOUS NON-CONTRIBUTOR LETTER**

DATE

«NAME»

«ADD»

«CTY», «ST» «ZIP»

Dear «SALUTATION»,

We are facing a different world today. We have experienced changes in the economy, challenges to our sense of safety and security and the needs of many locally and around the world presented. Now more than ever...or at any other time in recent memory, people are looking to the Church for spiritual direction, leadership and support.

The Annual Diocesan Appeal embraces the charitable, spiritual and educational needs of thousands of individual families in what is an enduring miracle, helping to unite us into one diocesan family. Indeed, the ministries and services supported by the ADA are so much a part of our lives that it is easy to take them for granted. But, think how necessary these services and ministries become when providing individual, marital and family counseling and still responding to the urgent needs of our brothers and sisters. Consider how important specially trained teachers sharing the message of Jesus Christ are to the lives of the families whose children attend faith-formation classes, seminarians, vocations, etc.

At every moment of every day – someone somewhere is making a difference in our Diocese. The ADA asks each of us to recognize that we are all part of a larger diocesan Church that transcends personal and parish boundaries. Please join us on a common journey to meet the day-to-day needs of our Diocese. Now more than ever...because the need never stops.

Time and again, parishioners have put the needs of our larger faith community at (Name of Parish) above your own needs and wants - without question or hesitation. I feel truly blessed for the privilege of walking this journey with each and everyone. Please consider joining our other parishioners in making a gift to the ADA. Perhaps, consider making a pledge, which will enable you to give more, for example, an initial gift of \$25 and a pledge to give \$25 a month would make a generous contribution. Whatever prayerful offering you are able to make, Bishop Cantú and I appreciate your ongoing commitment to God and His Church in the Diocese of San Jose.

Please know your participation at (Name of Parish) is very important to us and your partnership in this year's ADA will be much appreciated. Thank you for your generosity.

Sincerely in Christ,

Rev. \_\_\_\_\_

Pastor

## **SAMPLE 2ND MAILING LETTER “A”**

DATE

NAME

ADDRESS

CITY, STATE ZIP

Dear SALUTATION,

I would like to update you on the progress of our 2020 Annual Diocesan Appeal Campaign, **“Encountering Christ, Faith in Action.”** Our parish efforts to date have allowed us to raise over \$ (PLEDGE AMOUNT TO DATE) in pledges and gifts toward our goal of \$ (GOAL AMOUNT). We are (% OF GOAL) % of the way toward achieving our goal. As you can see we still need your help. The participation of each member of our parish is important.

I am writing today to invite you to participate. Please keep in mind that this is our once-a-year opportunity to support the ministries and services provided by the Diocese of San Jose. To date, over (# OF DONORS) parishioners of (YOUR PARISH NAME) have made gifts and pledges ranging from \$ (RANGE OF GIFTS) -- our average gift is approximately \$(AVERAGE GIFT).

Everyone in the parish is asked to consider making a gift or pledge, payable monthly until December 31<sup>st</sup>. We welcome and appreciate all gifts and pledges, regardless of the amount and duration. Since everyone has different circumstances, I only ask that you consider a pledge or cash donation to the best of your financial ability.

Please find enclosed a pledge form. Please fill out the pledge form and drop it in the collection at Mass. Please respond as soon as you are able so our follow-up committee will have fewer families to re-contact when they begin their work. If you have any further questions about the campaign or need additional information please call the parish offices at (PARISH OFFICE PHONE #).

Be assured of my prayers. Thank you for your help and cooperation.

Sincerely yours in Christ,

Rev. \_\_\_\_\_  
Pastor

## SAMPLE 2ND MAILING LETTER “B”

DATE

NAME

ADDRESS

CITY, STATE ZIP

Dear SALUTATION,

Since early February, we have been conducting the ADA campaign, “**Encountering Christ, Faith in Action**“, in our parish. As we have said earlier, our goal is to encourage participation from every member of our parish.

To date, we have received pledges from (# OF PARISHIONERS DONATING) members of the parish in the amount of \$(AMOUNT OF TOTAL PLEDGED). Our parish goal this year is \$ (AMOUNT OF PARISH GOAL).

We are hoping that you will be able to participate by making a pledge this year. We ask that you prayerfully consider contributing as a way to give thanks and praise to God for all His gifts in your life. If the time is difficult right now for you, consider a small donation each month.

I appreciate your kind consideration of this request and I look forward to hearing from you.

Be assured of my prayers. Thank you for your help and cooperation.

Sincerely yours in Christ,

Rev. \_\_\_\_\_

Pastor

## SAMPLE 2ND MAILING LETTER “C”

DATE

«NAME»

«ADD»

«CTY», «ST» «ZIP»

Dear «SALUTATION»,

At this time, we are in our \_\_\_\_ week of the Annual Diocesan Appeal. The results to date have been quite positive. More than \_\_\_\_ parishioners have already pledged or given for this worthwhile diocesan effort. Through the appeal, funds are provided for the numerous services and ministries the Diocese of San Jose provides to parishes and parishioners.

Our goal this year is to contact all members within our parish family and ask for their help and financial support. After reviewing our returns, we realized that we missed you. I invite you to participate in the ADA by making a pledge or one-time cash gift to the ADA. It is important to remember that with all parishes and parishioners participating, we can provide services to people which no single parish can afford on its own.

Enclosed is a pledge form to be returned to the parish. Please fill it out in the spirit of generosity and Christian Stewardship to help our parish achieve its goal of \$\_\_\_\_\_. No gift is too small. If you feel you cannot make a gift at all, please write “no gift” or “unable to contribute” on the form. We would like to hear from everybody in the parish. Please return the envelope to the volunteers after Mass or mail it back to the parish.

Thank you and God bless you in advance of your generosity.

Sincerely yours in Christ,

Rev. \_\_\_\_\_  
Pastor

## PHONE CALLS TO ALL PARISHIONERS “A”

1. Select 20 - 30 people from your parish (depending on the size of the parish) who are willing to make phone calls to fellow parishioners from their home.
2. Identify all parishioners who have not responded to the ADA campaign to date. A list can be obtained from the ADA Office.
3. Compile lists for the volunteer phone callers.
4. Give the phone callers one-week to complete approximately 20 - 25 calls.
5. Select a date for training. Training should be no longer than 1 hour.
6. Give them a written script to follow and all appropriate pledge envelopes to fill out (see the sample phone script on the following page).
7. Instruct volunteers to call during appropriate times, see below.
8. Instruct volunteers to accept pledges over the phone.
9. Give volunteer callers a date to turn in all information.
10. The parish office should immediately send out thank-you letters in order to confirm any phone pledges made.

### Optimal Phone Times

Sunday afternoon	@	1:00 PM - 4:00 PM
Sunday evening	@	7:00 PM - 9:00 PM
Monday evening	@	7:00 PM - 9:00 PM
Tuesday evening	@	7:00 PM - 9:00 PM
Wednesday evening	@	7:00 PM - 9:00 PM
Thursday evening	@	7:00 PM - 9:00 PM

Please keep in mind that callers should leave a message if there is no answer, indicating the caller's name and phone #, so that the parishioner may return the call at a time convenient for them.

## PHONE CALLS TO ALL PARISHIONERS “B”

1. Select 20 - 30 people from your parish (depending on the size of the parish) who are willing to make phone calls to fellow parishioners.
2. Identify all parishioners who have not responded to date. This list should correspond to the list generated for the second mailing.
3. Compile lists for the volunteer phone callers.
4. Secure an office with many phones (real estate, insurance, banks). Some businesses (especially those owned by parishioners) may allow charitable organizations to use their facilities on off-hours.
5. Have your volunteers arrive about 45 minutes before you intend to start the phoning. Use this time for training. Give them a written script to follow and all appropriate forms to fill out. (See the sample phone script on the following page.)
6. Call during appropriate times. (See “Optimal Phone Times” listed below.)
7. Accept pledges over the phone.
8. The parish office should immediately send out thank-you letters in order to confirm any phone pledges made.
9. Be sure to provide for refreshments for your phone callers.
10. 10 - 15 calls per hour are a realistic target for one volunteer.

### Optimal Phone Times

Sunday afternoon	@	1:00 PM - 4:00 PM
Sunday evening	@	7:00 PM - 9:00 PM
Monday evening	@	7:00 PM - 9:00 PM
Tuesday evening	@	7:00 PM - 9:00 PM
Wednesday evening	@	7:00 PM - 9:00 PM
Thursday evening	@	7:00 PM - 9:00 PM

Please keep in mind that callers should leave a message if there is no answer, indicating the caller's name and phone #, so that the parishioner may return the call at a time convenient for them.



## **SAMPLE PHONE SCRIPT**

“Good morning/afternoon/evening. This is (your name) calling from (name of parish). May I please speak with (prospect’s name)?

I am calling on behalf of Fr. (name of Pastor) regarding the Annual Diocesan Appeal. As you may be aware, we are currently in the midst of our annual fund-raising drive to support our parish and Diocese. Our parish goal this year is to raise a minimum of (goal amount). We attempted to mail ADA information to all of our parish families. Did you receive this information?

As a parish, we have been asking all of our parishioners to consider making a 10-month pledge to the Appeal of (ask amount) or more to raise the necessary funds to complete this project. To date, over (number of families pledging) parish families have pledged their financial support to our annual support of the Diocese. Already, we have received over (enter current pledge total) of our parish goal of (enter goal amount).

I am calling to answer any questions you may have and ask if you will consider taking part in this campaign by making a pledge?”

**VERY IMPORTANT: WAIT FOR A RESPONSE!! ALWAYS ALLOW THE DONOR TIME TO RESPOND TO YOUR REQUEST.**

### IF YOU RECEIVE A POSITIVE RESPONSE

1. Show your enthusiastic appreciation!
2. Review the Suggested Gift Plans ("How much would you like to pledge each month?")

If the donor suggests a one-time donation, gratefully accept their donation and tactfully ask them if they could consider a similar donation later on in the year. You may want to add: "Every dollar we raise over our goal is rebated back to the parish and will be used toward (what rebated monies are used for) i.e. the renovation of the parish hall; new carpet for the church, etc.

3. Upon arriving at an amount, fill in the proper areas on the pledge form.
  - a. Confirm the donor's name and address.
  - b. Record the following gift information:
    - The pledge amount or one-time gift amount.
    - If a pledge, over how many months.
    - Credit card or Direct Debit information, if applicable.

### IF THE PERSON IS UNSURE OR WOULD LIKE MORE TIME

1. "In order to help us reach our goal, we need the support of all our parish families. Your participation is very important to the parish. Pledges and donations of all sizes are greatly needed and appreciated." (If a pledge or donation is requested, please refer to STEP 1)
2. If they still are unsure or need more time. "Would it be O.K. if I called you back in a week?"
  - A. (If yes) "Thank you for your consideration. May I mail the campaign information to you to review in the mean time? I look forward to speaking with you next week."
  - B. (If no) "May I please mail the information to you to review and consider at your own convenience? Thank you in advance for considering supporting our Appeal."

### IF THE PERSON RESPONDS NEGATIVELY

"Every member of our parish family is important to us and we hope that you can consider supporting this effort at some point in the future. Thank you for taking the time to speak with me. Is there anything the parish can do for you?"

### NO RESPONSE OR ANSWERING MACHINE

1. NO ANSWER: Mark N/A (No Answer) on the phone sheet.
2. ANSWERING MACHINE: Leave the following message: "My name is (your name) and I am calling on behalf of Fr. (name of Pastor) from (name of parish) Catholic Church, regarding the Annual Diocesan Appeal. I will try calling back tomorrow at \_\_\_\_\_am/pm. If you would like to reach me before then, I can be reached at (your phone number). \*Mark "L/M" (Left Message) on the phone sheet.
3. PERSON OTHER THAN PROSPECT ANSWERS: Leave message that (name of parish) Catholic Church called and will call back. \*Mark L/M on the phone sheet.

### REFUSALS

Please use the number code below to indicate the person's reason for refusal. Place the number on the line next to the person's name on the phone list, along with a brief memo.

- |                           |                                     |
|---------------------------|-------------------------------------|
| 1. Moved or moving soon   | 6. Cannot afford a pledge right now |
| 2. Not at home            | 7. Does not support this endeavor   |
| 3. Not a member of parish | 8. Already turned in a pledge       |
| 4. Serious illness        | 9. Other (Briefly explain)          |
| 5. Deceased               |                                     |

### A FEW TIPS

- Practice once or twice on your spouse, cousin, neighbor, or best friend. Actually call them on the phone and take a pledge.
- Familiarize yourself with the ADA brochure materials before beginning your phone calls - that way you will be able to answer questions more effectively and provide useful information on the ADA to the donor when necessary. You might also review the ADA FAQs.
- Regardless of the reply, be positive and thank the person for speaking with you.
- For those who seem upset, be a good listener. Let them express themselves and also, let them know that their support is needed and appreciated.
- If a person is persistent on a question you do not know the answer to, let them know you will find out the answer and respond back to them. Then contact your parish office or the diocesan office for information.

If you have any questions, please contact your parish office or contact the ADA Office at the Diocese of San Jose, (408) 983-0293.