

Conducting the *Annual Partners in Charity Appeal*

There are three important aspects of this annual appeal. Call them ‘phases,’ if you will. Ideally, they are the standard operating procedure for any annual diocesan appeal, parish capital or fundraising effort, or increased offertory campaign. In the experience of many parishes, if all three are utilized, success in meeting your goal is assured. They are:

- 1) **Advance Gifts**
- 2) **In-Pew Solicitation**
- 3) **Call-backs**

Advance Gifts

The request for advance gifts - from a relatively small number of parishioners – has been encouraged by the annual appeal for many years. All significant fundraising efforts seek advance gifts, which are essentially leadership gifts. They are central to the success of many a campaign. Every major social institution seeks advance gifts, and it is widely recognized that without these, funding initiatives would be much more limited. Colleges and universities seek them. Hospitals depend on them. The *YMCAs* and *YWCA*s request them, as do *Boys Clubs* and *Girls Clubs*. Inner-city schools rely on them. The *Red Cross* does this. The list goes on and on.

The Church should also make use of advance gifting. The Church has clearly made an enormous contribution to the lives of millions of people in our society, as well as to many persons whose personal successes have endowed them with the ability to make a larger contribution than most.

Advance gifting simply means identifying those parishioners (perhaps 1% or 2% of all parishioners) who are able to make more substantial gifts, and personally inviting them to do so prior to the general appeal. These gifts are virtually never refused - if the request is realistic and well-stated – and provide a foundation from which to build the general parish phase of the drive. An obvious advantage is that the pastor or chairpersons can announce to parishioners on *In-Pew Sunday* that the parish has already raised a certain number of dollars toward its goal, or a certain percentage has been raised, or that the parish is doing very well in its early stages.

More than anything else, the success of an advance giving effort means *believing* in the *cause* for which you are making an advance request. Believing in the significance of the charitable, educational and pastoral mission of the Church is the heart of the matter! Then you can confidently ask others for their support.

Advance giving means that the pastor and committee chairpersons determine which parishioners might be approached for an advance gift. Generally, the pastor and a few committee members share the task of approaching their fellow parishioners for advance gifts. Committee members should also make an advance gift. This enables you to tell others that you have already made your advance gift. Either phone calls or house calls

are made to prospective donors. If those called upon agree to make an advance gift, a pledge envelope is sent to them immediately so that they can make their gift and return it to the parish office. They should be thanked immediately.

The pastor or committee member making an advance gift request should be someone who is comfortable doing so. Not everyone is. On the other hand, there are some people who are very capable of doing this and enjoy it.

When advance giving is utilized, parishes raise a substantial percentage of their goal prior to an in-pew solicitation: 25%, 50%, or even 100% of the parish goal.

A few years ago, one parish surpassed its goal through advance gifts alone. When this was announced to the parishioners on the weekend of the in-pew solicitation, those parishioners made gifts that doubled the parish goal, and did so on *In-Pew Sunday*. Through announcements of the appeal's progress in the parish bulletin, week after week, still more parishioners kept giving. That parish completed the annual appeal by reaching 245% of its assigned goal, and all the parishioners were very proud of their ability to provide for charity, education and ministry.

The key factor in the success of the appeal of that particular parish was the 15 to 20 families who had made an advance gift. They had created a momentum that inspired hundreds of other families to give generously.

Those who are in a position to give more - for charity, for education, and for ministry - do not get upset when asked to make an advance gift. Generally, they are humbled by the request and honored to make one because they know that they have been blessed by God and believe in sharing what they have received to help others. Virtually no one makes an advance gift, however, if they are not asked to do so.

Advance giving means confidently asking others to assist in the annual appeal for the sake of charity, education and ministry...three of the most highly-prized features of our society.

The In-Pew Solicitation

In recent years, the in-pew solicitation has been adopted by almost every parish in the Diocese. It occurs on the *In-Pew Sunday* adopted by the parish. Quite simply, on *In-Pew Sunday*, the pastor or his designee invites the parishioners in attendance to make their annual pledge, using the pledge envelopes which are distributed by the ushers at the appropriate time. The pledge envelopes are then collected by the ushers, either with the regular offertory collection, or following Communion if the appeal and spoken instructions are made following Communion.

The instructions on how to make a pledge and how to complete the information required on the pledge envelope should follow a spirited homily or presentation on the significance of the *Annual Partners in Charity Appeal*. If a homily regarding the appeal

is given by the pastor then the pledging should immediately follow. It is best, in that case, that the pastor guide the people through the use of the pledge envelope. When completed, the envelopes can then be collected, and the Mass continues.

Sometimes pledge envelopes are sent to parishioners through the mail. The disadvantage of this practice is that the parishioners often do not hear the pastor or a well-spoken committee member actually speak about the importance of the annual appeal from the pulpit. ‘Witnessing’ to the significance of the appeal is essential. There is truly nothing like a *live explanation* of the appeal’s significance, sharing real stories of our charitable, educational and pastoral accomplishments and hopes, and spoken from the heart.

Either on *In-Pew Sunday*, or immediately thereafter, the pastor or the committee tabulate the results of the in-pew solicitation, apply the special label provided by the diocesan office on the pledge envelope or pledge card, deposit the parishioners’ checks where applicable, return all the pledge envelopes and/or pledge cards to the diocesan office. When parishioners have included checks inside their pledge envelope, it is best that all checks be made payable to the parish and deposited in the parish checking account. Then, a single parish check can accompany all the pledge envelopes as they’re sent to the diocesan office. It is important that the parish tabulators verify the information on the pledge envelope with the checks they receive.

Call-backs

By *call-backs* we mean developing a process of reaching out to those parishioners who have not yet made a gift following the in-pew solicitation on *In-Pew Sunday*. Some parishioners are away from the parish on *In-Pew Sunday*. Each weekend, there are always some families not present in the assembly because of business or holidays or personal errand. Or, perhaps others are infirm and unable to be present regularly at Mass, but typically make a gift to the annual appeal.

We also know that there are parishioners who are seldom present at Mass but always make a gift to the annual appeal.

Call-backs provide an opportunity for these parishioners to share in the giving of the entire Christian community. We are all called to be *partners in charity*, and partners with Christ.

Developing a process for call-backs is an important function of the parish appeal committee. Once identified as not yet having made a gift, short lists of parishioners can be provided to committee members who agree to make a polite phone call to request a family’s gift. Parishioners could be visited in their homes, especially if they live in the same neighborhood or are known to the committee member.

Perhaps the greatest role played by the parish’s appeal committee members, and where committee members are really needed, is for the purpose of call-backs.