

2011
Archbishop's
Annual Appeal

***“From his fullness we have received,
grace upon grace.”***

- John 1:16

LEADERSHIP MANUAL

Administrator Edition

Office of Development
(415) 614-5580
SFArchdioceseDevelopment.org

ARCHBISHOP'S ANNUAL APPEAL 2011

"From his fullness we have received, grace upon grace."

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This manual and the associated forms, letters, tables and other assists have been provided on CD-ROM and are available on the Office of Development website (SFArchdioceseDevelopment.org). Call (415) 614-5580 for additional CD-ROM copies.

Mailing Addresses

Office of Development:

Archdiocese of San Francisco
Office of Development
1 Peter Yorke Way
San Francisco, CA 94109-6602

Lockbox:

AAA
File 73363
P.O. Box 60000
San Francisco, CA 94160-3363

THE OFFICE OF DEVELOPMENT

The Office of Development of the Archdiocese of San Francisco is responsible for providing fundraising guidance and assistance to the parishes of the Archdiocese.

Services include:

Archbishop's Annual Appeal

Education Endowment

Planned Giving

Foundation Grants

Special Collections

Capital Campaigns

Demographic Data

Special Events

Credit Card Donations

Online Giving

OFFICE OF DEVELOPMENT

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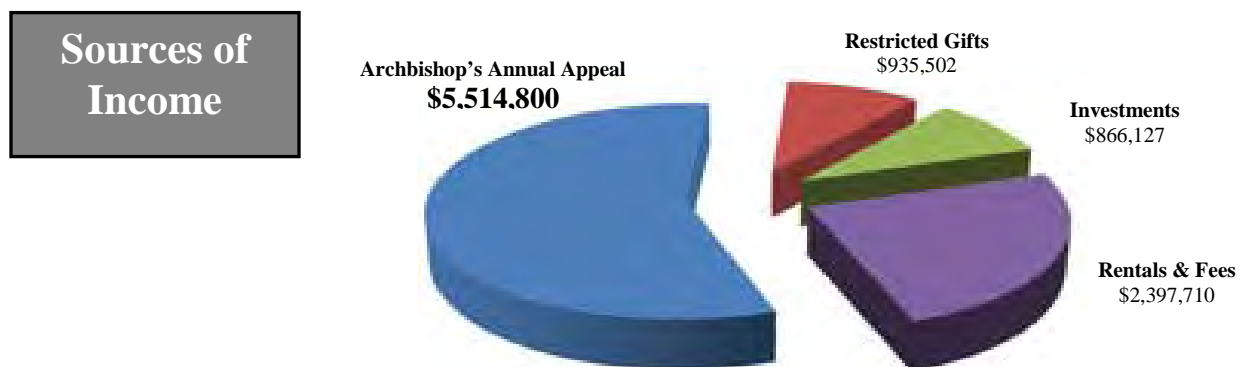
Development Associate

TWO-FOLD PURPOSE OF THE ANNUAL APPEAL

The purpose of the *Archbishop's Annual Appeal (AAA)* is to assist in funding the overall budget of the Archdiocese and to maintain awareness of needs beyond those serviced by the parish. Along with other funding sources, the AAA enables the Archbishop to provide ministries, programs and services that benefit all the parishes of the Archdiocese of San Francisco and to help people who are unaffiliated with any parish or even with the Church. The Appeal also allows parishioners to participate in the needs of the universal Church beyond the parish boundaries.

This year, the total budget of the Archdiocese is approximately \$10 million and the projected expenditure for the ministries and services that benefit Catholics and others in San Francisco, Marin, and San Mateo counties is approximately \$6.93 million. The total contribution required from all parishes for the *Archbishop's Annual Appeal 2011* to help fund those ministries and services is \$5.51 million. The *Archbishop's Annual Appeal* provides over half the total budget of the Archdiocese, including most of the money required to support the ministries and programs of the parishes, for Archdiocesan direct ministry and for centralized administrative services that benefit the parishes. The Annual Appeal also provides for support of our clergy and for our support of the Universal Church. The remainder of the Archdiocese's budget is funded by bequests, rental income, investment income and special gifts.

All contributions to this Archbishop's Annual Appeal 2011 campaign are "restricted funds". They must be used solely for the ministries and programs indicated.

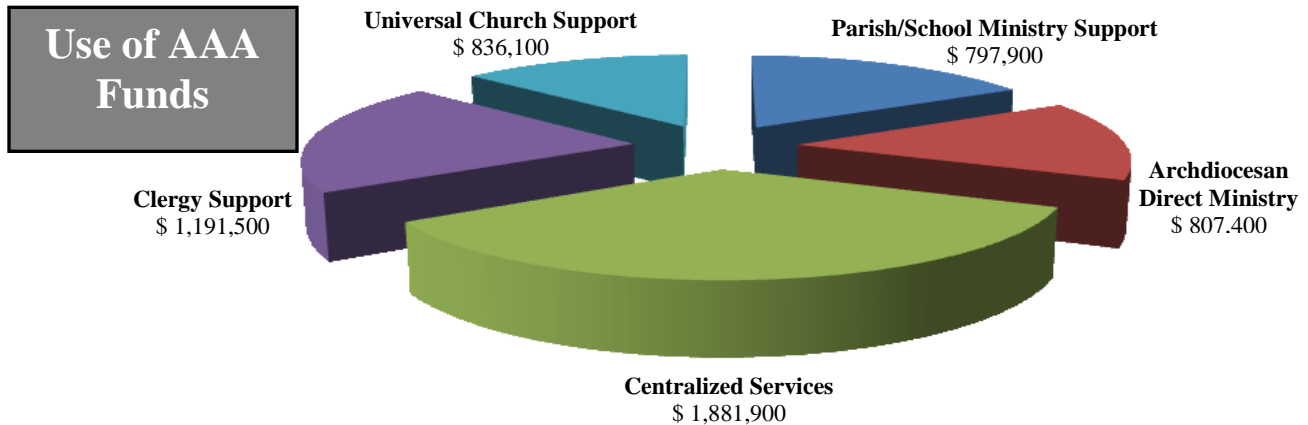


ARCHBISHOP'S ANNUAL APPEAL 2011

"From his fullness we have received, grace upon grace."

PURPOSE OF THE ANNUAL APPEAL *(continued)*

The ministries, programs and services provided by the Archdiocese include:



Ministries and Programs Supported

Parish / School Ministry Support

Parish and School subsidies, Department of Pastoral Ministry, Religious Education & Youth Ministry, Office of Worship, Marriage and Family Life, Respect Life, Family Grants, Teacher Incentive Grants, and Inner City Elementary schools.

Archdiocesan Direct Ministry

Ethnic Ministries, Ministry for Spanish-Speaking, Restorative Justice, ACCW, The Tribunal, Vicar for Spanish Speaking, Vicar for Filipinos, Ecumenical and Inter-religious programs, Office for Women Religious, Pastoral Ministry, Marriage & Family Life, Office of Public Policy & Social Concerns, Respect Life, Natural Family Planning, and Hospital Chaplains.

Centralized Services

Human Resources, Property Services, Real Estate, Archives, Finance, Payroll, Administrative Services, Development, Vallambrosa and Department of Cemeteries.

Clergy Support

Vicar for Clergy, Vocations, Office of Diaconate Formation, Permanent Diaconate, continuing education of priests, Priests Retirement Fund, Council of Priests, Auxiliary Bishops, and Serra Clergy House.

Support of Universal Church

Holy See, California Conference of Bishops, USCCB, *Catholic San Francisco*, *El Heraldo Catolico*, and Communications.

Programs, Ministries & Services Not Funded Through The AAA

TOTAL SERVICES & MINISTRIES:

Total Budget From AAA

\$1,002,200 \$ 797,900

\$1,014,100 \$ 807,400

\$2,363,700 \$1,881,900

\$1,496,600 \$1,191,500

\$ 1,050,200 \$ 836,100

\$3,106,700 \$ 0

\$10,033,400 \$5,514,800

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RAISING FUNDS

Every parish and mission church is assessed a share of the total Archdiocesan goal for the Annual Appeal. The Archbishop's Stewardship Council uses a formula and process to determine these assessments and each assessment is reviewed and approved by the Archbishop. The formula and the process were established by the Council of Priests and approved by the Archbishop. Parishes are notified of their assessment in the fall of each year in a letter from the Archbishop and are afforded an opportunity to challenge those assessments. It is the responsibility of the parish to remit the entire amount of the assessment by December 31 of the Appeal year.

Every parish is asked to present the needs of the Archdiocese to their parishioners and to conduct a campaign to obtain the money for the parish's assessment. The Office of Development provides tools for this campaign including posters, brochures, and envelopes. This also includes assistance and in-parish training. The campaign is advertised and featured in *Catholic San Francisco* and in *El Heraldo Catolico*.

ALL FUNDS CONTRIBUTED BY PARISHES IN EXCESS OF THEIR ASSESSMENT ARE RETURNED TO THOSE PARISHES FOR THEIR USE.

PLEDGE ADMINISTRATION

Archdiocese-Administered Donors:

The Archdiocese assists in the campaign by providing a pledge administration system. The parish asks parishioners to make individual determinations of the amount they will contribute to the Appeal and to complete a brief agreement stating the amount they will pay immediately or expect to pay by December 31, 2011. (Note: Pledge agreements are not legally binding.) In the parishes whose donors are administered by the Archdiocese, initial donations are received by the parish and forwarded to the Archdiocese via a Bank of America lockbox. Some donors prefer to pay in full at the time of the gift solicitation while others like to spread the payment over ten months. The Archdiocese acknowledges each gift, and mails monthly reminder notices to each parishioner who has completed a signed pledge agreement. Each reminder includes an envelope for the donor's use in remitting payment via the Bank of America lockbox. Parishioners may pay pledges monthly or at any time of their choosing, by check, money order or transfer of stock or other property. The Archdiocese also provides the IRS tax letters at year-end as required. Credit cards (*MasterCard and Visa only*) are accepted for via paper form for one-time contributions and online for multiple payments. Credit card gifts are processed by the Archdiocese and the Archdiocese pays all Credit Card fees associated with Credit Card donations.

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Self-Administered Parishes:

Some parishes have chosen not to have the Archdiocese administer their donors. These parishes administer contributions within the parish and make quarterly remittances to the Archdiocese. Parishioners' donations are accepted in the parish and deposited along with other offertory collections into the parish's account. These parishes are responsible for sending payment reminders to parishioners, acknowledging all gifts, and providing tax letters to parishioners at year-end. In addition, the Archdiocese will acknowledge any gift of \$250 or more if the parish provides the name and address of the donor and the amount of their gift. *(Self-administered parishes can accept one-time credit cards contributions via the AAA brochure by submitting these gifts to the Archdiocese. Note: Credit card gifts processed by the Archdiocese will not show up on the parish's monthly pledge statement, but will be on the AAA 2011 Monthly Report sent in the Archpak. If you have questions, please contact the Office of Development.)*

GIFT PLANS

Regardless of which pledge administration system your parish has chosen, it is a good idea to recommend a variety of specific gift plans to parishioners for their consideration. **For those parishes which start the Appeal by February or March**, to the right is an example of how the parishioners can pledge to your parish.

Another popular method is to ask each parishioner to contribute one hour's wage for each month of the year. In this instance, someone making \$ 20 per hour would make a gift of \$ 240. Paid in 10 installments, each payment would be \$ 24.

2011 Gift	Ten (10) Monthly Pledge Payments
\$ 2,000	\$ 200
\$ 1,000	\$ 100
\$ 500	\$ 50
\$ 300	\$ 30
\$ 100	\$ 10

MAKING THE ANNUAL APPEAL A SUCCESS

Each parish should form a *campaign committee* consisting of:

The Pastor & Parochial Vicars who provide enthusiastic advocacy on behalf of the Archbishop and encourage parishioners to support the Archbishop's Annual Appeal campaign.

The Parish Secretary or Appeal Coordinator who provides the administrative, managerial and accounting support to ensure that parishioners receive Archbishop's Annual Appeal materials and that all gifts are properly recorded and processed.

The Lay Chairperson(s) who lead(s) the campaign by speaking from the Podium and directing all activities necessary to ensure that every household in the parish receives a brochure and is asked to make a gift to the Archbishop's Annual Appeal.

REMEMBER: All funds in excess of the parish assessment are returned to the parish for its own use!

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AAA 2011 CALENDAR

This sample timetable can be adapted to the particular schedule that is appropriate for your parish. While it can be changed to meet parish needs, care should be taken to give parishioners the maximum time to pay pledges.

December 15-22, 2010

Campaign materials arrive at parish.
Parishes review to ensure orders are accurate.
Call the Office of Development (415) 614-5580 if there are discrepancies.

January 19, 20 & 21, 2011

Workshops on conducting the campaign and administering the Appeal will be done county by county at **10:00 am in San Mateo (Immaculate Heart of Mary), Marin (St. Sebastian), and San Francisco (St. Cecilia) counties, respectively**. All sessions are open to all, so that attendance can be based on time convenience rather than parish location (i.e., it is not necessary to attend in the County in which your parish is located). Leadership guides and CDs will be distributed at this meeting for attending parishes and mailed to non-attending parishes.

1st Parish Meeting

Pastor, Secretary and Chairpersons meet to plan 2011 Parish Campaign.

Prepare Pastor's Case Statement letter.* Secretary and/or volunteers prepare(s) envelopes or mailing labels to mail brochure to each household on parish list. This mailing should include the Pastor's Case Statement letter.

Week #1:

First Podium Announcement*

Pastor announces in-pew signup to take place on the following Sunday at all Masses; asks parishioners to come prepared to accomplish the task of raising the required funds.

Bulletin Announcement reinforces Pastor's announcement.*

Early in following week, Pastor's letter encouraging participation by all parishioners at a higher level of giving than prior years is mailed to all registered households with campaign brochure.

* A sample for each of these is available in the Pastor's Version of the Leader Guide.

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AAA 2011 CALENDAR (Continued)

Week #2:

Second Podium Announcement / Homily*

Homilist presents brief homily that provides exegesis of the day's scriptures, links to mission of Jesus and the Church and extols the need to support the Archdiocesan ministries and services

Chair Person / Couple present Annual Appeal needs from the Podium, ask support of all parishioners and **conduct in-pew signup**

Bulletin Announcement reinforces the needs of Archdiocese and how additional funds will be used in the parish

Staff prepares AAA worksheet and mails to Bank of America lock-box

Week #3:

Third Podium Announcement / Homily*

Pastor, Chair or Chair Couple presents progress report and asks for support from those who have not yet given.

Bulletin Announcement includes a written progress report

Repeat in-pew sign-ups if necessary.

Parish staff prepares AAA worksheet and mails to Bank of America lockbox

Week #4:

Thank You and Second Progress Report*

Pastor, Chair or Chair Couple thanks all who have given and asks support again from **non-donors**

Bulletin Announcement is progress report

Parish staff prepares AAA worksheet and forwards to Bank of America lockbox.

Follow-up.... A letter may be sent to all who have contributed to previous campaigns but have not yet made a gift to the current campaign.

* A sample for each of these is available in the Pastor's Version of the Leader Guide.

ADMINISTRATIVE PROCEDURES

1 - Parishes using the Archdiocesan Donor Administration System

Archdiocese-administered donors

Many parishes choose to have their donors and their contributions administered by the Archdiocese. This shifts much of the work and expense to the Archdiocese. The Archdiocese sends acknowledgements to all donors, monthly reminders to those who make pledges requiring subsequent payment and also sends year-end tax letters to qualifying donors (single gifts of \$250 or more). In addition, the Archdiocese will – upon request – send letters to all donors who donated in prior years but who have not made a contribution to the current campaign. The cost of supplies and postage is paid by the Archdiocese.

- The parish makes the appeal to potential donors. The parish provides the initial processing of gifts/pledges (except credit cards) and forwards to the **Bank of America lock-box**. The Archdiocese provides accounting, monthly billing, acknowledgement of all gifts and year-end tax letters.
- The Archdiocese maintains separate accounts on its computer system for each individual donor to the parish. The total gifts/commitments of all donors to the parish should equal or exceed the parish assessment by the end of the year, otherwise parish funds will be required to complete the assessment. The parish receives a monthly activity report called "**AAA 2011 GIFT SUMMARY REPORT**". Please be sure you receive a copy of this report each month from your Pastor and use this report to reconcile your donation records.
- Individual donors who make a paper (not an online) pledge will receive monthly reminders until their pledge is fulfilled (sent by the Archdiocese).
- Any donor who makes a single gift of \$250 or more will receive a year-end tax letter from the Archdiocese.

REMITTANCE FORM (FOUND AS A PART OF THE SELF-MAILING BROCHURES):

Verify that a TITLE or SALUTATION (Mr., Ms., Mrs., Miss) is included on each envelope. If not, consult parish records and add the appropriate title, as this helps differentiate parishioners with the same name.

MATCHING GIFTS:

- MATCHING GIFTS from an employer increase a parishioner's gift. Assist these donors to follow through and submit the necessary paperwork (more information follows on page 15).

SAFEGUARDS:

- Look at every check for the signature and the donor's ID number on the "Memo" line.
- Verify the written and numeric amounts agree.
- Make sure the check is not post-dated.
- Look for discrepancies between the check address and the address on the gift envelope. If different, verify the correct address and write this address on the gift envelope and on the worksheet.

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1 - Archdiocese-administered donors (continued)

- If the name on the check is different from the name on the gift envelope, record the donor's ID Number and name directly on the check.
- With couples, please be sure to include the first name of both spouses on both the remittance form and the worksheet, to ensure that donations are processed correctly.
- Make sure the payee is "Archbishop's Annual Appeal 2011" or the parish itself. If it is payable to the parish, deposit it to your parish account and include the amount in an **exchange check**. If payable to "Archbishop's Annual Appeal 2011", please list it on the donor worksheet and mail to the lockbox.
- We ask that an exchange check be provided for each AAA worksheet containing check or cash requiring an exchange (any item deposited at the parish and not forwarded to the Archdiocese) and that each item included in the **exchange check** be marked with an asterisk in the appropriate column.
- Correct any problems with the legibility of checks or the lack of required information by contacting the donor directly and obtaining a revised check before the gift is processed.

PREVIOUS DONOR:

Use the Annual Appeal MASTER LIST (provided in the February ArchPak) or the "AAA 2011 GIFT SUMMARY REPORT" (available in each month's ArchPak once the campaign has begun) to determine whether a donation is from a PREVIOUS DONOR (already on the **Master List – a listing of every donor from the previous 5 years' AAA campaigns for your parish**) or a NEW DONOR (not on the **Master List**).

PROCESSING PREVIOUS DONORS:

The **PREVIOUS DONOR AAA WORKSHEET FORM** (sample attached in appendix) is used to record donations from donors who appear on the **AAA MASTER LIST** or the **AAA 2011 GIFT SUMMARY REPORT** (this is an indication they have given to the Appeal in prior years). Record their **(7) seven-digit donor ID number**, last name, first name, total gift, and the amount enclosed - ***only include the address IF it has changed.*** **Note: *Different AAA worksheet forms are provided for donors paying by Credit Card versus those donors paying by check or cash.***

Write their Donor ID Number on the line provided on the gift remittance form. Verify that the address information on the MASTER LIST is correct. These gifts should be entered onto the **PREVIOUS DONOR AAA WORKSHEET FORMS**.

PROCESSING NEW DONORS:

If the parishioner's name does **NOT** appear on the MASTER LIST, this is a NEW DONOR. New donors will be assigned a Donor ID Number ***by the Archdiocesan Finance Department.*** These gifts are to be entered onto the **NEW DONOR AAA WORKSHEET FORMS**.

The NEW DONOR AAA WORKSHEET FORM is used to record donations from new donors who are not on the Annual Appeal MASTER LIST. Record their last name, first name, title, address, total gift, and the amount enclosed. (Again, the Archdiocese assigns all NEW DONORS a donor ID number).

NOTE: See page 14 for processing Credit Cards

ARCHBISHOP'S ANNUAL APPEAL 2011

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1 - Archdiocese-administered donors (continued)

NOTE: Checks associated with an AAA worksheet are to be wrapped inside their corresponding AAA worksheet. (It is best to tri-fold the worksheet around the checks listed.) These are always sent directly to the Bank of America Lockbox (more details on next page). An **exchange check** should replace all cash received or any check made out to the parish (with the donor's check being deposited by the parish into a parish account). **Please note each item included in the exchange check with an asterisk in the appropriate column and make one exchange check for each AAA worksheet submitted.** The AAA worksheets include a box where you fill-in the amount of the exchange check. **We also ask, as much as possible, please include all exchange check items on one worksheet and submit one exchange check, rather than spreading these items over several worksheets. Combining exchange check items aids the Finance Department with processing.**

NUMBERING OF AAA WORKSHEETS:

Number each AAA WORKSHEET form sequentially so you will know how many AAA worksheets you have submitted during the campaign and for easy reference if reviewed later. One sequence of numbers will suffice for all forms. Simply number them as you complete them. **We ask that each AAA worksheet is ONE batch and that there be one exchange check for each AAA worksheet, if necessary.** Copies of these sheets should be retained either electronically or on paper. If you file electronically, it is a good idea to name those files by date and AAA worksheet number.

SIGNATURE AND DATE:

The person submitting the information should include on the bottom of each AAA worksheet his/her name, the date on which the AAA worksheet has been prepared and the name and ID number of the Parish.

INCREASED OR ADDITIONAL GIFTS:

Increased or additional gifts beyond those fulfilling a pledge are each treated as one-time gifts.

CASH:

NEVER SEND CASH IN THE MAIL! If you receive cash from a donor, issue an exchange check from the parish. Exchange Checks may include cash from more than one donor on the same AAA worksheet. **There must, however, be a separate Exchange Check for each AAA worksheet.** Please write the donor's donor ID number on the check and on the AAA worksheet. This will ensure credit to the proper donor and parish.

BLACK AND WHITE PROCESSING FORMS (NEW FOR 2011):

Many parishes have asked us about forms that print in black and white, in order to save on color ink for their printers. On your AAA 2011 CD or on the Office of Development website, you can find forms that will print in black and white by choosing the appropriate processing form template with "bw" at the end of the file name. While the Excel file appears on the screen in color, it should print in only black ink.

Remember:

**1 WORKSHEET = 1 EXCHANGE CHECK
1 WORKSHEET = 1 BATCH**

ARCHBISHOP'S ANNUAL APPEAL 2011

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1 - Archdiocese-administered donors (continued)

CREDIT CARDS:



(Only MasterCard and Visa are accepted)

Payment by MasterCard or Visa Credit Card is acceptable for one-time gifts via the paper form or one-time and recurring payment gifts online. (Credit cards are NOT acceptable when making a pledge via the paper form for which there will be multiple payments. For more information concerning online giving, please see the next page.)

**It is very important that the remittance slips are totally and accurately completed and signed or credit card payments cannot be processed.
In such cases, the parish will be called and is responsible for contacting the donor.**

Credit Card Processing (Continued)

The parish collects and verifies AAA Remittance forms for each payment by credit card, and enters the data onto the "CREDIT CARD AAA WORKSHEET FORMS", either as a PREVIOUS DONOR or a NEW DONOR. **Note: DO NOT include the Credit Card number on the CREDIT CARD AAA WORKSHEET FORM.** The completed CREDIT CARD AAA WORKSHEET FORMS (see samples in the appendix) and the ORIGINAL (NO PHOTOCOPIES), signed remittance forms **must be submitted to the Office of Development (One Peter Yorke Way, San Francisco, CA 94109).** (This is similar to the way checks are logged onto AAA worksheets and submitted except checks are mailed to the Lockbox.) **The originals of the signed remittance forms must accompany the AAA worksheets, as they must be maintained by the agency that accepted the credit card for payment, in this case, the Archdiocese.** Only Visa and MasterCard are accepted. Card number, telephone number, address, city, zip code and expiration date are all required along with the donor's signature.

Every credit card submittal must have an AAA Remittance form with all information in order for the Credit Card payment to be acceptable.

Reminders:

PLEASE SEND CREDIT CARD SLIPS AND THEIR ASSOCIATED CREDIT CARD AAA WORKSHEETS DIRECTLY TO THE OFFICE OF DEVELOPMENT AT THE ARCHDIOCESE, NOT TO THE LOCKBOX!

PLEASE GUARD CREDIT CARD INFORMATION CAREFULLY – NO ONE WANTS IDENTITY THEFT!

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Online Giving: Be sure to tell your parishioners of this great opportunity!

In 2010, the Archdiocese of San Francisco began accepting online credit card and direct debit (electronic transfer from a bank account) donations. Through online giving, a donor may give either a one-time gift or a monthly recurring gift using a credit card or via direct debit from a bank account. In 2011, we have expanded this opportunity to all Archdiocesan-administered parishes (although a few have chosen not to participate). **If you are a participating parish, please be sure to let your parishioners know of this exciting opportunity to donate through your bulletin and pulpit announcements!**

SUBSEQUENT DONOR PAYMENTS (payments received at the parish after the initial pledge):

The parishioner should make these payments directly to the lockbox in the envelopes provided with their monthly AAA statements and reminders, using the materials provided. Should subsequent payments be received directly at the parish, write the account number on the face of the check. You can obtain the account number from the AAA 2011 Gift Summary (the monthly list of donors provided by the Office of Development), from the MASTER LIST provided when the campaign begins, or from your AAA worksheets. Be careful that you do not mistake these subsequent payments as new donor gifts - marking them as new donors is likely to cause the assignment of a second new Donor ID and payment may not be properly applied. Indicate any change of address on the AAA Previous Donor Worksheet.

CHANGE OF ADDRESS:

It is important that the Offices of Development be notified immediately with updated information in case of a change of address, death of a donor, or if the donor moves from the parish. Call (415) 614-5580, fax (415) 614-5584, or email development@sfarchdiocese.org the Development office.

SUBMITTING AAA WORKSHEETS:

Once you have completed filling out AAA worksheets from the gift remittance forms, write the Donor ID Number on the checks and submit with the AAA worksheet to the following address:

Checks:

AAA
File 73363
P.O. Box 60000
San Francisco, CA 94160-3363

Credit Cards:

Archdiocese of San Francisco
Office of Development
One Peter Yorke Way
San Francisco, CA 94109

MATCHING GIFTS:

Employers often match their employee's gift. The donor may indicate this on the gift remittance form. The donor should be asked to forward the necessary paperwork from the employer to the Archdiocesan Office of Development for completion. Matching gifts are a way for the parish to increase, and sometimes even double, a donation. It is wise to make sure your parishioners know that this is a possibility for them to additionally help the parish.

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Archdiocese-administered donors (continued)

PLEASE SEND CHECKS AND AAA WORKSHEETS TO THE BANK OF AMERICA LOCKBOX AND NOT TO THE OFFICE OF DEVELOPMENT, AS THAT WILL DELAY PROCESSING! !

STOCK DONATIONS:

Instructions for the donation of stock are attached and can be given to any donor who wishes to donate stock. If there are any questions, please call John Marty, our broker whose information is on the form. Though the donor is instructed to fax the authorization letter to our broker, the Offices of Finance and Development must be notified immediately of stock transfers. Complete the stock donor form and fax it to the Office of Development (415) 614-5584 and to Finance (Mary Connolly) at (415) 614-5522. *The donor should contact John Marty at Sloan Investment Advisors, at (650) 825-9013.*

**** See pages 28-29 for more information. ****

2 - Parishes that Self-Administer Their Donors

Some parishes choose to administer their own donors and their pledges. These parishes process all donor checks, cash and credit card donations at the parish, along with other offertory monies, as well as being responsible for all donor acknowledgment.

INTERACTION WITH THE ARCHDIOCESE:

Parishes that self-administer their donors have one account in the Archdiocese donor administration computer system and it is established in the name of the parish. The Archdiocese records the parish's 2011 assessment as its "pledge" so that the parish will receive a monthly reminder from the Archdiocese, just as individual donors do in parishes that utilize the Archdiocese donor administration system. **(Note: Credit Cards, if processed by the Archdiocese, cannot be applied to the parish's pledge balance that is sent on the monthly reminder notice. However, credit card gifts will be applied to the balance shown on the AAA 2011 monthly report. Please check the monthly report balance before making any payments and if you have any questions, please contact the Office of Development.)**

PROCESSING GIFTS:

Individual gifts are processed and deposited by the parish into its own bank account. These parishes are to make quarterly payments to the Archdiocese. These payments should be mailed, along with the remittance slips provided monthly by the Archdiocese, **TO THE BANK OF AMERICA LOCKBOX.**

PARISH RESPONSIBILITIES:

The parish provides acknowledgements of gifts to its donors and monthly pledge reminders to its pledging donors. The parish must also provide a tax letter to any donor who makes a single gift of \$250 or more. Accurate parish records are critical to insure IRS compliance, to maintain donor satisfaction and to measure the effectiveness and financial impact of the Appeal.

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CREDIT CARDS:

Credit card payments will be processed according to parish guidelines. **If the parish is not equipped to accept credit cards, one-time gifts via the paper donation form can be processed by the Archdiocese**.** Credit card gifts are logged onto special "AAA worksheets" provided by and submitted *directly* to the Archdiocese (**NOT to the Bank of America lockbox**) (See the section on page 14, under Archdiocesan administered donors, and the sample forms for specific instructions). Credit Card processing fees to the bank will be paid by the Archdiocese.

For the 2011 Archbishop's Annual Appeal campaign, self-administered parishes are not eligible to participate in the Archdiocesan system for online donating. For more information about this project or how to offer online giving at your parish, please contact the Office of Development.

MATCHING GIFTS:

Employers often match their employee's gift. The donor should indicate this on the remittance form. The donor should be asked to forward the necessary paperwork from the employer to the parish. The parish should complete the section of the paperwork relating to the date and amount of the gift. The parish should then forward the paperwork and proof of donation (church record or receipt) to the Archdiocesan Office of Development, who will complete the paperwork and submit to the proper destination. For questions or more details, please contact Florian at (415) 614-5537. Matching gifts are a great way for the parish to increase or even double a donation, so be sure to make your parishioners aware of this possibility!

STOCK DONATIONS:

Instructions for the donation of stock are attached and can be given to any donor who wishes to donate stock. If there are any questions, please call John Marty, our broker whose information is on the form. Though the donor is instructed to fax the authorization letter to our broker, the Offices of Finance and Development must be notified immediately of stock transfers. Complete the stock donor form and fax it to the Office of Development (415) 614-5584 and to Finance (Mary Connolly) at (415) 614-5522. ***The donor should contact John Marty at Sloan Investment Advisors, at (650) 825-9013.***

**** See pages 28-29 for more information. ****

It is very important that the AAA brochure remittance slips for credit card gifts are totally and accurately completed and signed, or credit card payments cannot be processed.

***** Call the Office of Development (415) 614-5580 for information on attaining the ability to take contributions via Visa or MasterCard or via direct debit (ACH).***

ARCHBISHOP'S ANNUAL APPEAL 2011

"From his fullness we have received, grace upon grace."

FREQUENTLY ASKED QUESTIONS

- Q. Will any of the money donated be used by the Archdiocese to settle sex abuse cases?**
A. NO! All contributions to the Archbishop's Annual Appeal are "restricted funds". Therefore, by law, they must be used solely for the ministries and programs listed in this manual and in the campaign brochure.
- Q. Who is responsible for donor acknowledgment?**
A. Parishes that manage their own donors are responsible for thanking all those donors and are encouraged to be diligent in doing so. For parishes whose donors are managed by the Archdiocese, the Archdiocese will acknowledge all donations.
- Q. Can donors of \$250 or more in parishes that self-administer their donors receive a thank-you letter from the Archdiocese?**
A. Yes. Provide the donor information (name with title, address, amount of gift) to the Office of Development.
- Q. Who is responsible for providing tax letters to AAA donors?**
A. For self-administered parishes, the parish must provide tax letters to all donors who make single gifts of \$250 or more. The Archdiocese sends tax letters to donors for parishes that use the Archdiocesan donor administration system. Tax letters must be mailed by January 31 for the prior year's donations.
- Q. What if a donor pledges \$100 but later decides to give more?**
A. Parishes administered by the Archdiocese should send the payment to the Bank of America lockbox. Be sure to write the donor's name and Donor ID Number on the check so that the donation can be credited to the correct donor and the parish. Offertory parishes will deposit the gift to the parish account, acknowledge it, and include it in the year-end tax receipt processing.
- Q. Can a donor give via a stock transfer to the Archbishop's Annual Appeal?**
A. Yes, you or your donor can call the Office of Development or the Finance Office of the Archdiocese for the necessary information to facilitate a gift of stock. Donors should call:
- John Marty at Sloan Investment Advisors, at (650) 825-9013**
- the broker for the Archdiocese, to arrange a transfer of shares of stock. Parishes should then fax the GIFT OF STOCK form to the Office of Development (415) 614-5584 and to the Office of Finance (Mary Connolly) at (415) 614-5522.
- Q. Can our parish take advantage of IRA Donations for the Archbishop's Annual Appeal?**
A. Currently, no, as this form of giving expired on December 31, 2009. Previously, potential donors aged 70½ and above were able to make charitable donations of up to \$100,000 from IRAs and Roth IRAs without having to count the distributions as taxable income. If this donation method is renewed, the Office of Development will update you.
- Q. Can parishioners donate to the Annual Appeal online?**
A. Yes, for participating parishes. For 2011, the Archdiocese offers online credit card and direct debit donation capabilities for all Archdiocesan-administered parishes who would like to participate. Other parishes may offer this ability through their own online donation system.
- Q. If our parish needs help with the Annual Appeal is it available?**
A. Yes. The Office of Development is available to meet with pastors, staff and Annual Appeal Committees. Call (415) 614-5580 to schedule an appointment.

FUNDAMENTALS FOR SUCCESS

- Start your campaign in February or March to allow 10 months of pledge payments.
 - Form a committee consisting of the Pastor and respected parish leaders.
- Establish goals for dollars to be donated and for number of donors to participate. Base your goals on an increase in the dollars contributed last year and on the number of donors to last year's campaign (*e.g., increase by 10% the average amount of each donation, increase the number of donors by 25%, etc.*).
 - Prepare a strong and attractive case for the Archdiocese and the parish.
- Send a letter with brochure to every registered family and stress the parish's desire to have maximum participation.
 - Send a second "follow-up" letter. Stress parish needs.
 - Pastor gives first homily / presentation.
 - Pastor or lay leaders give Podium talk ***and conduct in-pew signup.***
 - Volunteers distribute promotional materials during or after Mass.
 - Display posters in prominent, appropriate places.
 - Call attention to the "thermometers" to show progress.
 - Provide examples of how parish benefits from Archdiocese services.
 - Encourage conversation among parishioners about the Appeal.
 - Explain specific gift plans (one hour's wage for each family member, (\$ 2,000, \$ 1,000, \$ 500, \$ 100, etc.)
- Explain one-time gifts, pledges and the monthly reminder system, and how to handle payments (to the parish or to the Archdiocesan lock box at Bank of America).
 - Recommend parishioners check with employers regarding matching gifts.
 - Ask parishioners to increase their giving each year.
 - Follow the timetable.
 - **Ask for help when you need it. Call the Office of Development** at (415) 614-5580 –or- email us at: development@sfarchdiocese.org

ARCHBISHOP'S ANNUAL APPEAL 2011

"From his fullness we have received, grace upon grace."

2011

AAA New Donor Worksheet Instructions

NEW DONOR FORM NUMBER _____

New Donors <i>Paying by cash, check or money order</i>					
AAA Office Use Only	First & Last Names of both husband and wife <i>(include Salutation)</i>	Address (Required field for all NEW donors)	New Amount Pledged	Amount Enclosed	Exchange Check (Mark with *)
1					
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9	All shaded areas are to be filled- in.				
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13					
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15					
16					
17					
18					
19					
20					
			FORM TOTALS:	\$ - \$ -	

Leave this column blank for new donors

Provide an appropriate title for each new donor (e.g., 'Mr. and Mrs.', 'Ms.', 'Dr. and Mrs.', etc.)
PLEASE include both husband and wife's first names.

Record New Pledges Only.
If payment enclosed is a 'one time' cash gift, then leave this space blank.
If payment enclosed is a SUBSEQUENT pledge payment, then leave this space blank.
If pledge amount & amount enclosed are the same - PLEASE do not enter the pledge amount into this column

Record payments enclosed with form.
Mark each row included on exchange check with an asterisk. Leave blank if not included on exchange check.

IMPORTANT:
Keep photocopies of all submitted forms for your files. This will assist in identifying and correcting any errors that might arise.
(If using electronic version, "save as" each form, naming appropriately.)

Form Total: Total from this page go here. (If using electronic version - ti calculates automatically.)

DATE: _____
PARISH NAME & NR: _____
PREPARED BY: _____

Amount of the exchange check for this batch sheet: _____

Mail To: AAA 2010, File 73363, P.O. Box 60000, San Francisco, CA 94160-0000

Please: Only one exchange check per sheet & one sheet per exchange check!

Type in this sheet's exchange check amount in this cell

ARCHBISHOP'S ANNUAL APPEAL 2011
"From his fullness we have received, grace upon grace."

2011

AAA New Donor Worksheet

NEW DONOR FORM NUMBER _____

<i>New Donors</i> Paying by cash, check or money order					
AAA Office Use Only	First & Last Names of both husband and wife (include Salutation)	Address (Required field for all NEW donors)	New Amount Pledged	Amount Enclosed	Exchange Check (Mark with *)
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FORM TOTALS:			\$ -	\$ -	-

DATE: _____
 PARISH NAME & NR: _____
 PREPARED BY: _____

Amount of the exchange check for this batch sheet:

Mail To: AAA 2010, File 73363, P.O. Box 60000, San Francisco, CA 94160-3363

ARCHBISHOP'S ANNUAL APPEAL 2011

"From his fullness we have received, grace upon grace."

2011

AAA Previous Donor Instructions

Previous Donors		PREVIOUS DONOR FORM NUMBER			
Donor ID (Must be Provided)	First & Last Names of both husband and wife (include Salutation)	ADDRESS (Note ONLY address changes)	Amount Pledged	Amount Enclosed	Exchange Check (Mark with *)
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20					
FORM TOTALS:					
DATE:					
PARISH & #					
PREPARED BY:					

↑
Add the previous donor number in this column

↑
Use this column exclusively for address changes only

↑
Record payments enclosed with form.

↑
Provide an appropriate title for each donor (e.g., 'Mr. and Mrs.', 'Ms.', 'Dr. and Mrs.', etc.)
PLEASE include both husband and wife's first names.

↑
Record New Pledges Only.
If payment enclosed is a 'one time' cash gift, then leave this space blank.
If payment enclosed is a SUBSEQUENT pledge payment, then leave this space blank.
If pledge amount & amount enclosed are the same - PLEASE do not enter the pledge amount into this column

↑
Mark each row included on exchange check with an asterisk. Leave blank if not included on exchange check.

IMPORTANT:
Keep photocopies of all submitted forms for your files. This will assist in identifying and correcting any errors that might arise. (If using electronic version, "save as" each form, naming appropriately.)

All shaded areas are to be filled-in.

Form Total: Total from this page goes here. (If using electronic version - this calculates automatically.)

Amount of the exchange check for this batch sheet:

Mail To: AAA 2010, File 73363, P.O. Box 60000, San Francisco, CA 94160-3363

Please: Only one exchange check per sheet & one sheet per exchange check!

Type this sheet's exchange check amount in this cell

ARCHBISHOP'S ANNUAL APPEAL 2011
"From his fullness we have received, grace upon grace."

2011

AAA Previous Donor Worksheet

PREVIOUS DONOR FORM NUMBER _____

Previous Donors paying by cash, check or money order

	Donor ID (MUST BE PROVIDED)	First & Last Names of both husband and wife (include Salutation)	Note: ONLY Address Changes in this column	New Amount Pledged	Amount Enclosed	Exchange Check (Mark with *)
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	FORM TOTALS:			\$ - -	\$ - -	- -

DATE: _____
 PARISH & #: _____
 PREPARED BY: _____

Amount of the exchange check for this batch sheet:



Mail To: AAA 2010, File 73363, P.O. Box 60000, San Francisco, CA 94160-3363

ARCHBISHOP'S ANNUAL APPEAL 2011

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2011

AAA New Donor Credit Card Worksheet Instructions

New Donors Paying by Credit Card CREDIT CARD		NEW DONOR FORM NUMBER	
<p><i>NOTE: A completed, readable pledge form, signed by the donor, must be provided for each entry on this form. The amounts shown on all such pledge forms and the total thereof, must exactly match what is shown on this form.</i></p>			
Donor ID (Leave Blank)	First & Last Name (include Salutation)	ADDRESS	Amount to be Charged
1			
2			
3			
4		Only VISA & MasterCard accepted	
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
			FORM TOTALS:
			BATCH TOTALS:
DATE:			
PARISH & #:			
PREPARED BY:			

Leave this column blank for new donors

Provide an appropriate title for each donor (e.g., 'Mr. and Mrs.', 'Ms.', 'Dr. and Mrs.', etc.)

IMPORTANT:
Keep photocopies of all submitted forms for your files. This will assist in identifying and correcting any errors that might arise.
(If using electronic version, "save as" each form, naming appropriately.)

NOTE:
An accurately completed credit card form must accompany every credit card entry on this form.

All shaded areas are to be filled-in.

Form Total: Total from this page goes here. (If using electronic version - this calculates automatically.)

Mail To: Office of Development, Archdiocese of San Francisco,
1 Peter Yorke Way, San Francisco, CA 94109

ARCHBISHOP'S ANNUAL APPEAL 2011
"From his fullness we have received, grace upon grace."

2011

AAA New Donor Credit Card Worksheet

New Donors Paying by Credit Card CREDIT CARD		  VISA & MasterCard ONLY	NEW DONOR FORM NUMBER
NOTE: A completed, readable pledge form, signed by the donor, must be provided for each entry on this form. The amounts shown on all such pledge forms and the total thereof, must exactly match what is shown on this form.			
Donor ID (Leave Blank)	First & Last Name (include Salutation)	ADDRESS	Amount to be Charged
1			
2			
3			
4			
5			
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FORM TOTALS:			\$ -
DATE:			
PARISH & #:			
PREPARED BY:			

**Mail To: Office of Development, Archdiocese of San Francisco,
 1 Peter Yorke Way, San Francisco, CA 94109**

ARCHBISHOP'S ANNUAL APPEAL 2011

"From his fullness we have received, grace upon grace."

2011

AAA Previous Donor Credit Card Worksheet Instructions

Previous Donors Paying by Credit Card CREDIT CARD		PREVIOUS DONOR FORM NUMBER
NOTE: A completed, readable pledge form, signed by the donor, must be provided for each entry on this form. The amounts shown on all such pledge forms and the total thereof, must exactly match what is shown on this form.		
Donor ID (MUST BE PROVIDED)	First & Last Names of both husband and wife (include Salutation)	ADDRESS (Note ONLY address changes)
1		
2		
3		
4		
5		
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7		
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		FORM TOTALS:
DATE:		
PARISH & #:		
PREPARED BY:		

Add the previous donor number in this column

Provide an appropriate title for each donor (e.g., 'Mr. and Mrs.', 'Ms.', 'Dr. and Mrs.', etc.)
PLEASE include both husband and wife's first names.

Use this column exclusively for address changes only



NOTE:
An accurately completed credit card form must accompany every credit card entry on this form.

IMPORTANT:
Keep photocopies of all submitted forms for your files. This will assist in identifying and correcting any errors that might arise.
(If using electronic version, "save as" each form, naming appropriately.)

All shaded areas are to be filled-in.

Form Total: Total from this page goes here. (If using electronic version - this calculates automatically.)

Mail To: Office of Development, Archdiocese of San Francisco, 1 Peter Yorke Way, San Francisco, CA 94109

ARCHBISHOP'S ANNUAL APPEAL 2011
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2011

AAA Previous Donor Credit Card Worksheet

Previous Donors Paying by Credit Card CREDIT CARD		  VISA & MasterCard ONLY	PREVIOUS DONOR FORM NUMBER
NOTE: A completed, readable pledge form, signed by the donor, must be provided for each entry on this form. The amounts shown on all such pledge forms and the total thereof, must exactly match what is shown on this form.			
Donor ID (MUST be provided)	First & Last Names of both husband and wife (include Salutation)	ADDRESS	Amount to be Charged
1			
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FORM TOTALS:			\$ -
DATE:			
PARISH & #:			
PREPARED BY:			

**Mail To: Office of Development, Archdiocese of San Francisco,
 1 Peter Yorke Way, San Francisco, CA 94109**

ARCHBISHOP'S ANNUAL APPEAL 2011
"From his fullness we have received, grace upon grace."

Date: _____

Mr. John Marty
Sloan Investment Advisors
700 Airport Blvd. Suite 410
Burlingame, CA 94010

Re:

Dear Mr. Marty:

Please accept this as your authorization to deposit _____ shares of
_____ stock into account no. 926-00319, Roman Catholic Archbishop of
San Francisco.

This donation is for the benefit of _____ Parish/School.

This transfer is being made without valuable consideration, and I hereby agree to hold you harmless in
this matter.

Sincerely,

Customer Signature

Joint Customer Signature

Phone Number: _____

Fax copy to Mary Connolly at (415) 614-5522 and the Office of Development at (415) 614-5584.

ARCHBISHOP'S ANNUAL APPEAL 2011

"From his fullness we have received, grace upon grace."

ARCHBISHOP'S ANNUAL APPEAL 2011 ASSESSMENT PROCESS

The pastors of the Archdiocese have agreed that 16.85 % of the aggregate ordinary income of the parishes of the Archdiocese will be provided to fund Archdiocesan ministries and programs that support the work of all the parishes. Pastors devised this process of assessment to fairly distribute that target amount among the parishes. It is overseen by the Archbishop's Stewardship Council composed of one pastor from each of the eleven deaneries plus Monsignor James T. Tarantino, Vicar for Administration and Moderator of the Curia.

Each parish starts with an assessed percentage of 16.85% of ordinary income. Percentage points are added to or subtracted from that beginning percentage according to the contributing factors below:

DEMOGRAPHICS – The parishes are scaled by Average House Hold Income (high income to low income) as reported in the most recent U.S. Census, and are separated into fifths, or quintiles. To the parishes in the highest quintile, 3 percentage points are added to their assessment percentage. Those in the next quintile down have 2% added, the middle quintile gets no adjustment, the fourth quintile (of five) has 1% subtracted from their assessment percentage and the parishes in the lowest quintile have 6% subtracted. This provides support to the parishes in the most economically deprived areas. These numbers change once every five years, either with the release of a new census or at the midway point based upon a projection created by outside statistical consultants. *(This projection occurred in 2007 and is reflected in the 2011 Assessments).*

EXTRAORDINARY INCOME – Parishes that have either investment or rental income in excess of 6% of ordinary income are assessed an additional 1%. *(Only 1% is added even for those parishes with BOTH investment and rental income in excess of 6% of ordinary income.)*

HIGH DEBT SERVICE – Parishes that paid more than 10% of ordinary income as interest and principal on a debt receive a minus 1%.

SCHOOL SUPPORT – Parishes with schools get a minus 1% while those without schools get a plus 1%, a difference of 2% for having a school vs. not having one.

MAJOR CAPITAL PROJECTS – Parishes with major capital projects that create a hardship for the parish may get a minus 1%.

SPECIAL CONSIDERATION – Parishes may get from minus 1% to minus 7% if they require special consideration for situations or circumstances at the parish.

After these formula changes are made, a further step is taken to eliminate the deficit between the total assessments and the Archdiocesan goal, as well as to create the pool available to grant appeals. This is done by dividing the needed amount of money (assessment deficit + needed appeal pool) by the total amount of assessments at this point. Each parish's dollar assessment is then multiplied by this percentage (around 3%) and this amount is added to each parish's assessment to make up the deficit and to create the appeal pool.

Subjective adjustments by the Stewardship Council are used to ensure fairness and to accommodate specific current situations. Large increases or decreases may be phased in over a multiple year period. Finally, a maximum of 20.85 % and a minimum of 10.85 % will apply. Each parish's resulting assessment percentage is multiplied by its ordinary income as reported on Schedule 11 to determine its proposed assessment.

Once Archbishop Niederauer has reviewed and approved the list of proposed assessments, the results are published to the pastors. The pastors are also given a date on which assessment appeals will be heard. Appeals should include strong statements of current need that are not reflected in the parish financial statements. In addition, any appeal pool money remaining after all appeals are granted is refunded to parishes. After the appeals process, Archbishop Niederauer again reviews and approves the final assessments. The total assessment across the Archdiocese must be 16.85% of total Archdiocesan-wide ordinary income.

ARCHBISHOP'S ANNUAL APPEAL 2011
"From his fullness we have received, grace upon grace."

San Francisco			Marin		
St. Mary's Cathedral	101	54,000	St. Rita Church	201	39,900
St. Agnes Church	103	69,900	St. Sebastian Church	203	58,000
St. Anne of the Sunset	105	48,000	St. Cecilia Church	205	6,100
St. Anthony of Padua	107	23,900	St. Mary Nicasio	207	4,700
St. Boniface Church	109	17,500	St. Patrick Church	209	66,500
St. Brendan Church	111	118,500	Our Lady of Mount Carmel	211	60,400
St. Cecilia Church	113	118,700	St. Anthony of Padua	212	87,100
St. Charles Borromeo Church	115	20,200	Our Lady of Loretto Church	213	104,400
Corpus Christi Church	116	45,000	Sacred Heart Church	215	16,700
St. Dominic Church	117	202,600	St. Anselm Church	219	84,500
St. Elizabeth Church	120	29,300	St. Raphael Church	221	129,300
St. Emydius Church	121	38,800	St. Mary Star of the Sea	231	28,500
Church of the Epiphany	123	80,800	St. Isabella Church	233	98,900
St. Finn Barr Church	124	27,200	St. Hilary Church	235	112,100
St. Benedict Parish	127	4,700	Assumption of Mary	237	7,600
St. Gabriel Church	128	89,700	St. Helen Mission	241	2,100
Holy Family Mission	131	5,100			
Holy Name of Jesus Church	132	53,300	San Mateo		
St. Ignatius Church	133	154,100	Immaculate Heart of Mary	301	87,700
St. James Church	136	18,000	St. Mark Church	302	42,000
St. John Evangelist Church	137	29,300	St. Catherine of Siena	303	121,300
St. John of God Church	138	13,950	Our Lady of Angels Church	305	178,400
St. Kevin Church	140	23,200	Holy Angels	307	60,700
Old St. Mary Church	141	26,700	St. Andrew Church	308	55,100
St. Michael Korean Church	143	44,600	Our Lady of Mercy Church	309	71,300
Mission Dolores Basilica	144	30,100	Our Lady of Perpetual Help	311	31,500
St. Monica Church	145	50,000	St. Francis of Assisi Church	313	26,750
Most Holy Redeemer Church	147	53,600	St. Luke Church	314	61,400
Church of the Nativity	148	15,800	Our Lady of the Pillar	315	58,600
Notre Dame Des Victoires	149	40,800	St. Anthony Pescadero Msn	319	3,100
Our Lady of Lourdes Church	152	15,900	Our Lady of Refuge	321	2,500
St. Patrick Church	153	48,400	St. Anthony Church	323	43,400
St. Paul Church	155	59,100	St. Denis Church	325	86,000
St. Paul of the Shipwreck	156	19,600	Church of the Nativity	327	119,800
St. Peter Church	157	21,500	St. Raymond Church	329	58,900
Sts. Peter and Paul Church	159	50,500	St. Dunstan Church	331	85,600
St. Philip the Apostle Church	160	42,400	Good Shepherd	333	50,600
Star of the Sea Church	163	32,900	St. Peter Church	335	67,600
St. Stephen Church	164	62,500	Our Lady of Mount Carmel	341	68,200
St. Teresa Church	165	26,600	St. Matthias Church	343	64,100
St. Thomas the Apostle	167	23,400	St. Pius Church	345	119,400
St. Thomas More Church	168	53,400	St. Bruno Church	347	36,300
St. Vincent De Paul Church	169	107,000	St. Robert Church	349	86,200
Church of the Visitacion	171	33,200	St. Charles Church	351	112,900
OL of Guadalupe	173	4,100	St. Bartholomew Church	353	149,200
			St. Gregory Church	355	111,700
			St. Matthew Church	359	107,500
			St. Timothy Church	361	49,400
			All Souls Church	363	55,800
			St. Augustine Church	364	88,400
			Mater Dolorosa Church	365	48,300
			St. Veronica Church	367	50,500

Archdiocesan Total
\$5,514,800