



Sharing our Blessings

THE INCREASED OFFERTORY INITIATIVE FOR
THE PARISHES OF THE DIOCESE OF WORCESTER

Parish Program Manual
Section I

Introduction, Plan, Leadership Roles & Policies

Revised 6/1/10

TABLE OF CONTENTS

Introduction	4
Program Timetable	6
Leadership and Staff Roles	6
Leadership Recruitment Guide.....	6
Program Policies	6

Introduction

INTRODUCTION TO *SHARING OUR BLESSINGS*

This manual is being provided to each parish in order to outline the details of how the effort will be conducted in their parish. Additional training materials will be provided to the Team Captains and Program Advocates.

Sharing Our Blessings is an increased giving program that will directly address the local needs of each parish in the Diocese of Worcester.

All is a gift from God: everything we are and have is freely given from God, without condition or reservation. In gratitude of this truth, we believe in giving back to our God and His Church all that we can of our time, our abilities, and our personal possessions.

Through the dedicated efforts of many volunteers, and a sincere and thorough education process, each parishioner's commitment in the *Sharing Our Blessings* program will successfully culminate in:

- an immediate increase in the Sunday collections.
- attainment of a model program that can be continuously renewed for future parish growth and budgeting.

Our goal is to realize at least a 20-25% increase in offertory income for each parish in the Diocese of Worcester. Clearly, the actual results at each parish will depend on:

- the existence and acceptance of a real financial need by the parishioners.
- the leadership and active participation of Parish Staff, General Chairpersons, Program Secretaries, Team Captains and Program Advocates.
- a willingness by all to explain a parish's financial situation in a dignified manner and to ask families to commit to an increase in the level of their regular offertory support.
- the implementation of electronic giving systems at the parish level and the willingness of parishioners to commit to regular, automatic financial support.
- the following of the overall plan and implementation of a structured Education Phase culminating in a well-coordinated Commitment Weekend.

WHAT TO EXPECT – PLANNING PHASE

Fall 2010 Schedule:

Flight One: August 30th through November 7th

Flight Two: October 3rd through December 12th

Preparation:

In order for the program to be successful, detailed preparation will be needed several months prior to the program start date. The majority of the Pastor's and Chair's work will take place 4-6 weeks prior to Week 1 of the public program. The Program Director (CCS counsel) will be in contact with the pastor, parish secretary and Chairperson several times a week during this timeframe to ensure the process runs smoothly and to provide hands on assistance when needed. Some parishes may begin the preparation process in May or June to avoid summer scheduling conflicts.

Once the active program begins, the Pastor's role will be limited to attending volunteer meetings and speaking from the pulpit about the program. The Chair will help manage the volunteers during the active program as well as provide a Lay Witness during Mass and chair volunteer meetings.

Leadership recruitment is the top priority.

Pastors are encouraged to recruit a Chairperson who can help with the recruiting process. **This Chair should be identified prior to the summer.** The Pastor and the Chair will spend several weeks recruiting 5-15 Team Captains (depending on parish size) in time for the first meeting of the program, which will be the beginning of September or the beginning of October depending on the parish's Flight placement.

Recruiting an organized Program Secretary will also help reduce much of the workload during the program as he or she will take charge of the coordinating the printing, mailing and bulletin submission processes. Suggested recruiting scripts are included in this manual along with descriptions of the various leadership roles.

The final piece of the Leadership Team will be **the Team Captains.** This team will need to be recruited during Week 1 of the program. The Team Captains will then recruit and lead the Volunteer Advocates (1 Advocate per 20-30 Households) who will be the important link between the effort and every household in the parish.

Writing the Local Case for Support and Letters is the next priority.

This can take several weeks and will require **input from parish staff and the Finance Council.** Identifying the projected uses of the new revenues is essential as it is a question that is bound to arise from parishioners, and a compelling case for support will help encourage parishioners to increase their levels of support. Sample letters are provided and can be altered to whatever specifications the parish desires. The brochure will have space for two pictures. It is recommended that at least one of these photographs be of ministry or parish life. These pictures should be taken prior to the summer.

Segmenting the parishioner lists is the third priority.

This will take some time. Unfortunately, not all parish databases are created equal. For some parishes, this will be a one-step process and for others it may take weeks of data entry. Getting started early is the best way to ensure that the list is **ready by the 4th week of the program**, when it will be needed for the request mailing. Your Program Director is ready to help with this process, by guiding your staff through exporting the list and by handling the segmentation.

Careful segmentation of the lists to ensure appropriate request letters are mailed to all parishioners is essential to a successful effort. Request letters will be segmented into five levels of givers:

1. Non-Donor (inactive)
2. \$.01 -\$7.99 regular giving
3. \$8.00 - \$14.99 regular giving
4. \$15.00-\$24.99 regular giving
5. \$25 and above regular giving

Establishing an Electronic Giving program is the fourth priority.

This will take several weeks to set up and the *Sharing Our Blessings* Office is available to guide your staff through the entire process, including researching local banks or providing estimates from vendors.

The benefits of an electronic giving program are obvious: consistent giving over 52 weeks; a way for a parishioner to increase his or her own giving without increasing the amount they give each time; and an automated way for the parish to input donations directly into the database without data entry.

Banks are the recommended option if the parish likes having a local branch to stop into when needed and wants to go the most affordable route over the long run. Establishing an account with one of their branches is required, but usually they offer free accounts. Athol Savings and Unibank are the least expensive option of the banks researched thus far.

On-line vendors are the recommended option if ease-of-use is a high priority. Credit cards and bank account withdrawals are handled on the same program. Parishioners control their own donations on-line or they can call if they don't have internet access. Vendors will deposit the funds directly into the parish's existing account.

WHAT TO EXPECT – ACTIVE PROGRAM

Active Program:

Once recruitment, document production and list segmentation are complete, the process will in some ways slow down. The Program Director will still be in regular contact, but will only be in the parish on meeting days or on mailing days. The Pastor's role will switch from an active recruiter to a message deliverer and the Chair will take on more of a supervisory and cheerleader role. The expectations of each position during the public portion of the timetable (September or October onward) are outlined below:

Night Meetings:

The Pastor and Chair should expect to attend **three volunteer meetings** (typically at night) and have a role in explaining the program to the volunteers. The meetings will last less than one hour. The Pastor (or Associate / Deacon) will open and close the meetings with a prayer. The Pastor and Chair will help answer questions from volunteers. The Chair will guide the conversation, help explain the program to volunteers and lead the assignment process. The Program Director will help explain the program and will conduct the training of volunteers.

The first meeting will be for Team Captains (8-12 parishioners) and will last less than one hour. The second meeting will be for Advocates and Team Captains (1 volunteer for every 20-30 households) and will last approximately one hour. The third meeting will be a report meeting for the Advocates and Team Captains and will last approximately 45 minutes. The Program Director will provide all materials. The parish can provide refreshments if desired.

Weekly Bulletins:

The Program Secretary will be charged with submitting bulletin language to the Parish Secretary every week throughout the program. The Program Secretary will have all ten weeks of announcements prior to Week 1 and will be responsible for updating the statistics and seeking input from the Pastor and Chair prior to submission.

Pulpit Announcements:

The Celebrant, Chair or Lectors will have **announcements to make each week**. All will be very brief. The Program Secretary will be charged with submitting these announcements to the Parish Secretary or Liturgist every week. The Program Secretary will have all ten weeks of announcements prior to Week 1 and will be responsible for updating the statistics and seeking input from the Pastor and Chair prior to submission.

Preaching:

The Pastor and Chair will be asked to make one presentation each on behalf of the program. The Pastor's presentation will be in the form of a Homily dedicated to the principles of Stewardship. The Chair's presentation will be in the form of a Lay Witness to the act of increasing financial support to the parish. Examples from the Pilot Phase are provided in this manual.

Commitments:

Commitment Weekend is the time for parishioners to make their intentions known. Commitment Forms will be turned in early, but most will wait till this date. The process takes place during Mass and will last approximately eight minutes. Ushers or volunteers will be needed to distribute and collect Commitment Envelopes, and the Pastor will provide instructions from the pulpit on completing the forms. **Expect 35% – 45% of active parishioners to make decisions by this date.** Another 3%-5% will respond through the follow-up process.

Mailings:

There will be the equivalent of three mailings to the entire parish. The first will be an announcement mailing; the second will be the request mailing; and the third will be follow-up letters and thank you letters. Each letter will be personalized via the creation of mail merges directly from the parish list.

Ideally, all letters, brochures and envelopes will be printed during the summer and set aside until the actual mailing date. Volunteer folders, stuffers and stampers will be needed for all three mailings. **The parish should expect to budget \$2.50 - \$3.50 per household** for postage and printing costs.

1. Mailing #1 is a letter from the Pastor announcing the *Sharing Our Blessings*. This mailing includes a brochure that outlines the concept of stewardship giving explains how increasing giving will help meet the needs of the parish.
2. Mailing #2 includes a letter asking parishioners to consider a specific gift increase, as suggested by an enclosed gift plan card, and a commitment form (attached to the letter) on which each household indicates their increased giving intentions
3. Mailing # 3 will be sent to all non-respondents following Commitment Weekend. A reply envelope will be included in order to give parishioners a final opportunity to make their commitment.
4. Thank you letters will be sent from the pastor to all participants.

Post-Commitment Weekend:

Following a successful Commitment Weekend, there will be new information that a parish must immediately begin to analyze and record. Additionally, certain steps should be taken to ensure parishioners follow-through on their intentions to increase. A parish should also adopt a plan to conduct annual renewals of commitments in order to keep giving levels up and capture new commitments.

Data Entry:

Following Commitment Weekend, there will be much information available for the parish to update on each parishioner. **Email address, telephone, address and name changes** will be provided to the parish by parishioners. Parish staff and/or the Program Secretary should plan to spend several hours inputting the new information into the parish census program.

Offertory Tracking:

The Tracking Phase of the program begins **the weekend following Commitment Weekend**. This is the time where the actual results will be tallied and compared to the previous year's collections. It is anticipated that the actual percentage increase will be slightly different than the percentage increase suggested on the Commitment Forms (either higher or lower). This is because some parishioners will have made decisions to increase their giving without completing a Commitment Form, and because the Commitment Forms will be averaged into weekly equivalents – whereas parishioners may continue to give monthly, quarterly or even annually.

Weekly Bulletin Reports:

Following the conclusion of the program in the parish, **regular offertory reports should be provided in the bulletin**. These reports should include the amount given since the last report and a comparison to the previous year during that same timeframe. The reports should also include the year-to-date percentage increase over last year at the same time. These need not be weekly reports, though that is recommended, but the reports should be provided monthly at a minimum. This process will help the parishioners to understand how they are doing in comparison to the commitments they made. Parishes already providing weekly offertory totals in the bulletin should simply add the comparison figures to their regular report.

Annual Financial Reports:

Most parishes provide annual reports in the fall. These should be expanded slightly to offer a report on how the parish has done **in comparison to previous years** and in comparison the suggested increases that were offered on the Commitment Forms.

Redemption:

Because the intentions written on the **Commitment Forms are not pledges or legally binding documents**, there is no method for ensuring parishioners honor their commitments and the Program Office won't be able to provide an accurate projection on what to expect. A parish's Finance Committee should apply a discount (7% - 15%) to the commitments being made in order to account for natural attrition in the parish and unforeseen circumstances that will cause donors to reduce contributions. Future annual reports will help the Finance Council determine a more appropriate discount based on actual results.

Financial reports in the weekly bulletin and at year's end are the recommended methods for reminding parishioners of their commitments, and they are done parish-wide as opposed to individual reminders.

Renewal:

Annual renewals of commitments should be instituted in order to **reach new families and to offer parishioners the opportunity to increase their giving** if they are so inclined. The commitment process encourages families to be a part of the budgeting process. After several years, the Renewals will become a common practice and parishes will be able to apply the necessary discounts and accurately budget for the coming year based on the commitments being offered. It is recommended that Renewals take place in the fall in order to allow the parish to benefit from diocesan-wide publicity.

The Renewal program will involve mailing Commitment Forms to all parishioners, several weekends of announcements and a target date for receiving all Commitment Forms. A Continuation Manual containing a guide for conducting Renewals will be provided to the parishes upon completion of the *Sharing Our Blessings* program.

Program Timetable

SAMPLE PARISH TIMETABLES

Week #	Flight I	Flight II	Activities
Preliminary Activity	May – Aug.	May – Aug.	<ul style="list-style-type: none"> ▪ Planning Meetings with Pastor, Chair and Staff ▪ Regional Diocesan Kickoff Meetings ▪ Parish roster updating completed ▪ Chair and Secretary recruited ▪ Local parish Case Statement written ▪ Program letters written and finalized ▪ Segment parishioner giving list
Week #1	29-Aug	3-Oct	<ul style="list-style-type: none"> ▪ Leadership Team Meeting ▪ Team Captain recruitment initiated ▪ Initial Campaign Bulletin and Announcement #1
Week #2	5-Sep	10-Oct	<ul style="list-style-type: none"> ▪ Leadership Team Meeting or Team Captain Training ▪ Team Captain recruitment continued ▪ Bulletin/Pulpit announcements #2
Week #3	12-Sep	17-Oct	<ul style="list-style-type: none"> ▪ Team Captains Training Meeting ▪ Advocate recruitment initiated ▪ Announcement Letter is mailed with brochure ▪ Bulletin/Pulpit announcements #3
Week #4	19-Sep	24-Oct	<ul style="list-style-type: none"> ▪ Advocate recruitment continues ▪ Bulletin/Pulpit announcements #4
Week #5	26-Sep	31-Oct	<ul style="list-style-type: none"> ▪ Request Letter is mailed with commitment form ▪ Lay Witness Presentation ▪ Advocate Training meeting ▪ Pre-Commitment Weekend phone calls by Advocates ▪ Bulletin Write-up #5
Week #6	3-Oct	7-Nov	<ul style="list-style-type: none"> ▪ Stewardship Homily ▪ Pre-Commitment Weekend phone calls by Advocates ▪ Bulletin Write-up #6
Week #7	10-Oct	14-Nov	<ul style="list-style-type: none"> ▪ Commitment Weekend ▪ Advocate Follow-up Meeting ▪ Post-Commitment Weekend phone calls by Advocates ▪ Bulletin Write-up #7
Week #8	17-Oct	21-Nov	<ul style="list-style-type: none"> ▪ Tracking Week #1 ▪ Follow-up Commitment Weekend conducted ▪ Thank You Letters mailed ▪ Final local follow-up meeting ▪ Bulletin/Pulpit announcements #8
Week #9	24-Oct	28-Nov	<ul style="list-style-type: none"> ▪ Tracking Week #2 ▪ Thank You Letters mailed ▪ Non-Respondent Letters mailed ▪ Bulletin/Pulpit announcements
Week #10	31-Oct	5-Dec	<ul style="list-style-type: none"> ▪ Tracking Week #3 ▪ Thank You Letters mailed ▪ Bulletin/Pulpit announcements #9
Week #11	7-Nov	12-Dec	<ul style="list-style-type: none"> ▪ Tracking Week #4 ▪ Final Report & Renewal Guide Presented ▪ Bulletin announcements #10
Post-Program			<ul style="list-style-type: none"> ▪ Ongoing stewardship announcements and bulletin materials ▪ Annual Renewal of Commitments in Fall ▪ Frequent tracking and reporting

Leadership and Staff Roles

ROLES AND RESPONSIBILITIES OF PROGRAM LEADERSHIP AND ADVOCATES

Pastor / Parochial Vicars

1. Provide overall leadership for the Program.
2. Recruit General Chairperson and assist in the recruitment of Team Captains.
3. Review, revise, and approve materials to be mailed to all parishioners.
4. Attend and participate volunteer meetings and all events related to ***Sharing Our Blessings***.
5. Make pulpit announcements and speak positively to parishioners regarding the message of ***Sharing Our Blessings*** and its importance for the parish.

Program Chairperson

1. Supervise and be responsible for the recruitment of Team Captains.
2. Attend and participate in all volunteer meetings
3. Present pulpit announcements where appropriate.
4. Supervise the activity of Team Captains and recruitment of Advocates.
5. Communicate regularly with Team Captains and Advocates to encourage progress and share good news.
6. Make a personal commitment to ***Sharing Our Blessings***.

Program Secretary

1. Assist with preparation and segmentation of parishioner list.
2. Coordinate printing, assembly and delivery of all mailings.
3. Track responses and prepare individual thank you letters for each participating household.
4. Ensure prompt and accurate announcement submissions according to prescribed timetable.

Team Captains

1. Attend the Team Captains orientation and assignment meeting.
2. Recruit Advocates and report results to Chair.
3. Prior to the Advocates orientation and assignment meeting, call Advocates to remind them of the time and location of the meeting.
4. Attend Advocates orientation and assignment meeting.
5. Supervise and receive reports from Advocates making calls.
6. Attend Advocate Report Meeting and assist with follow-up assignment process.
7. Make a personal commitment to ***Sharing Our Blessings***.

Program Advocates

1. Attend the Advocates orientation and assignment meeting to receive an Advocate Kit for ***Sharing Our Blessings***, and receive training on calling fellow parishioners.
2. Receive an assignment of 20 to 30 households to call.
3. Make personal contacts to encourage commitments.
4. Attend Advocate Report Meeting and report telephone call results.
5. Follow up with households who have not returned their commitment forms.
6. Make a personal commitment to ***Sharing Our Blessings***.

ROLES AND RESPONSIBILITIES OF PARISH STAFF

Parish Secretaries, Business Managers and/or Bookkeepers

1. Report weekend offertory totals to Program Director each Monday.
2. Generate parishioner list for mailings during planning phase.
3. Receive bulletin articles from Program Secretary and submit for publication weekly.
4. Assist Program Secretary with coordination of mailings.
5. Upon completion of effort, update parishioner census information with data generated by commitment forms and phone calls.
6. Manage automatic payment process.

Leadership Recruitment Guide

SUGGESTED SCRIPT FOR RECRUITING LEADERSHIP AND TEAM CAPTAINS

Direct Contact:

1. *Hello, [first name], this is Father/Monsignor _____. [engage in social/personal conversation]*
2. *I am calling to ask for your help with something very important. As you may know, (Parish) is in the initial stages of **Sharing Our Blessings**, the Increased Offertory Initiative for the parishes of the Diocese of Worcester. This is a project which seeks enhance each parish's ability to grow and remain vibrant.*
3. *I'm not overstating it when I say that the program offers us a tremendous opportunity to make a positive change in our parishes for generations to come.*
4. *I want our parish to do well, and we certainly need the additional revenues, as I'm sure you are aware. When I consider the impact this initiative can have, it's clear that there's much at stake. That's why it is so crucial that we do this right, and to do it right, we need the help of our most influential parishioners; you're one of them.*
5. *To ensure the program is properly planned and implemented, we are assembling leadership team that will help me recruit parishioners to advocate on behalf of this project to every family in the parish. The time commitment is relatively small about three meetings over a six week period, beginning _____. I truly think your participation and guidance in this project are critical. May I count on you?*

[Note: It is most effective to wait for a reply before continuing.]

➤ **If the parishioner says "Yes"...**

Great! It will be a pleasure to work with you. Our first meeting will be on _____ in the _____. At that time we will go over the plan and undergo training on how to proceed.

➤ **If the parishioner says "Maybe"...**

Take some time to think and pray about it. Our first meeting is not until _____. I'll check back with you in a few days. Thank you.

➤ **If the parishioner says "No"...**

Thank you for considering it. Can you think of others who may be helpful that I can ask?

Voice Mail Message – Keep it Brief (about one minute):

Hello, this message is for _____. This is Father/Monsignor _____ at (Parish).

I'm calling to ask for your help on an important project going on in the parish.

I'll try you again on (Date and Time), but if you have a chance to call me before then, I can be reached at _____.

Thank you.

SUGGESTED SCRIPT FOR RECRUITING ADVOCATES

Direct Contact:

1. *Hello, this is _____, a fellow parishioner from (Parish). (Pastor) asked me to give you a call and ask for your help.*
2. *I'm calling about our parish's increased offertory initiative that has just begun.*
3. *We need a few men and women to volunteer during the program. This will entail attending an orientation meeting on (Day and time) and a few hours of work for everyone involved. You won't be asking anyone for money – just calling to remind people to return their commitment forms and encourage their participation.*
4. *We are very anxious to get as many advocates as possible so that there will be less work for everyone involved.*
5. *Will you give us a hand? (Pastor) and the entire committee will appreciate your assistance and I am the one who will be personally be most pleased to have you join us on the project.*

➤ **If the parishioner says “Yes”...**

Great! I am the Team Captain for Team # _____. You'll be working with me and at least _____ others. We'll meet on (Date) in the (Location). When you get to the meeting, please meet me at table #_____. I look forward to seeing you then.

In the meantime, do you have any questions about the initiative or what the parish is hoping to accomplish?

➤ **If the parishioner says “No”...**

Thank the parishioner for their time and express the wish that “they will be able to help later.” Remind them that the parish is conducting an increased offertory appeal and that you hope they'll think about their support of the parish – and, if possible, increase their regular contributions to the parish.

Voice Mail Message – Keep it Brief (about one minute):

Hello, this message is for _____. This is _____. I'm calling on behalf of (Pastor) at (Parish).

I'm calling to ask for your help on an important project going on in the parish.

I'll try you again on (Date and Time), but if you have a chance to call me before then, I can be reached at _____.

Thank you.

Program Policies

PROGRAM POLICIES AS APPROVED BY THE DIOCESAN STEERING COMMITTEE

Participation Policy

All parishes in the Diocese of Worcester will participate in *Sharing Our Blessings* either in the Pilot Phase (January 2010) or in the full rollout (Fall 2010). Exemptions will be given on a case by case basis by the Bishop and Steering Committee where extraordinary circumstances apply. Where exemptions are granted, the parish given the exemption will instead participate in the Renewal portion of the effort in the fall of 2010 using the plan set forth in the Continuation Manual.

Cost Sharing Policy

- Professional Fee Shared by Diocese and Parishes
 - 1/3 (\$261,738) Paid by Parishes
 - Proposed Fee Structure: Parish pays 1% of their FY2009 Cathedralricum (ended August 31, 2009)
 - 2/3 (\$523,947) Paid by Diocese of Worcester
- Mailing, Printing, EFT and Database Costs Absorbed by Parishes
 - Estimated at \$2 to \$3 per household
- Common Printing and Miscellaneous Expenses Absorbed by Diocese
 - Approximately \$46,000

Parish Invoicing Policy

An invoice for a total of 1% of the Parish's FY09 income as listed on the Cathedralricum tax report will be sent to the parishes two weeks prior to the beginning of their scheduled Flight according to the following schedule:

- Pilot Flight: December 21, 2009
- Flight 1: August 16, 2010
- Flight 2: September 13, 2010

The parishes will have two options for paying the invoice:

1. All at once in **Week 1** of the Flight
 - Pilot Flight: Due January 4, 2010
 - Flight 1: Due September 1, 2010
 - Flight 2: Due October 1, 2010
2. Three installments over the duration of the Flight: **Weeks 4, 8 and 12**
 - Pilot Flight: 40% February 1 / 30% March 1 / 30% March 29
 - Flight 1: 40% September 27 / 30% October 25 / 30% November 22
 - Flight 2: 40% November 1 / 30% November 29 / 30% December 27

Parish Goal Setting Policy

Parishes shall set their goals at a minimum of 25% of the parish's FY09 Offertory Income. In special circumstances where two or more parishes have merged since the end of FY09, a goal of less than 25% of the combined parishes FY09 offertories can be proposed to and approved by the Steering Committee. Goal reduction proposals must be submitted to the Steering Committee prior to July 31, 2010.

Policy on Sharing Parish Lists

Parishes are asked to produce a list of parishioners and their FY09 giving total, and provide the information to the *Sharing Our Blessings* office. The information contained in the list shall include:

1. Envelope #
2. ID #
3. Mailing Label Name
4. Salutation
5. First Name
6. Spouse First Name
7. Last Name
8. Spouse Last Name
9. Address 1
10. Address 2
11. City
12. State
13. Zip
14. Phone
15. FY09 Giving
16. # of FY09 Gifts
17. Weekly Giving Amount

The *Sharing Our Blessings* office will use this information to assist in segmenting the data and creating merged letters. The parishioner list and the information contained in it will not be used for any purpose other than for the *Sharing Our Blessings*.