WE ARE ONE

PASTORAL SERVICES APPEAL

ADVANCING THE MISSION OF THE DIOCESE OF ORANGE

2018 LEADERSHIP GUIDEBOOK
Pedro Para Los Servicios Pastorales

WWW.ORANGECATHOLICFOUNDATION.ORG
January, 2018

Dear Fellow Stewards,

As a Pastor, Administrator or PSA leader providing leadership for your parishioners, your commitment and dedication is inspiring. Your efforts are what make the impact possible through the many ministries and services provided through the PSA to all our parishes and centers and to the community at wide.

For 2018, we have a new theme, “We Are One”. This helps us remember that we are one family as the Diocese of Orange and we have been blessed with many gifts and find strength and beauty in our diversity. We celebrate our faith joyfully and make a sacrificial offering of our gifts in service to others.

This guidebook is being provided to assist you in implementing a successful campaign. It has been prepared to give you valuable information that will help you maximize your results to grow the engagement of your parishioners, support the ministries and services and help your parish earn valuable rebates that directly support your own important projects.

Inside you will find timelines, best practices and important information that you will need throughout the year. At any time during your planning or implementation of the PSA in your parish you have questions or could use consultation or assistance with any part of the campaign, please do not hesitate to contact me and we can make an appointment to meet one on one.

The Orange Catholic Foundation uses Blackbaud Raiser’s Edge for processing and tracking the PSA pledges and payments. Each parish has its own secure login and password and provides data entry of the initial pledges and ongoing payments or one-time gifts to the PSA. We are happy to provide training for anyone you have assigned at your parish for this important task. You will also want to be sure you can access your donor reports and other reports made available that will help you with your follow-up and reporting. Please contact Anna Orozco at aorozco@orangecatholicfoundation.org or (714) 282-3048 to set up personalized training for your parish.

You will be receiving a supply of pre-addressed envelopes for you to mail your batches of pledges and payments directly to the Farmer’s & Merchants lockbox. For additional supplies, please don’t hesitate to contact Anna Orozco.

Please know that I am grateful for your contributions and participation in the life of the Body of Christ here in our Diocese of Orange. I look forward to partnering with you as we work together in making the 2018 PSA a success!

Please contact me if I can be of any assistance at dleaverton@orangecatholicfoundation.org or (714) 282-3026.

With Gratitude,

Debra Leaverton
Director, Parish Stewardship Education and Pastoral Services Appeal
We Are One • 2018 Pastoral Services Appeal
Diocese of Orange
2018 Pastoral Services Appeal

Table of Contents

<table>
<thead>
<tr>
<th>Page #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter from PSA Director</td>
</tr>
<tr>
<td>OCF Staff Parish Support</td>
</tr>
<tr>
<td>About the PSA—New for 2018</td>
</tr>
<tr>
<td>Case Statement and List of Ministries</td>
</tr>
<tr>
<td>2018 PSA Funded Ministries and Services</td>
</tr>
<tr>
<td>2018 Parish Goals</td>
</tr>
<tr>
<td>Parish Goal Determination Formula</td>
</tr>
<tr>
<td>Parish PSA Incentive Program</td>
</tr>
<tr>
<td>Campaign Materials Overview-Important Dates</td>
</tr>
<tr>
<td>2018 PSA Video Suggestions for Use</td>
</tr>
<tr>
<td>Five Steps to a Successful PSA Campaign</td>
</tr>
<tr>
<td>Building a Business Case Worksheet</td>
</tr>
<tr>
<td>Setting Your PSA Goal Worksheet</td>
</tr>
<tr>
<td>Position Description for PSA Chairperson</td>
</tr>
<tr>
<td>PSA Timeline Template</td>
</tr>
<tr>
<td>Pastor’s Guide to a Successful PSA</td>
</tr>
</tbody>
</table>

Campaign Strategies

Standard PSA Campaign Overview | 18
Enhanced PSA Campaign Overview | 20
Principles for Success | 23
PSA Communication Tips:
  - Homily Hints/Prayers of the Faithful | 25
  - Bulletin Messages | 27
  - Bulletin Insert sample | 28
Outlines for Letters from the Pastor | 29
  - Sample appeal, thank you and LYBUNT letters | 30
PSA Speaker’s Bureau | 33
Lay Witness PSA Talks Guidelines | 34
Telephone Follow-Up Campaign Guidelines | 35
Fall Follow-Up Appeal Checklist | 38
End of Year Bulletin Messages (English/Spanish) | 39
Pledge and Batch Processing Tips/Ordering Batch Mat’ls | 40
Stock Gift Instructions | 41
Campaign Prayer | 43
### We Are One • 2018 Pastoral Services Appeal

**Orange Catholic Foundation**  
**Diocese of Orange**  
**2018 Pastoral Services Appeal**  
**Parish Support**

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Director and President, OCF</td>
<td>Cindy Bobruk</td>
<td><a href="mailto:cbobruk@OrangeCatholicFoundation.org">cbobruk@OrangeCatholicFoundation.org</a></td>
<td>(714) 282-3027</td>
</tr>
<tr>
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<td><a href="mailto:dleaverton@OrangeCatholicFoundation.org">dleaverton@OrangeCatholicFoundation.org</a></td>
<td>(714) 282-3026</td>
</tr>
<tr>
<td>Senior Funds Coordinator (Stock Gift Assistance)</td>
<td>Yolanda Wright</td>
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<td>(714) 282-3134</td>
</tr>
<tr>
<td>Donor Services Coordinator (English/Spanish)</td>
<td>Anna Orozco</td>
<td><a href="mailto:aorozco@OrangeCatholicFoundation.org">aorozco@OrangeCatholicFoundation.org</a></td>
<td>(714) 282-3048</td>
</tr>
<tr>
<td>Donor Services Coordinator (English/Korean)</td>
<td>Linda Ji</td>
<td><a href="mailto:lji@OrangeCatholicFoundation.org">lji@OrangeCatholicFoundation.org</a></td>
<td>(714) 282-3024</td>
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<tr>
<td>PSA Rebates/ACH Deposits</td>
<td>Andrew Hudson</td>
<td><a href="mailto:ahudson@OrangeCatholicFoundation.org">ahudson@OrangeCatholicFoundation.org</a></td>
<td>(714) 282-6002</td>
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<tr>
<td>Vice President of Operations</td>
<td>Brad Kimball</td>
<td><a href="mailto:bkimball@OrangeCatholicFoundation.org">bkimball@OrangeCatholicFoundation.org</a></td>
<td>(714) 282-3135</td>
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<tr>
<td>PSA FAX Number</td>
<td></td>
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<td>(714) 282-3136</td>
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*Donor support also offered in Vietnamese*
We Are One • 2018 Pastoral Services Appeal

ABOUT THE PSA

The Pastoral Services Appeal (PSA) is an annual 12-month campaign that runs from January 1 through December 31 each year that is conducted by the Orange Catholic Foundation (OCF) on behalf of the Diocese of Orange. The PSA funds selected vital ministries and services that benefit all 62 parishes and centers and the wider community in the Diocese of Orange. The programs and services designated as Bishop Vann’s priorities provide training, formation, education and outreach that REINFORCES the mission of each individual parish and reaches out to those in the wider community. The OCF grants the funds received three times a year to the designated ministries and services supported through the PSA.

Each parish conducts their own PSA campaign and has an assigned fair share goal. The PSA is based on policies that were updated in 2015 by a PSA Task Force of pastors and sent to all pastors and administrators by Bishop Vann in September 2015. The PSA Policies can be found on the Orange Catholic Foundation website under PSA/Parish Resources. The PSA provides an opportunity for parishes to earn significant capital funds to support important parish projects after their goal in payments is reached each year. 100% of all funds received over the parish’s assigned goal are returned to the parish as a monthly rebate, while all campaign marketing, processing and pledge redemption costs are covered for every parish and center by the OCF.

Accountability: Honoring the intent of the donor, the Orange Catholic Foundation insures that all gifts given are used ONLY for those programs and services recommended for support by a committee consisting of clergy and lay leaders and approved by Bishop Vann.

How it Works:
The Orange Catholic Foundation (OCF), on behalf of the Diocese of Orange:

- Provides leadership, training, marketing and parish support throughout the campaign year.
- Provides monthly updates and reporting to pastors, administrators and PSA leaders.
- Designs and provides promotional materials and an annual PSA video to support the appeal presented in each parish.
- Sends reminders to donors, according to the requested schedule, processes pledges and payments and provides status reports and rebates to parishes on a monthly basis during the year.
- Provides training for parish leaders to submit pledges via secure online site.

Parishes:
- Presents the appeal to parishioners using the materials provided to invite the participation of as many parishioner families as possible through a comprehensive campaign timeline and strategy.
- Parishes submit batches of pledges on a secure website protected by unique passwords for processing and mails the pledge envelopes and a check covering the batch entered to a secure lockbox operated by Farmer’s & Merchants Bank. Security envelopes and mailing boxes are provided to the parishes for this purpose.
- The OCF provides a secure online electronic giving site for all credit card and ACH gifts (www.orangecatholicfoundation.org) that is donor driven and insures all gifts are applied to the donor’s intended parish.

New for 2018 PSA:
- **2018 Theme—“We Are One”**
- **Parish Incentive Program** — The 2018 PSA Parish Incentive Program is outlined on Page 9.
- PSA brochures in four languages are offered along with posters and banners in four languages. Material order forms were sent out in October 2018.
- **New 3.5 minute Video** created to inspire your parishioners to support the PSA and your parish. It is available in English, Spanish and Vietnamese (see instructions on Pg. 11).
The Pastoral Services Appeal is the main source of support for selected programs and services which serve parishes, the wider community and the local Church of Orange. It also provides parishes with the opportunity to earn significant funds to support vital parish projects. Following is a description of the programs and services supported through the PSA.

**Parish Rebates**
Each year, approximately 35% of the total PSA campaign funds raised go back to the parishes for their own important projects that support the mission of parish life. 100% of every gift raised over each parish’s assigned goal is returned to the parish for its own stated project(s).

**Catholic Education and Faith Formation**

- **Grants for Lay Ministry Formation and LMU Extension** - Provides grants for lay ministry formation including basic and advanced Religious Ed Catechist certification, Diaconate formation, Catholic school teacher and lay leader continuing education and assists clergy, religious and lay leaders with grants for the LMU extension master’s program for Pastoral Theology.
- **Catholic Schools Tuition Assistance** - Provides grants to Catholic elementary schools for tuition assistance for families in need.
- **Parish Stewardship Education** - Provides consultation, education, and resources to help parishes and schools promote the stewardship way of life thereby helping to build parishioner engagement and sustain ministries and financial resources throughout the diocese.

**Outreach Ministries**

- **Catholic Charities of Orange County** - Uses fiscal and human resources to strengthen families, reduce poverty, and build communities, especially for those whose basic needs are most neglected. At Bishop Vann’s request, each year ten percent of all PSA allocations are committed to Catholic Charities of Orange County.
- **Catholic Deaf Community** - Provides a faith community whereby Catholic Deaf adults and children are drawn in communion and ministry as full participants in the local Church of Orange.
- **Catholic Restorative Justice and Detention Ministry** - Through almost 300 volunteers, ministers to adults and juveniles in four languages by providing pastoral care, Bible study and sacraments to inmates of eleven city, county and federal jails in Orange County each year. This ministry also works to restore relationships broken by crime, including victims, families, the local community and offender.

**Clergy Formation and Support**

- **Deacon Formation and Support** - Provides a four year program of discernment, education and spiritual formation for men preparing for ordination to the diaconate (deacons) and their wives, as well as continuing education and formation for those deacons already ordained.
- **Seminarian Education** – Provides education for men studying to become priests including seminarian tuition, room and board.
- **Priest Continuing Education** - Provides for post-graduate education for priests, advanced degrees and sabbaticals.
- **Vocations** - Discovering vocations to the priesthood, helping young men in the discernment process and supervising their education and spiritual formation as they prepare for ordination.

**Orange Catholic Foundation**

- **Parish and Diocesan Development** - Provides a safe harbor for philanthropic gifts through endowments, major gift programs, the Pastoral Services Appeal, the diocesan capital campaign, planned giving and other important advancement efforts while nurturing a spirit of generosity through stewardship formation and education.
## EDUCATION

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<td>Grants for Lay Ministry Formation</td>
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<td>Additional Formation Scholarships Parish/School Staffs and Lay Leadership</td>
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<td>Catholic Schools Tuition Assistance</td>
<td>1,141,350</td>
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<td>Parish Stewardship Education (OCF)</td>
<td>156,559</td>
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## OUTREACH MINISTRIES

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<td>Catholic Charities (10% of total allocations)</td>
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<td>Catholic Deaf Community</td>
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<td>Catholic Restorative Justice and Detention Ministry</td>
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## CLERGY FORMATION & SUPPORT

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<td>Diaconate Formation and Support</td>
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<td>Clergy Continuing Education</td>
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<td>Seminarian Education</td>
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<td>Vocations</td>
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## ORANGE CATHOLIC FOUNDATION

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<td>Parish and Diocesan Development</td>
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<tr>
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<table>
<thead>
<tr>
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<td>Parish Contingency Fund (in the event parishes without reserves don't meet goal)</td>
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<td>PSA Parish Incentives and Parish Contingency Fund</td>
<td>50,000</td>
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<td>PSA Administrative Costs (8.5% of total PSA campaign)</td>
<td>874,726</td>
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<tr>
<td><strong>Total</strong></td>
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## Total Program Funding

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<td><strong>Total Program Funding</strong></td>
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<tr>
<td>Parish</td>
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<td>--------------------------------</td>
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<tr>
<td>Blessed Sacrament</td>
<td>$117,000</td>
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<td>Catholic Deaf Community</td>
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<td>Christ Cathedral</td>
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<td>Christ Our Savior</td>
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<tr>
<td>Corpus Christi</td>
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<tr>
<td>Holy Family Cathedral</td>
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<td>Holy Family, S.B.</td>
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<td>Holy Spirit</td>
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<td>Holy Trinity</td>
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<td>Immaculate Heart of Mary</td>
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<tr>
<td>Pope John Paul II Polish Center</td>
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<td>Korean Martyrs Center</td>
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<td>La Purisima</td>
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<td>Mission Basilica San Juan Cap.</td>
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<td>Our Lady of Fatima</td>
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<td>Our Lady of La Vang</td>
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<td>Our Lady of Peace</td>
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<td>Our Lady of Mount Carmel</td>
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<td>Our Lady of the Pillar</td>
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<td>Our Lady Queen Angels</td>
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<tr>
<td>Ss. Simon &amp; Jude</td>
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<tr>
<td>San Antonio de Padua</td>
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<tr>
<td>San Francisco Solano</td>
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<td>Santa Clara de Asis</td>
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<td>Santiago de Compostela</td>
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<td>St. Barbara</td>
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<tr>
<td>St. Bonaventure</td>
<td>$162,000</td>
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<tr>
<td>St. Boniface</td>
<td>$146,000</td>
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<tr>
<td>St. Catherine of Siena</td>
<td>$75,000</td>
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<tr>
<td>St. Cecilia</td>
<td>$130,000</td>
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<tr>
<td>St. Columban</td>
<td>$158,000</td>
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<tr>
<td>St. Edward the Confessor</td>
<td>$245,000</td>
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<tr>
<td>St. Elizabeth Ann Seton</td>
<td>$79,000</td>
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<td>St. Hedwig</td>
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<tr>
<td>St. Irenaeus</td>
<td>$192,000</td>
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<tr>
<td>St. Joachim</td>
<td>$83,000</td>
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<tr>
<td>St. John Neumann</td>
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<td>St. John the Baptist</td>
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<td>St. John Vianney Chapel</td>
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<td>St. Joseph, Placentia</td>
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<td>St. Mary’s By Sea</td>
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<td>St. Pius V</td>
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<td>St. Polycarp</td>
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<tr>
<td>St. Thomas Korean Center</td>
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<td>St. Thomas More</td>
<td>$130,000</td>
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<tr>
<td>St. Timothy</td>
<td>$144,000</td>
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<tr>
<td>St. Vincent de Paul</td>
<td>$130,000</td>
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PSA Parish Goal Determination

Parish PSA goals are set based on an equitable distribution of the amount needed to fund ministries and services that serve all parishes and the wider community. The ability of a parish to generate revenue, demonstrated by its current history of ordinary income, is the primary determinant of a parish’s PSA goal. Following is a description of the goal setting process.

1. The Bishop establishes the level of PSA revenues needed to fund programs and services for the coming fiscal year (the PSA Allocations).

2. A Review Committee consisting of the Vicar General, OCF Executive Director and PSA Director then apportion that goal to parishes and centers as equitably as possible using a combination of objective and empirical criteria.

   a) Objective sample calculation of goal

   Example:

   Individual Parish Ordinary Income 3 Year Average $862,627
   +
   Ordinary Income 3 Year Average for all Parishes $64,977,339
   =
   Parish % Share of Total Ordinary Income 1.33%

   Parish % Share 1.33% x
   Diocese PSA Allocations $5,821,000
   =
   Calculated Parish Goal $77,177
   Rounded Parish Goal $77,000

Minor adjustments may be made on a case-by-case basis using specific parish circumstances.
We Are One • 2018 Pastoral Services Appeal

2018 PASTORAL SERVICES APPEAL
PARISH INCENTIVE PROGRAM
Award Event at 2018 PSA Kickoff!

Purpose
- To encourage more of the faithful to participate in the mission of the local Church of Orange, educating them about the ministries supported through the PSA and recognizing parishes showing exemplary efforts
- To significantly increase participation in the PSA counting increase in new donors for the 2018 PSA year.

Plan A – Increase in # of Donors
Benchmark year of 2017 will be used to track increased number of donors.
(Benchmarks will be provided in January 2018.)

<table>
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<tr>
<th>Over Benchmark</th>
<th>Award Levels</th>
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<tr>
<td>30% increase</td>
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<tr>
<td>20% increase</td>
<td>$2,500</td>
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<td>10% increase</td>
<td>$1,000</td>
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Plan B—Most Creative PSA Promotion—If your parish uses a creative PSA promotion involving the Pastor or Administrator over and above the steps suggested in the guidebook, to enhance your PSA, your parish can be entered to win an additional incentive award in the amount of $2,000 (to be awarded to one parish).

In order to be eligible for the Most Creative PSA Award, the parish must have reached one of the above benchmarks in increasing donors for the 2018 PSA by September 30, 2017.

A form will be posted on the OCF website under PSA/Parish Resources in January 2018 for you to submit your creative promotion. Be sure to capture your promotion on video and/or pictures to be submitted. The PSA Promotion Award submittals will be due no later than September 30, 2018 (or any time before then).

This award will be selected by vote and awarded at the 2019 PSA Kickoff Event. The winning parish/center will be asked to present their promotion at the event.

Awards earned through the incentive program are in addition to any rebate earned over your parish goal. All incentive awards will be distributed at the 2019 PSA Kickoff Event.

2018 PSA Incentive Awards are subject to maximum level of total incentive awards of $50,000.
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CAMPAIGN MATERIALS OVERVIEW

Marketing

- Brochures:
  - Diocesan Brochures—4 versions: English, Spanish, Vietnamese and Korean

- PSA 3.5-minute Video—English, Spanish and Vietnamese

- Pledge Envelopes— with internal tear-off flap. Use for in-pew solicitation or mailing. The envelopes allow for mailing back to the parish (Eng/Spanish, Eng/VN and Eng/Korean)

- PSA Parish Leadership Guidebook (English/Spanish): Use for PSA Committee campaign planning

- Posters— (English, Spanish, Vietnamese and Korean)

- Banners—3’ X 4’ - ONE FREE FOR EACH PARISH (English, Spanish, Vietnamese and Korean)

- Thermometer Charts— (English/Spanish) New design for 2018 PSA. Post in visible area and update progress to keep parishioners informed. Artwork available if parish wants to print own larger thermometer banner.

- Bulletin Ad— (English/Spanish) Download on the website under PSA/Parish Resources

The campaign logo and other PSA resources are available at www.OrangeCatholicFoundation.org under PSA Parish Resources for download

2018 PSA IMPORTANT DATES

- 12/1/17 OCF/Diocece PSA Kickoff Event/Luncheon
- 1/6-7/18 First Parish PSA Kickoff Date
- 1/2/18 Raiser’s Edge Batch Entry Site Open for Parish Batch Entry
- 2/14/18 Ash Wednesday (try to kickoff before this date)
- 4/01/18 Easter Sunday
- 11/30/18 2018 Parish Incentive Awards at 2019 PSA Kickoff
- 1/31/19 2018 PSA Tax Receipts Mailed
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2018 PSA 3.5 Minute Video

SUGGESTIONS FOR USE

Video links will be provided in each language version to be downloaded to a device for playing

Purpose:
1. To assist Pastors in promoting the Pastoral Services Appeal.
2. To educate parishioners about the good work made possible by ministries and services supported through the Pastoral Services Appeal and unified work of parishes throughout the Diocese.
3. To provide another means of communication. People respond to visual images which are usually much more powerful than the written or spoken word.

Suggestions for Use:
- Show at liturgy during time of pastor appeal from the pulpit (see suggestions at bottom of page).
- Show in vestibule of parish as parishioners are arriving for Mass.
- Show in Hall or Parish Center after Mass, invite parishioners to stop in to view (provide hospitality for those attending).
- Publish link on parish website along with a button linking to the OCF PSA online giving page.
- Show to Finance Council, Parish Pastoral Council, Staff and other key meetings.
- Encourage ministry leaders to show it at their group meetings.
- Show at PSA Leadership Events.

Suggestions for Renting AV equipment needed to show to large groups:
Rental equipment is available for reasonable rates. (under $300 per weekend). Delivery is free – deliver on Friday, pick-up on Monday.

Referral:
Source One Rentals
(714) 429-0155
Contact: Keith Mason
Will give group discounts if many parishes rent Equipment within a few week period.

Technology Grant Applications available through OCF for parish AV equipment. Contact Brad Kimball (714) 282-3135 or bkimball@orangecatholicfoundation.org
Five Steps to a Successful PSA Campaign

1. Develop a Business Case and Set a Financial Goal
   “people need a vision of where they are going”

2. Recruit a Chairman and Committee
   “you need someone to lead the charge and workers to lighten the load”

3. Set a Timeline for the entire year campaign
   “a roadmap will keep you on task”

4. Market Your Campaign
   “people need to see and hear about it multiple times before you get their attention”

5. Pastors are the Key to Success
   “Make Your Pastor Shine by assisting with drafting talking points, letters, etc.”
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2018 PSA
Building a Case

What is the Vision of your Pastor and Church Leadership?
Where do they want to “go”?

Is the Vision Stewardship based? Spiritually fulfilling?
Is it clear?
Is it meaningful to the parishioners?
Will it bring parishioners closer to the church community?
Include support of the Bishop & Diocese?
Are they achievable? Clear?

This year, what are the goals (steps toward) to achieve the Vision?

Impact Statement: How does your business case take steps toward realizing the goal toward the vision?

Write your Impact Statement above (Business Case) – to be shared with the parishioners.
Is the Impact Statement expressed in ministry terms? (Rather than: PSA rebates will go toward re-surfacing our parking lot—Try: With funds earned through the PSA, we will be able to resurface our parking lot to provide a more welcoming and safe environment for our parishioners to more fully participate in their faith and our parish.”
Does it touch people’s hearts? Does the Impact Statement express the difference it will make?
“So what?”. “Who cares?”.

Vision – Goals – Impact statements

Permeate all materials, lay witnesses, bulletin announcements, greeting of parishioners...
enthusiasm is contagious – leadership starts the epidemic!
2018 PSA
Setting Your Goal

Goal for participation: Look back over past 2-3 years – where have we been (what is possible) and where do we want to be? Use average mass attendance (total mass count divided by 3 (avg family) = number of families that regularly attend. (ex: 2400 / 3 = 800). Set goal from there: 400 = 50%, or higher – reach out to those who do not attend on a regular basis (mail/website/other).

Create a stretch goal that is challenging, yet attainable (to allow excitement and the possibility for success):

Our 2018 goal for participation (# of pledges):

_____________________

Financial goal: Based on our parish PSA goal, set a challenging financial goal (perhaps 2 to 2 ½ times your diocesan PSA goal – more for parishes with highly motivated parishioners – ex: building a church). Consider your redemption of pledges – average is 90% redemption of $’s pledged.

Our financial goal for 2018:

$_____________________

Post both the goal for participation and the financial goal on your thermometer chart and continue to update your progress on the chart to be posted in a visible place for all parishioners to see. You may also post a copy of the thermometer chart in your parish bulletin.

Be Bold – Dream!

“...enthusiasm is contagious – leadership starts the epidemic!!”
We Are One • 2018 Pastoral Services Appeal

POSITION DESCRIPTION
PARISH PASTORAL SERVICES APPEAL
CHAIRPERSON

**Desired Skills:**
Commitment to parish and understanding of diocesan mission, good communicator, good leadership skills, good project management skills, good follow-up skills, good understanding of marketing strategies.

**Role:**
The parish PSA Chairperson has the important role of communicating to the parishioners that they are all an integral part of the Pastoral Services Appeal mission. It is important that this person expresses their own commitment as well as financial support of the appeal.

The chairman is the link between the appeal and the people of the parish. Together with the pastor, their responsibility is to see that the overall appeal plan is appropriate for the parish and that the steps of the plan are carried out within the time frame established for the annual Pastoral Services Appeal.

As chairperson, they must ensure that volunteers meet and thoroughly understand the campaign plan and have a clear understanding of their assignments.

**List of Job Duties:**
- Recruits committee of 6-8 people
- Attends PSA Kickoff Event on 11/30/18 at 12:00 p.m.
- Organizes the structure of the parish PSA campaign.
- Supervises every phase of the parish appeal campaign under the guidance of the pastor.
- Holds monthly meetings of the PSA leadership committee to review progress and determine next steps.
- Assists pastor with determining parish case and keeps it visible for the entire campaign.
- Assists pastor with determining parish goal for campaign (usually 2 - 2-1/2 X diocesan goal)
- Enlists as many volunteer workers as necessary to effectively carry out the primary solicitation and follow-up efforts.
- Assists pastor with identifying lay witness speakers and insures they are trained and rehearsed before presenting talk.
- Familiarizes themself with all PSA printed materials, especially the list of ministries and services funded by the PSA.
- Oversees the distribution of all operative materials necessary for the recruitment and training of all volunteers.
- Coordinates the follow-up phase in the parish through either personal contact, telephone contact or direct mail.
- Supports the PSA by making their own personal pledge. Motivates and guides volunteers in considering their own financial commitments to the annual appeal.
- Recognizes the time, talent and treasure of volunteer workers and PSA donors.
- Ensures ongoing communication plan is carried out (bulletin inserts, flyers, follow-up appeals, donor recognition, etc.)
# 2018 Pastoral Services Appeal Timeline

Parish Campaigns Run from January—December 31, 2018

(Fill in your own parish detailed timeline)

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>October</td>
<td>Select PSA Chair</td>
<td>Pastor makes personal invitation to an individual or couple to serve as the PSA Chair</td>
</tr>
<tr>
<td>October/November</td>
<td>Order PSA Materials</td>
<td>Return PSA Material Order Form and Leadership Form to OCF by specified date (remember to order enough for subsequent mailings and in-pew follow-up appeals)</td>
</tr>
<tr>
<td>October/November</td>
<td>Setting Timeline and Strategy</td>
<td>Hold meetings to establish PSA Committee and create timeline for entire campaign. Conduct training for volunteers</td>
</tr>
<tr>
<td>October/November</td>
<td>Determine Case for Support and Goal for Campaign</td>
<td>Determine and write business case for support for 2017 PSA ministry terms. Choose a challenging, yet realistic goal over the assigned parish goal for your campaign</td>
</tr>
<tr>
<td>November</td>
<td>Establish Kickoff Date on Parish Calendar</td>
<td>Choose at minimum a 2-week period prior to Ash Wednesday for the Announcement Weekend and the Pledge Weekend where no other competing events are conflicting</td>
</tr>
<tr>
<td>November</td>
<td>Regional Training Sessions</td>
<td>Entire PSA Team attend PSA Regional Training. Learn new theme and components for the new year PSA</td>
</tr>
<tr>
<td>November</td>
<td>Plan Leadership Event</td>
<td>If you are conducting a leadership event, make a plan for the date, specifics, invitations, etc.</td>
</tr>
<tr>
<td>November 30</td>
<td>Diocesan PSA Kickoff Luncheon Event</td>
<td>Invite entire PSA team to attend PSA Kickoff Luncheon</td>
</tr>
<tr>
<td></td>
<td>Mailing to all Registered Families</td>
<td>Draft letter for your Pastor that invites participation in the PSA using Stewardship language. Send with PSA brochure and pledge envelope</td>
</tr>
<tr>
<td>Weekend 1</td>
<td>Announcement Weekend</td>
<td>Lay Witness speakers are scheduled for all Masses (or can schedule the week after Commitment Weekend, whichever works best for your parish</td>
</tr>
<tr>
<td>Weekend 2</td>
<td>Pledge Weekend</td>
<td>Use PSA Video to lead in to Pastor’s PSA pledge homily. Pastor speaks at all Masses explaining the PSA and presenting the parish business case and ask for pledge</td>
</tr>
<tr>
<td>Weekends 3/4</td>
<td>Follow-Up Weekend</td>
<td>Pulpit announcements thanking everyone for participation - giving # of pledges/&quot;S&quot;s pledged, bulletin announcements, update thermometer chart and post in visible area, stock PSA brochures and envelopes in Church vestibule</td>
</tr>
<tr>
<td>Weeks 3&amp;4 of Campaign</td>
<td>Thank You Letters</td>
<td>Send thank you letters to all who have made a PSA pledge (within 2 weeks) Follow-up Letters to those who haven’t yet pledged (use Donor and LYBNT reports from OCF). Consider publishing participant names in the bulletin (alphabetically, no $ amounts)</td>
</tr>
<tr>
<td>Late Spring</td>
<td>Telephone Follow-Up</td>
<td>Convene a telephone committee that will meet together to make follow-up calls to those who have not pledged and to offer pastoral support</td>
</tr>
<tr>
<td>Early Fall</td>
<td>Follow-Up Appeal</td>
<td>Pastor appeals to all who have not made a PSA pledge whose situation may have changed or those who may consider increasing their original pledge</td>
</tr>
<tr>
<td>Late Fall</td>
<td>Celebration</td>
<td>Parish plans thank you event for all PSA donors (could include all parishioners thanking them for year-long support). Reception and/or dinner thanking all for their participation. Plan a celebration weekend at the parish with bulletin article and pulpit announcement thank you’s. Reminders to all to continue redeeming pledges through end of December.</td>
</tr>
</tbody>
</table>
OBJECTIVES OF THE ANNUAL PASTORAL SERVICES APPEAL

1. To educate Catholics about the importance of being a member of the local Church of Orange and to give them the opportunity to participate in the mission of the local church through the spirituality of stewardship.
2. To collect donations in the amount of the diocesan allocations to fund specified pastoral services.
3. To utilize the parish rebates to fund building projects, local ministries and charity outreach and encourage participation in the mission of the parish.

TIP: If you stress reason number one, your parishioners will be forming a life-long giving habit. By combining the emphasis on both the diocesan case and your parish case, you will experience more success.

THE PASTOR’S ROLE

“People give to people - not causes”. This truism explains why THE APPEAL MADE BY THE PASTOR IS THE SINGLE GREATEST INFLUENCE ON THE SUCCESS OF THE PSA. Both the “appeal” he makes in his letter and homilies, and his leadership and relationship with the parish community impact the participatory and financial success of the PSA.

DO . . .

... explain how supporting the mission of diocesan church as well as the parish church is part of our responsibility as disciples.
... stress the need we have to share with others what God has entrusted to our care.
... set an example by making your pledge first.
... ask for a “proportionate” gift – equal sacrifice, not equal gifts. Explain the gift chart on the PSA Pledge Envelope, and ask people to pledge a percent of income, or their pay for “x” hours per month, or an amount equal to a non-essential in their life.
... encourage donors to pay their pledge over 10 months to develop the habit of giving and to reinforce their connection to the local church.
... ask people for “equal sacrifice, not equal gifts”. Why talk about the “minimum” to give to God!

DO NOT . . .

... ask for a specific gift amount. It will be impossible for some parishioners to fill their pledge (poor redemption and guilt results) and will limit those who could make a much larger gift (equal sacrifice, not equal gifts)
... ask people to make a pledge just so the parish can do complete its stated need, barely mentioning the diocesan case for support.
... stress giving to fill church needs.
... “Do as I say, not as I do.”
... ask parishioners to put their total gift in the envelope so they can forget about it until next year—both apathy and smaller gifts result.
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Campaign Strategy #1

STANDARD PSA CAMPAIGN OVERVIEW

Use Strategy #1 or #2, not both
(See Pg. 19 for Enhanced PSA Overview for Raising Capital Funds)

1) Attends PSA Annual Training Workshop
2) Attends annual PSA Kickoff Event

Stage I - Preparation

- **Recruit chairperson** and others to serve on the PSA Committee (see job description on pg. 15) to create strategy, prepare mailings, process pledges and payments, staff tables after Masses, and make phone calls.
- **Determine parish business case** (use) for a rebate and keep it a priority for the entire year. The parish case for support should be well thought out, serving the mission of the parish and expressed in ministry terms how it will effect parish life, (either provide space for ministry/a more prayerful environment/more welcoming, better safety, etc.)
- **Set a goal** for number of pledges and dollars to raise (make it a challenge to reach).
- **Send a personalized cover letter** along with a PSA brochure to all parishioners one week before PSA Weekend to explain how the Diocesan programs and services will be supported as well as your own parish project. You may also want to include a pledge envelope at this time to be returned at Mass.
- **Weekend before PSA Campaign:**
  - Hang PSA Banners, mount posters and thermometer chart with goals indicated prominently.
  - Place Brochures in pews for Masses in appropriate languages
  - Prayer of Faithful at all Masses (See page 25)
  - Announcement in Bulletin - "PSA Pledge Weekend coming" (See page 27)
  - Pulpit Announcement - "Come prepared to make your PSA pledge next weekend."

Stage II - PSA Pledge Campaign

PSA Announcement Weekend (Week 1):

- **Lay parish speaker or speaker from Speaker Bureau** speaks at all Masses, sharing their faith journey and explaining why he or she supports the PSA. The Ministry Speaker from the Speaker Bureau would give a face to the ministry and explain the impact gifts to the PSA have on lives (see pages 33 & 34).

PSA Pledge Weekend (Week 2):

- **PSA Video is shown at all Masses**
  Place extra PSA brochures and pledge envelopes in pews in the language of each Mass.

- **The Pastor speaks at all Masses** explaining the PSA in terms of participation in the local church and presenting the parish business case. The emphasis of the homily is the spirituality of giving – sharing what God has entrusted to our care to carry out his will.

  The pastor asks parishioners to reflect during the coming week on God’s goodness in their lives, to discuss with their family the sacrifice they could make to help others, and to pray about a proportionate and grateful gift amount in preparation for making a PSA pledge the next weekend (homily hints page 25)

- The pastor leads people through filling out the pledge envelope and explains the proportionate giving chart on the pledge envelope. Pledge envelopes are then collected during the regular collection.

- A general rule of thumb for charitable giving is 5% to the parish, 1% to the diocesan annual appeal and 4% to other charities

Both Weekends:

- Table after all Masses with volunteers to answer questions about the PSA.
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STANDARD PSA CAMPAIGN OVERVIEW (Continued)

PSA Follow-up Weekends (Weeks 3 and 4):
• Pulpit announcements giving results, thanking donors, asking others to participate and to
  prayerfully consider the amount of their pledge and announcing that people are at tables
  after Masses to answer questions.
• Update thermometer chart with new numbers each week.
  Make similar report and announcements in the parish bulletin (consider publishing donor
  names in the bulletin—except for those requesting anonymity).
• Provide PSA brochures and pledge envelopes in the pews.
• Staff a table after Masses with PSA committee members familiar with the PSA to
  answer questions, handout brochures and envelopes and accept pledges.

Stage III - Follow Up
Minimum Effort
• PSA Secretary and volunteers process pledges weekly online at the Blackbaud hosted site
  using the parish secure login. All pledges and payments are sent to the PSA lockbox using the
  security envelopes provided by OCF. (Please do not mail cash—all cash should be deposited to
  the parish bank account and a check cut and included in security envelope).
• Send a personalized thank you letter from the pastor to everyone who made a pledge.
• PSA Secretary or volunteer reviews the monthly PSA reports available online to verify correct
  recording of pledges and down payments.
• Report PSA results in the parish bulletin and on the thermometer chart each week during the
  campaign, and monthly during the rest of the year.
  • Pulpit Announcements, Bulletin Announcements and volunteers at tables after all Masses during
    the four week active phase of the campaign.
  • Send a follow-up letter from the pastor to everyone who did not make a pledge, with a
    PSA Pledge Envelope to return to the office or put in the Sunday offertory basket.
    (Use the online PSA LYBNT or Donor report to determine who has made a pledge.)
• Contact people who pledged but are not registered to fully register and welcome them.
• Ask new parishioners to make a PSA pledge as part of the parish registration process.

Better Effort and Better Response (All of the above plus . . .)
• Make a follow-up phone call to those who made a pledge last year but have not yet
  pledged this year. (LYBUNT report available online). Send a follow-up letter to all other parish
  households not making a pledge.
• Send second follow-up letters in late spring to those who have not yet made a pledge.
  Consider a customized letter to parishioners who pledged in 2016, but did not renew their pledge
  in 2017. Another group worth additional personalized contacts are
  parishioners who use Sunday Envelopes but did not make a PSA pledge.

Best Approach and Best Results (All of the above plus . . .)
• Follow-Up Phone Calls are even more effective than letters to follow-up with parishioners who
  have not pledged. This is also an opportunity for a pastoral contact to update parish
  information about the family and to learn about any special needs.
  • Send reminder letters, phone calls or bulletin announcements to remind parishioners
    to complete their pledge.
  • Conduct a follow-up appeal in the Fall for those whose circumstances may have
    changed or some donors will increase their original appeal.
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Campaign Strategy #2

ENHANCED PSA CAMPAIGN OVERVIEW (pgs. 19-21)
(Use these guidelines to use the PSA to generate substantial capital funds for your parish case)

1) Attends PSA Annual Training
2) Attends the Annual PSA Kickoff Event

PHASE I – Preparation (late summer/early fall)

- The pastor recruits a chairperson to help him conduct the diocesan Pastoral Services Appeal campaign (see leadership job description on Pg. 15), with an emphasis on gaining significant support for the parish’s capital project. A sample structure is outlined below. The pastor, together with leadership, should establish both financial and participatory goals

- Set a goal for participation. While 100% is the ideal level, it is not realistic. Consider a goal such as two times the number of families that made a pledge last year. Principle #1 for fund raising remains: “Get people to participate and the dollars will take care of themselves.”

- Establish a financial goal for PSA pledges which includes the parish share of diocesan pastoral services (designated parish goal) and parish project and is challenging. Think in terms of at least the parish annual offertory income, or more if you have parishioners with the capacity to make very large gifts – if motivated and engaged! At the same time, make the goal attainable so your parishioners will have a sense of success and will see tangible results from their sacrifices by the end of the year. If necessary, large projects should be implemented in phases to realistically match the capability of the parish to finance its plan.

- Determine the parish case for support. The case should be well thought out and meaningful to the mission of the parish. The message needs to be well-communicated and kept front and center.

Typical Campaign Organization:

- **Parish Staff** has a role, including:
  - Making sure the parishioner roster/mailing list is current.
  - Recording confidential data from committees to segment lists for special mailings, invitations and phone calls, as well as posting PSA pledge amounts.
  - Preparing mailings with volunteer assistance.
  - Making sure PSA information provided gets into bulletins, etc.

- **Leadership Gifts Committee**
  (Small peer group maintains confidentiality)
  - Identify prospects for Leadership Gifts: those with the largest gift potential and proclivity to give. They may have made special gifts to the parish in the past (school, year-end, earlier campaign), or peers may know of charitable gifts they made to other causes or recent personal or business financial windfalls. These prospects may or may not make significant regular parish offertory gifts.
  - Advise the pastor on the appropriate approach to solicit a leadership gift from each prospect.
  - Assist the pastor in implementing the Leadership Gift phase of the PSA campaign.

- **Advance Gifts Committee**
  - Identify prospects for Advance Gifts – parishioners not identified as Leadership Gift prospects who supported the PSA or other parish campaigns in previous years. (The OCF can provide lists of prior PSA donors.)
  - Plan and implement Advance Gift campaign phase with pastor.
Communications Committee
- Help articulate the parish case for support for the specific project or targeted phase of the parish master plan.
- Develop a parish brochure explaining the case in mission and ministry terms, including appropriate visuals. Recalling Fund Raising principle #5: “People give to people, not causes.”, make the brochure people-oriented.
- Develop a simple pledge statement or card for obtaining leadership and advance gifts, highlighting the spirituality of giving. You can use the standard PSA pledge envelopes for general parishioner gifts or design custom ones for your campaign.
- Prepare bulletin notices, bulletin inserts and periodic newsletters to keep your parishioners informed about the status of your PSA campaign and parish project.

Follow-Through Committee
- Assist the parish staff in generating timely thank you letters for the pastor to personally sign.
- Prepare a sample telephone script and train volunteers to contact non-donors.
- Organize and implement telephone campaigns and make sure results are recorded.
- Either this committee or the parish staff and PSA Secretary/bookkeeper prepare follow-up, redemption and thank you mailings.

PHASE II – Leadership Gift Solicitation (late Fall, prior to general campaign kickoff)
Target donors: Campaign Committee members first, then parishioners with the ability and proclivity to make the largest gifts are to be solicited by the pastor. Start with the prospective donor of the largest potential gift. This amount (though the donor remains confidential) sets the benchmark for other Leadership Gifts.
- What – the pastor presents the case and makes the “ask” directly in home visits, small group dinner(s) in the rectory and/or small group gathering(s) in peer parishioner homes. The committee will customize the approach that best suits the number of parishioners to be solicited, the time constraints of the pastor, the preferences and style of the pastor and well as the traditions of the parish.
- How – Personal relationships are very important. The pastor must demonstrate his own commitment to the project and his passion will engage others. Some parishioners will also “step up to the plate” if they know other people have already made sacrificial gifts to advance the mission of the parish. Provide advance information – a letter from the pastor with a brochure before making a phone call to make an appointment – so the parishioners know what to expect. Allow people time for prayerful reflection about the gift amount, and offer a simple pledge statement to sign. Major leadership gifts are best accepted in person rather than through the mail.
Note: It is not appropriate to give public recognition to donors of Leadership Gifts, particularly in a one year campaign, since all gifts should be proportionate to the blessings entrusted by God. However, the pastor should hand write a thank you note to these parishioners and may invite them to a small gathering at the rectory to celebrate the success of the campaign.
PHASE III – Advance Gift Solicitation

**Target donors:** Previous donors to the Pastoral Services Appeal or other parish campaigns. Share your parish plans with them in a group setting, let them know how important they have been and are to the parish and invite them to make a pledge first – in early December or January, before presenting it to “the people in the pew”.

1. Host a simple reception with a presentation and “ask” by the pastor in the parish hall, OR
2. Send special letter with both PSA and parish case brochures plus pledge card with return envelope.

The Committee sends invitations, arranges for refreshments, music, decorations, etc., prepares a PowerPoint or other presentation, provides hospitality during the event and assists the pastor by making presentations, giving testimonials or answering questions from individuals. The Committee assists with distributing brochures and pledge envelopes or cards.

PHASE IV – General Gifts Phase

*Use the Standard PSA Campaign guidelines on pages 18 and 19 for this phase.*

**Target:** Use *direct mail* to reach registered parishioners who have not made an advance or leadership pledge plus use *in-pew solicitation* to reach non-registered parishioners.

1. **In advance** – Send a letter from the pastor with PSA brochure and parish case brochure to all registered parishioners – excluding those who already made pledges.
2. **Appeal Weekend (Week 1)** – *PSA Video is shown at all Masses*
   The pastor speaks at all Masses (even where he does not speak the language) about the pastoral services of the diocese, the fact that financial giving is an act of worship and thanksgiving, and explains why the parish project is so important to the people and mission of the parish. He then asks parishioners to *pray about* and discuss their commitment as a family to help fulfill the mission of the parish, and come back the next week prepared to make a prayerful commitment.
3. **Pledge Weekend (Week 2)** – A lay person speaks at all Masses explaining why he or she believes it is important to support the Pastoral Services Appeal, especially this year because of the parish project, and leads people through completing the pledge envelope.
4. **Weeks 3 & 4** – Give a report on the response so far, thanking parishioners who already made a commitment and reminding others to participate in pulpit announcements and in the bulletin, plus staff a table after Masses to answer questions and accept pledges.

PHASE V – Follow-Through  *This phase can make all the difference in surpassing goals!*

1. The pastor sends a personalized thank you letter to all donors upon receiving their pledge.
2. Early spring – Make telephone calls to all non-donors.
3. Parish Celebration – special food and entertainment after all Sunday Masses after first round of follow-up is completed. (Generates excitement and builds sense of community.)
4. Pastor sends thank you note to all campaign volunteers.
5. Late spring or summer – Letter or telephone call to all remaining non-donors.
6. Request a pledge from all new parishioners when they register.
7. Fall – send “redemption” letter: a personalized letter to all donors with a balance on their account giving a campaign progress report and urging completion of the pledge, if possible. The diocesan PSA Office can provide an electronic list with current balances.
8. Accountability – Consider a weekly report in the parish bulletin on PSA participation, the amount pledged and paid, and the amount rebated toward your parish project to date (“keep it visible”).
9. Conduct a follow-up appeal in the Fall for those whose circumstances may have changed or some donors may increase their original pledge.
We Are One • 2018 Pastoral Services Appeal

PRINCIPLES FOR SUCCESS

#1 Get people to participate and the dollars will take care of themselves.
This appeal is about participation in the mission of the church. Our long term goal is 28% participation of registered families but it is currently at about 20% of registered households as a diocese. Every parish has a history of meeting its financial PSA goal so striving for the dollar goal is not the primary issue. People who have given in the past are more likely to give again and people tend to increase the size of their pledge each year, so the money will continue to come, in increasing amounts, from current donors. The real challenge is to motivate more people to make a commitment for financial support of the church through a PSA pledge. So again: “get people to participate and the dollars will take care of themselves.”

#2: Make it as easy as possible for people to make a pledge.
Easy on the donors, not necessarily easy on you. That means putting brochures, pledge envelopes and pencils in the pews instead of asking people to stand in line at a table after Mass or walk to the hall. Making it easy on donors also means including a self-addressed envelope in follow-up mailings and inviting people to drop their PSA pledge and payment envelope in the Sunday Offertory basket to save them postage. We have added several pledge payment options for the convenience of our donors.

#3: Respect people’s dignity by inviting everyone to participate.
People cannot respond if you do not give them the opportunity. Don’t hesitate to ask all parishioners to give a gift. Allow them to decide whether or not they can give, and at what level. It is not our place to make that decision for them.

#4: Use a variety of methods to reach a variety of people.
Some people are best motivated in writing, others visually, verbally or personally. Use several approaches – not just one – to reach a lot of people with your message. Some people will respond best to the spiritual reasons for participating, others will be motivated by the mission related ministries and still others by visible building projects.

#5: People give to people, not causes (and the most important person is the pastor!)
Personalize every written “ask” with the person’s name. With computers there is no reason to send an anonymous dear parishioner letter. The pastor must personally make the appeal at every Mass the first weekend, even if his talk is translated for him into another language. This lets all parishioners know that he considers them full members of the parish community and that he relies on everyone’s support. The sincere personal commitment and enthusiasm of the pastor and other leaders is contagious.

#6: Make the PSA an opportunity for spiritual growth.
Relate the appeal to our responsibility as disciples to help carry out the mission of Christ’s Church. Financial support of church programs and services is as much a part of our Catholic spirituality as is prayer and service to others. Encourage parishioners to make their pledge an expression of gratitude for all God has done for them. Include prayer for the success of the PSA and the ministries it supports in your campaign and consider inviting people to bring their gifts up to a basket at the altar on Pledge Weekend to demonstrate that their PSA pledge is a prayerful gift to God.
We Are One • 2018 Pastoral Services Appeal

PRINCIPLES FOR SUCCESS (CONTINUED)

#7: Effectively communicate the reasons to support the appeal.
Do so in all appropriate languages, both in writing and verbally. The reasons are both spiritual and practical, reflecting the important diocesan services and the parish case for support – preferably expressed in ministry terms (people affected vs. bricks & mortar). Repetition of the message in different ways increases understanding. Most people have to hear a message numerous times before they make it their own. Each time you publically invite people to participate in the PSA, you will reinforce your gratitude to those who have already pledged and will motivate more to participate.

#8: Set an example.
"People who give money become better askers, and people who ask for money become better givers." If the pastor, all parish priests, staff members and PSA chairpersons are convinced that the PSA is important to our faith and important to our diocese and our parishes, then people will be able to tell. Your words will carry the weight of your convictions and people will be open to following your lead. Therefore, the pastor and parish leaders should make their own pledges first. We can't expect others to do what we wouldn't do! It is suggested that the pastor turn in his pledge envelope during Mass to show his participation.

#9: To get different (better) results this year - try something different!
Every different thing you do in your campaign will have an impact on different people. This handbook contains ideas you may want to try to increase participation. For example: While mailing a pledge envelope may bring pledges from families who regularly make a pledge, you will get many more pledges if you also invite people to make a pledge using an envelope during Mass (many people in Mass on Sunday are not on your mailing list). In addition to the Pastor speaking at all Masses first Sunday; try having a lay person give a talk at all Masses the second weekend. Try sending an additional follow-up letter to non-donors in September; people’s circumstances may have changed.

#10: You can’t say “thank you” too often.
Acknowledge every gift with a letter from the pastor expressing appreciation for participating in the campaign. Express gratitude to everyone supporting the PSA in pulpit announcements and in the bulletin several times during the year, and account for how all of the rebated donations are being used in the parish. People like to see the fruits of their gifts – the difference their sacrifices make in the lives of others.
Homily Helps – Emphasize the Spirituality of sharing what God has entrusted to our care.

1. We who were baptized in Christ are called to follow him, and that includes participating in the mission of His Church, that is; to teach, preach, minister and serve in Jesus’ name.
2. We are each part of the Body of Christ which extends beyond our own parish to the larger community, throughout the diocese (local church) and to the worldwide universal church.
3. Since most of us can’t personally fulfill this responsibility other than by participating in parish ministries, the PSA provides a convenient way to participate in these good works by financially supporting diocesan programs and services, just as we do for the universal church through special collections for the missions, etc.
4. As Catholics, we set aside a portion of our income every year to carry out the work of God in the world and to care for those in need. In addition to the Sunday offertory for our parish, the PSA is one place to allocate some of those funds we have set aside for charitable purposes.

(Additional homily hints can be found at www.OrangeCatholicFoundation.org under the PSA tab and Parish Resources)

Prayers of the Faithful

The Pastoral Services Appeal is about more than raising money – it is a way we are challenged to put our faith into practice. Prayer, therefore, has a key role in the success of the PSA campaign.

- That through our Baptism, we share in the mission of Christ and show that we are Proud to be Catholic by making a pledge to the PSA...we pray to the Lord.

- That as we respond to God’s call to be generous stewards, we allow ourselves to be instruments for God’s work in our parish and diocese . . . we pray to the Lord.

- That as we make our commitment to the Pastoral Services Appeal, we may remember God’s generosity to us . . . we pray to the Lord.

- That the Lord will bring us together as one church family in building up His kingdom here at (name of church) as we work toward fulfilling our PSA goal... we pray to the Lord.

Bulletin Inserts

In addition to the Bulletin article, print a flyer on colored paper once or twice during the campaign to insert in the Bulletin. This is a good way to communicate a brief message in a BIG way. Consider listing donor names (except for those who wish to remain anonymous). Show the parish’s goal and actuals in both dollars and number of pledges in a chart or thermometer format. Emphasize helping accomplish the work of the church through monetary support, and restate the use to which rebate funds will be put. Remember, you can’t say thank you too often!

(additional bulletin announcements on following page)
We Are One • 2018 Pastoral Services Appeal

2018 PSA HOMILY HELPS/BULLETIN MESSAGES

The Annual Parish Services Appeal

We are one family as the Diocese of Orange and the annual Pastoral Services Appeal gives us the opportunity to share our blessings and many gifts with those around us who are in need.

Why should I give?

Our parish and each parishioner is part of the greater Body of Christ we call the diocese and the universal, worldwide Church. Gifts to the diocesan-wide Pastoral Services Appeal benefit people in our parish and neighborhood, as well as those in need throughout the diocese.

How much should I give?

Giving is a true act of worship and praise. Making a sacrificial gift is a sacred act that benefits others and changes the giver. Giving should be proportionate to one’s ability to give. Some suggest tithing — giving 10% of your household income: 5% to the charities of your choice, 4% to the parish and 1% to the annual Pastoral Services Appeal. If you are able make a 1 % offering, or make a larger pledge, you can spread payments out over the year.

We Are One!

Giving — deep Christian charity — draws us together, opens our heart to Jesus, and makes us One Body in Christ. Here at our parish << use example of how PSA rebates benefit people>>.

Each year the Parish Services Appeal makes us proud to be Catholic, inviting us to boldly embrace the call to deepen our commitment to Jesus and grow in charity. Join your fellow parishioners who have already made a gift to the annual appeal.

As one Body in Christ we believe that “he came that we might have life.” He promised: “I will live in you and you will live in my love.” For more information or to view the “We are One” video please visit www.orangecatholicfoundation.org.

2018 PSA Bulletin Ad—“We Are One”
Available for download at www.orangecatholicfoundation.org under PSA/Parish Resources
We Are One • 2018 Pastoral Services Appeal

Sample Bulletin Messages

One Week Prior to PSA Appeal Weekend
The annual PSA will start in our parish on (date). The PSA provides an opportunity for us to join together as one church family in realizing our goals as well as join with Catholics throughout the Diocese of Orange to support ministries and services that benefit our own parish as well as people all over Orange County. Look for a letter from (pastor) along with a brochure about the PSA in the coming week, and prayerfully consider how your family will respond to this call to carry on Christ’s work in our community.

PSA Appeal Weekend (Week 1)
As an extension of our parish membership, we are also a member of the Diocese of Orange. This dual Catholic citizenship makes you an integral part of all diocesan activities as we come together in support of Catholic Education, charitable services for the needy and the sacramental life of our Church through clergy formation and support and so much more. Every household is encouraged to show that they are Proud to be Catholic by supporting the work of our Church and participating in this appeal. No gift is too great or too small. Once we have met the goal for our parish’s share for diocesan services, your donations will be returned to our parish for (state parish case). You will have an opportunity to make your pledge during the Masses next weekend.

PSA Pledge Weekend (Week 2)
“We Are One” - Our parish goal for the 2017 Pastoral Services Appeal is for at least (number) of families to pledge ($_______) to support Faith Formation, Outreach Ministries, Clergy Formation and Support and parish and diocesan advancement. Gifts made over that amount will go toward (explain case) our own parish. The PSA provides a convenient way for all of us, no matter what our time limitations, to take an active role in the mission of the church. As a guide to a proportionate gift, please consider pledging a percent of your income, or the pay for one or two hours work each month for ten months. You can submit your PSA Pledge Envelope during Masses this weekend or next, or return them to the parish office.

Follow-Up Weekends (Weeks 3 & 4)
“We Are One” - Thank you to the (number) families who have already pledged to support the mission of the church to teach, preach, minister and serve in the name of Jesus through their financial contribution to the 2017 Pastoral Services Appeal. We are nearing our goal of ( )% participation and at least $( ). If you have not yet made your pledge, you may do so this weekend at the PSA table after Mass or during the week in the parish office.

OR

“We Are One” - Thank you to the (number) families who have pledged to support the mission of the church in our diocese through their commitment to the Pastoral Services Appeal. Now that we have passed our goal of ($ ) in pledges, all additional gifts will go directly to support our parish (specify how rebates will be used). If you have not yet made your pledge, you may do so this weekend at the PSA table after Mass or during the week in the parish office.
(PARISH NAME)
2018 PASTORAL SERVICES APPEAL

Progress Report

<table>
<thead>
<tr>
<th># of Registered Families</th>
<th>2018 Parish Goal (# of Pledges)</th>
<th>Pledges as of (date)</th>
<th>Total Pledges (previous year)</th>
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</thead>
<tbody>
<tr>
<td>3300</td>
<td>1000</td>
<td>468</td>
<td>495</td>
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</tbody>
</table>

THANK YOU...

To all who have prayerfully and generously made a pledge in support of our church.

Every pledge, no matter what the size, is valued and appreciated. If you have not done so yet, you are invited to make a pledge by either dropping your pledge envelope in the collection basket, or sending it to the parish office. Please join with your church family to reach our goal.

Pledge envelopes and brochures may be obtained in the church vestibule or at the parish office.

It was not you who chose me, but I who chose you to go and bear fruit.”

John 15:16

This and other bulletin inserts in Publisher format can be found at www.OrangeCatholicFoundation.org
OUTLINES FOR LETTERS FROM THE PASTOR

Personalize your letters to reflect the unique personality of the pastor, the parish mission, the social-political-economic environment of the times, the current gospel themes and the theme of this year’s Pastoral Services Appeal.

APPEAL LETTER

Participated last year
Intro: We begin this new year with the opportunity to commit to follow Christ more closely … I encourage you to make a plan for developing and sharing your faith as well as all of the other gifts God has bestowed on you.
* I hope you will include the PSA in your plan again this year for sharing your financial resources to build up the local Church and care for those in need…
PSA: Presents an opportunity to actively participate in the mission of the Church throughout Orange County, providing services and programs to serve people both within and outside our parish. The enclosed brochure explains how the diocese will use your gift to support the mission … Once our parish goal of $XXX is paid, all additional gifts will be returned to our parish to do… (rebate case)
Plan: I will be speaking at all the Masses next weekend to speak about the important services provided by the diocese, with your help, and to share with you our plans for our own parish. I will ask you to reflect during the week on your own blessings, the needs of our church, and to pray about how God wants you to respond.
The following weekend I have asked (name) to speak about the importance of participating in the PSA and you will be asked to make your pledge at that time.
** I hope I can count on your participation again this year – your continued support is a great encouragement to me in my ministry here at (parish name).

Did not participate last year
Same as above except:
* Delete word “again”
** Delete word “again” and “continued”, plus change “is” to “would be”

THANK YOU LETTER

Intro: Thank you so much for your recent pledge of ($XXX) to the Pastoral Services Appeal to support the ministries and services of the Diocese of Orange and the (rebate project) for our parish. Your support means a great deal to me and to our church. Most of all it is a commendable expression of your faith.
Status: Your pledge, along with those of (number) other families in our parish, have already totaled ($XXX,XXX). This is a sign of what we Catholics can accomplish to further the mission of Christ’s Church when we join together and share the gifts God gives us.
Close: May the Lord bestow abundant blessings on you and your family this year, just as your gift provides blessings to many others.

Additional Sample Letters on following page
Dear (personalized name) or Friends in Christ,

One of the most exceptional parts of belonging to (name of parish) is the feeling of belonging: we are part of something much greater than any one person. Our Church connects us all— as neighbors, as a community, as children of God and followers of Christ.

I am heartened by all the good work I see accomplished through our parishioners’ dedication of their gifts of time, talent and treasure. From faith formation, to outreach in the community, to social and community activities, our parish is alive in the spirit.

For 2018, our PSA goal is $XXX,XXX (total goal including rebate goal). I am confident that together we can reach this extraordinary goal. Think how much of an impact these funds can make, not only in our parish, but in the greater Catholic community as well. Last year, our rebate was used to (insert parish case for 2018). This year, our parish rebate will be used to (state 2018 parish case).

We’ve included a pledge envelope for your consideration and return, detailing the various payment options and guidelines to help you determine what your gift will be. It is important that you prayerfully discern and listen to your heart when making your decision for your pledge.

Your response to God’s generosity is of great consolation to me as your pastor, and I hope that I can count on your participation this year. I am inviting you to join me and your parish family in making your pledge on our commitment weekend of MONTH XX. Your continued support is a great encouragement to me in my ministry here at (parish name) as we continue our work of Christ.

You and your family remain in my prayers.

Sincerely yours in Christ,

Rev. Pastor Name
We Are One • 2018 Pastoral Services Appeal

Sample Thank You Letter

Dear (personalized name):

I want to thank you personally for your faithful response to the Pastoral Services Appeal and your recent pledge to support the mission of (parish name) as well as the vital ministries of our local Church of Orange.

Our building projects (or name parish case) will be funded through the rebate of all funds raised over and above our parish commitment to the Diocese. Your pledge, along with those of over (enter number) families in our parish who have pledged to-date, totals over $__________. This is a sign of what we Catholics can accomplish to further the mission of Christ’s Church when we join together and share the gifts God has blessed us with.

As Catholics, we should be proud of the impact we have in our own community of (city name), but also together with our brothers and sisters in Christ from the other 61 parishes and centers in our diocese, we make a monumental impact on the community at large. Tens of thousands of people each year are impacted by the ministries supported by the PSA.

As we approach the holy season of Easter, may the Lord bestow abundant blessings on you and your family, just as your gift provides blessings to many others. If you have any questions about this campaign, please contact our PSA campaign chair, (name), at (714)_________, or contact me directly at (XXX) ____________.

Yours in Christ,
Pastor Name

Sample Follow-Up Letter (for Non-Responders)

Dear (personalized name),

A couple of months ago, we launched the 2018 Pastoral Services Appeal (PSA) campaign with the theme, “We Are One”. As Catholics, we should be proud of the impact we have in our own community of (city name), but also together with our brothers and sisters in Christ from the other 61 parishes and centers in our diocese, we make a monumental impact on the community at large. I am inspired by the faith and generosity of more than (insert number) families in the (name of parish) faith community who have already prayerfully made a pledge to the 2018 PSA.

I am pleased to report that, to date, (name of parish) parishioners have pledged nearly ($_____) which surpasses our diocesan goal of ($______). All payments over that goal will be returned to our own parish to use for our own project. I am grateful for this outpouring of support in these demanding times.

Our goal for this year is to raise enough funds to (enter parish case for support). I am writing to you because you did not respond when I asked for your PSA pledge in (month), but I am hoping that your personal situation has changed since then and that you are now able to join the rest of your parish family in supporting the PSA. Won’t you take a moment to return the enclosed pledge card and make your own sacrificial gift?
We Are One • 2018 Pastoral Services Appeal

1st FOLLOW-UP LETTER (LYBUNT—Last Year But Unfortunately Not This) Immediately after in-pew appeal is conducted. LYBUNT Report available on Raiser’s Edge parish dashboard

Participated last year but not yet this year.

Intro: I am inspired by the faith and generosity of the people here at (parish name) as evidenced by the tremendous response already to the annual Pastoral Services Appeal. In case you were not at Mass on (date), enclosed is a copy of the talk I gave explaining the importance of the PSA to the Church throughout Orange County and to our own parish. Already (number) families have pledged ($XX,XXX) to support the work of our church, and I have not even received your pledge yet.

Ask: *Trusting that our Lord has continued to bless you and your family in many ways, I hope that you will be able to participate in the PSA again this year.
**Your continued financial support means a great deal to me and is a practical way for you to answer your baptismal call to spread the Good News and care for God's people.

Close: For your convenience I have enclosed a PSA pledge envelope that you can simply put in the offertory basket at Mass next weekend. Thank you for your prayerful consideration of my request.

Did not participate last year

Same as above, but eliminate references to
  * "again"
  * "continued"

2nd FOLLOW-UP LETTER Summer and/or Fall

Intro: As you have probably noticed in our parish bulletin, (number) of our parish families are supporting the Pastoral Services Appeal with the monthly payments they pledged. As a result, our parish community has provided ($XX,XXX = parish goal) toward the ministries, services and programs of the Diocese of Orange which serve people throughout Orange County. These payments have also resulted in ($XX,XXX) so far in rebates to our parish which we are using for (parish rebate project). All future payments to the PSA this year will also be applied to this project.

Ask: I am writing to you because you did not respond when I asked for your PSA pledge last winter, but I am hoping that your personal situation has changed since then and that you are now able to join the rest of your parish family in supporting the PSA. For your convenience, I have enclosed a pledge envelope which you may drop on the offertory basket at any Sunday Mass. You might pledge to make (number) monthly donations, the number of months left in this calendar year. Even if you are not able to make a pledge now, you may still make a one time gift in the envelope, so you can share in what we are accomplishing as the people of God at (parish name). No gift is too large or too small.
We Are One • 2018 Pastoral Services Appeal

PSA Speaker’s Bureau
List of Speakers from PSA-Funded Ministries
Available to Speak at Your Parish

Catholic Charities of Orange County

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Email</th>
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<tbody>
<tr>
<td>Tita Smith</td>
<td>Executive Director</td>
<td><a href="mailto:tsmith@ccoc.org">tsmith@ccoc.org</a></td>
<td>714-347-9680</td>
<td>Holy Family</td>
<td>English/Spanish</td>
</tr>
<tr>
<td>Becky Tamondong</td>
<td>Executive Ass’t.</td>
<td><a href="mailto:rtamondong@ccoc.org">rtamondong@ccoc.org</a></td>
<td>714-347-9628</td>
<td>Santa Clara De Asis</td>
<td>English/Tagalog</td>
</tr>
<tr>
<td>Zenaida Yolo</td>
<td>Controller</td>
<td><a href="mailto:zyolo@ccoc.org">zyolo@ccoc.org</a></td>
<td>714-347-9648</td>
<td>San Antonio De Padua</td>
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<tr>
<td>Alba Ramiro</td>
<td></td>
<td><a href="mailto:aramiro@ccoc.org">aramiro@ccoc.org</a></td>
<td>714-347-9668</td>
<td>Our Lady of Guadalupe</td>
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<tr>
<td>Lang Ton</td>
<td></td>
<td><a href="mailto:lton@ccoc.org">lton@ccoc.org</a></td>
<td>714-839-4057</td>
<td></td>
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Office of Restorative Justice/Detention Ministry

<table>
<thead>
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<tr>
<td>Fred LaPuzza</td>
<td>Director</td>
<td><a href="mailto:flapuzza@rcbo.org">flapuzza@rcbo.org</a></td>
<td>714-282-4261</td>
<td></td>
<td>English</td>
</tr>
<tr>
<td>Deacon Martin Ruiz</td>
<td>Program Coordinator</td>
<td><a href="mailto:mruiz@rcbo.org">mruiz@rcbo.org</a></td>
<td>714-282-4266</td>
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Catholic Deaf Community

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<tr>
<td>Nancy Lopez</td>
<td>Director</td>
<td><a href="mailto:nlopez@rcbo.org">nlopez@rcbo.org</a></td>
<td>714-282-6019</td>
<td>Diocesan Pastoral Center</td>
<td>English, Spanish</td>
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Catholic Schools

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<tr>
<td>Sally Todd</td>
<td>Assistant Superintendent</td>
<td><a href="mailto:stodd@rcbo.org">stodd@rcbo.org</a></td>
<td>714-282-3126</td>
<td>Diocesan Pastoral Center</td>
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Diocesan Pastoral Services Appeal

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<tr>
<td>Frank Chavez</td>
<td>Director, Diacate Formation</td>
<td><a href="mailto:fchavez@rcbo.org">fchavez@rcbo.org</a></td>
<td>714-282-3037</td>
<td>Christ Our Savior Parish</td>
<td>English, Spanish</td>
</tr>
<tr>
<td>Fr. John Moneypenny</td>
<td>Director, Vocations</td>
<td><a href="mailto:jmoneypenny@rcbo.org">jmoneypenny@rcbo.org</a></td>
<td>714-282-3046</td>
<td>Diocesan Pastoral Center</td>
<td>English</td>
</tr>
</tbody>
</table>
The Lay Speaker
A member of the PSA Committee should speak at each Mass the second week of the campaign (or whichever week works best for your parish). Because part of the purpose of the lay talk is to give witness to that person's commitment to financially support the mission of the church, the person/s selected should be known in the parish community for their participation in parish life and should already have made a PSA pledge.

The Talk
The actual talk should take about 3-4 minutes (or appropriate time for your parish). You will be introduced by the presiding priest after a brief homily (or whichever timing is appropriate for your parish) and can use your notes when you give your talk. Make a list of the main things you will say, using the outline below and referring to the PSA Brochure and this Handbook. You may write out your entire talk, but it is much more sincere to speak from an outline than to read from a prepared talk.

The Talk Outline
I. Introduction
   • Tell who you are so people can relate to you - your family, parish involvement, work or other things you would like people to know about you.
   • Mention something in the readings of the day that relates to the appeal, such as being a good steward of God's gifts, a disciple/follower of Christ or our responsibility for others.

II. Pastoral Services Appeal
   • Explain the relationship between each parishioner, the parish, the diocese or local church, and the universal church – all part of the Body of Christ.
   • Briefly describe some of the diocesan services funded by the PSA which benefit your parish as well as those that serve individuals in need.
   • Describe the project for which your parish will use PSA rebates in terms of the difference it will make in people's lives and in fulfilling the mission of the parish.

III. Spirituality of Giving
   • Explain that sharing the financial gifts we received from God in support of the mission of His Church is an act of worship and praise.
   • Describe a sacrificial gift – one that is "sacred" because it changes the life of the giver.
   • Explain a proportionate gift – either a percentage of income or one or two hours of pay (as outlined on the back of the PSA Pledge Envelope) or an amount greater than what the family spends on something it really doesn't need, such as Starbucks coffee, gym membership or eating out.
   • Tell people that you and your family discussed your gift and prayed that it would be a grateful response. Without disclosing the amount, share how you make your decision.

IV. Invitation to Pledge
   • Explain that a pledge paid over time is easier to fulfill and makes a larger gift possible.
   • Ask people to prayerfully discern their response to God's generosity in their lives and to make a pledge to the PSA as "equal sacrifice, not equal gifts". Meaning that for each of us this will be a different amount.
We Are One • 2018 Pastoral Services Appeal
Pastoral Services Appeal Telephone Follow-up Campaign

Why a Telephone Follow-up
People give to people – so the more personal the appeal, the more likely people are to respond. A request to make a pledge over the phone is more effective than a letter, just as a face-to-face request is even more effective than a phone call. Since these two methods require the most volunteer hours, however, they should follow the direct mail and in-pew solicitation phases of the PSA campaign and be reserved for follow-up with parishioners who did not donate during the initial appeal. A telephone call conveys the immediacy of the need, and there is no need to wait for returns in the mail or for volunteers to complete home visits. The net result of a PSA Phon-a-thon will be more participation and larger rebates.

How to Organize
One or two members of the PSA Committee coordinate the telephone follow-up campaign, identifying prospective donors, recruiting and training volunteers, and making sure records are updated with results.

1. **Volunteers** – Obtain enough callers to reach all parishioners not yet making a pledge within one week. All volunteers must have already made their pledge. To determine how many callers are needed, plan on about 20 calls per person in a one-hour calling session. (A second or third call will be required for people not reached on the first call.) First make calls to those who pledged in the past (the diocese will provide a LYBNT list on request). Then call all non-donating parishioners who regularly use Sunday offertory envelopes. If you do not have enough volunteers to call every non-donating household, send a follow-up letter to the remaining parishioners. In this way you will contact the people who are most likely to participate first.

2. **Preparation** – The Committee identifies the parishioners to be called and organizes the needed information either on a printout (one or two sheets per caller) or on index cards with parishioner labels. In addition to the parishioners’ name, address and telephone number, there should be an indication of whether or not the parishioner donated the previous year. The amount a family donated is confidential information so it is best if the callers do not have that information. The PSA Phone-a-thon should be announced to parishioners in advance. One way is to announce from the pulpit that “All parish families that have not made a PSA pledge will be called next week. To save one of our volunteers some time, you can complete a pledge envelope found in the pews today and place it in the offertory basket.” Another way is to advise people of the coming telephone campaign is to send a letter to everyone targeted for a call, enclosing a pledge envelope and announcing that they will be called by a volunteer soon.

3. **Calling Sessions** – Gather all volunteers for a "call-a-thon" one or more evenings as needed, using multiple parish and school lines plus cell phones. Provide refreshments and name tags and make this an enjoyable experience. The most considerable time to place calls is between 6:30 and 9:00 p.m. on weeknights or on Sunday afternoons. The Committee conducts a brief (15-30 minute) training prior to each calling session. Begin with prayer, inviting the Holy Spirit into your group, for you are doing the Lord’s work! Provide each volunteer a copy of the instructions and a sample script and do a role-play of the script and how to answer objections. Also provide a copy of the PSA brochure and a fact sheet about the parish rebate project pointing out highlights and answering any questions. Then give each volunteer a prepared list or stack of cards of the parishioners to call. If volunteers would prefer not to call a particular person on their list, reassign the contact, just as if they prefer to call a particular family on another person’s list. This will enhance their confidence and effectiveness. Make sure the list or cards include a place to write notes for each call and the instructions identify the type of notations to make.
4. **Wrap-up** – At the end of each session collect all lists, cards and notes. Announce the total of all the new pledges received and celebrate! You might give a small gift to the volunteer who obtained the most pledges in that calling session. The committee will then make sure all pledges are recorded and processed, that any information a parishioner requested is sent and that any pertinent comments are forwarded to the pastor. After all calling sessions are completed, summarize the number of calls made by the number of people who volunteered, and the total number and dollar amount of pledges received as a result. Also summarize the major types of responses or objections. This evaluation will help you plan an effective Phone-a-thon next year.

**Tips for Callers**

- Most people have heard about the Pastoral Services Appeal or PSA but don’t really know much about it. Be prepared to answer questions and clarify misconceptions about how the money is used by the diocese and how rebates are paid to the parish.
- You are not pressuring people to give, just making sure they are invited to participate in the work of the church. Your call gives them a chance to ask questions and voice their concerns.
- Be considerate and a good listener – by giving of their time the parishioner is doing you a favor.
- Stick to the truth, saying you “don’t know but will find out” if necessary. An untrue statement casts doubts on everything you say.
- Don’t be apologetic about asking for a gift – Christ called all disciples to participate in the building up of his kingdom. You are simply giving the parishioner an opportunity to do this.
- Your phone call is also a way to let parishioners know that the parish knows they are members, and to identify any pastoral needs they may have.

**Sample Script #1** (Previous PSA donor)

_Hello, this is ___________________________ from ___________________________ parish._

_May I speak to ( _______ name _______ )? How are you this evening?_

_I’m volunteering my time tonight with a group of other parishioners to request your support for the Pastoral Services Appeal. As you probably know, the PSA not only provides important services for people and parishes throughout the Diocese of Orange, but we are also relying on the rebates our parish earns to ( describe parish project ). Our records show that you have participated in the PSA in the past, so you must realize all the good that comes from this appeal. Let me thank you for your past support and ask if you would renew your commitment to support these important ministries and projects of our church this year. If you like, I can take your pledge over the phone._

(Listen for response and answer accordingly)

**Sample Script #2** (Non-donor)

_Hello, this is ___________________________ from ___________________________ parish._

_May I speak to ( _______ name _______ )? How are you this evening?_

_Father ( pastor’s name ) asked our PSA committee to contact parishioners who have not yet responded to his request to support the Pastoral Services Appeal. As you probably know, the PSA not only provides important services for people and parishes throughout the Diocese of Orange, but we are also relying on the rebates we earn to ( describe parish project ). Our goal is for 100% participation by our parishioners in order to raise $XX,000 this year for diocesan ministries and another $XXX,000 for our own parish project – a total of $XXX,000. So far XXX families have pledged $XXX,000, so we need your help to reach our goal. Would you like to make a pledge now? I can take it over the phone._

(Listen for response and answer accordingly)

**Close for Positive Response**

_*That’s great, thank you so much. Let me review your intention to make sure I have it right._ (Restate the pledge amount, payment schedule and verify donor’s address and spelling of the name.)_
We Are One • 2018 Pastoral Services Appeal

Is this correct? Thank you again on behalf of Bishop Vann, Father (pastor) and all of your fellow parishioners. Before I hang up, do you have any questions or comments you want me to pass on to Father (pastor’s name) for you? Thank you for your time. Good night.

Close for Another Response

(As you requested, I will be sure to send you . . . have someone call you about . . .) Perhaps you will be able to support the Pastoral Services Appeal sometime in the future. Do you have any questions or comments I could pass on to Father (pastor’s name) for you? Thank you for your time. Good night.

Sample Voice Mail Message

If you don’t reach the parishioner in person, leave a message but don’t ask the parishioner to return the call. Only after three unsuccessful attempts to contact the parishioner should you leave your number and request a return call.

This is ___________ from ________________ Church calling for Mr. or Mrs. (Name).

I would like to talk with you about the Pastoral Services Appeal and its importance to our church. I will call back later/tomorrow to speak with you.

Talking Points

- The PSA is the annual appeal to support pastoral ministries throughout the Diocese of Orange.
- This is also how our parish is generating funds for our building fund for (________ project_________).
- You can make a pledge tonight and spread your payments over (_____ ) months – until the end of the year. The diocese will send you a reminder of your pledge every month until it is paid.
- If you prefer, you can arrange for quarterly reminders or automatic monthly payments from your bank. You can even pay your entire PSA pledge by MasterCard or Visa or donate appreciated stock as your gift to the church.
- The amount to give is a personal decision, but you might consider a monthly pledge of one or two hour’s pay, or at least the amount you are spending on something that is not as important – such as cable TV or gym membership, golf games or movie tickets.
- Your contribution is tax deductible.
- No gift is too small – your participation in the work of the church to the best of your ability is what is important.

Objections and Suggested Responses

In most cases, an objection only means that the parishioner does not understand something or needs more information. Listening to and recording objections is a good way to find out how to better communicate to all parishioners. Let people know that their criticisms and concerns are welcome. Give “yes, but” responses, acknowledging their position without judgment, then adding a statement that either clarifies the misunderstanding, balances the negative with a positive, or asks for prayer.

- Can’t talk right now...I’m sorry. When is a better time for me to call you back?
- I’ll think about it...Good, supporting these good works is definitely worth considering. Would you like me to send a copy of the brochure for you to review as you give it more thought?
- Upset with the church (parish or diocese)...I can understand why you feel that way, but remember that in spite of the human problems our church has, a tremendous amount of good is also done.
- Concerned money will be used for clergy sexual abuse lawsuits...Donations to the Pastoral Services Appeal are legally restricted only for the pastoral ministries and services provided for people in Orange County by the diocese and to parish rebate projects. Also, the Orange Catholic Foundation is a separately incorporated 501(c)(3) that collects the gifts and is protected legally by canon and civil law.
- Can’t afford to give...It is not the size of the gift as much as joining other parishioners in these good works that is important. But if you cannot make even a small gift at this time, can I ask you to say a prayer for the success of the appeal? In that way you can still participate.
- The church is always asking for money...The church asks for money because there are so many people who need services and to be ministered to. Giving money is a way you and I can help do that even if we don’t have the time or skills to serve people personally.
## We Are One • 2018 Pastoral Services Appeal

### PSA Checklist for Fall Follow-Up Appeal

<table>
<thead>
<tr>
<th>Done</th>
<th>Follow-up Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reconvert your PSA Steering Committee to make plans for your Fall follow-up appeal.</td>
<td>Order additional brochures/pledge envelopes from OCF if needed</td>
</tr>
<tr>
<td>- Hispanic community: approach using “Bishop's promesa” or “Our Lady of Guadalupe” wording and ask for cash pledges over one or more weekends</td>
<td>Stock pews and vestibule with pledge envelopes and brochures for follow-up appeal weekend</td>
</tr>
<tr>
<td>- Vietnamese community: approach through the Vietnamese leadership council</td>
<td>Pastor makes follow-up appeal from pulpit emphasizing parish case and update on progress</td>
</tr>
<tr>
<td>Include petitions in the Prayers of the Faithful</td>
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</tr>
<tr>
<td>&quot;In gratitude to all parishioners who generously support our parish vision through the Pastoral Services Appeal, we pray...&quot;</td>
<td>Schedule lay witness speakers to tell their story of why they participate (include all languages the parish serves)</td>
</tr>
<tr>
<td>Publish names of all PSA participants in the bulletin alphabetically (no pledge amounts shown)</td>
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</tr>
<tr>
<td>Keep the thermometer chart posted in a prominent area showing your goal and progress</td>
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</tr>
<tr>
<td>Report results in the parish bulletin weekly</td>
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</tr>
<tr>
<td>Send follow-up letter to everyone who did not make a pledge using LYBUNT (last year but unfortunately not this or 3-year Trend Report) – customized parish reports available on line at <a href="https://apps.blackbaud.com">https://apps.blackbaud.com</a> Raiser's Edge OnDemand System.</td>
<td>Send follow-up letter to everyone who did not make a pledge using LYBUNT (last year but unfortunately not this or 3-year Trend Report) – customized parish reports available on line at <a href="https://apps.blackbaud.com">https://apps.blackbaud.com</a> Raiser's Edge OnDemand System.</td>
</tr>
<tr>
<td>Make follow-up phone calls to those who made a pledge last year, but not yet this year (off LYBNT report)</td>
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</tr>
<tr>
<td>Send thank you letters to all new participants</td>
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</tr>
<tr>
<td>Plan a celebration/thank you for all PSA volunteers/consider listing their names in the bulletin/give small token of gratitude</td>
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</tr>
</tbody>
</table>

### CELEBRATE THE FRUITS OF YOUR PROGRESS!!

If you follow these steps you can experience an additional 20-25% participation and reap additional rebates for your parish!
End of the Year PSA Messages
For Your Bulletin

English

PSA End of Year Gift Bulletin Blurb:
As we approach the end of the year, you may consider increasing your PSA pledge for 2018. All gifts postmarked by 12/31/18 will be applied toward our 2018 PSA campaign and should be turned in at the parish office or dropped in the collection basket. Stocks are also a good way to make an end-of-year gift. Stock gift forms can be found at www.OrangeCatholicFoundation.org or to make an end of year electronic gift. May God bless you for your generosity!

Thank You Bulletin Blurb:
Thank you to all those who joined together in helping our parish (or name of parish) reach our PSA goal for 2018! Together we make a difference in our faith community. At the end of the year, you may consider making a stock gift to your parish or to the PSA. All gifts received through the end of December will count toward our 2018 parish campaign. You may also go to www.OrangeCatholicFoundation.org for stock gift forms or to complete or increase your pledge. Your faithful response in sharing your gifts is truly a blessing to our entire community.

Spanish

PSA- Mensaje de Fin de Año para el Boletín parroquial:
Mientras nuestro fin de año se acerca, usted podría considerar incrementar su promesa para los Servicios Pastorales del 2018. Todas las donaciones marcadas por el servicio postal como recibidas el 31 de diciembre o antes serán aplicadas a su promesa de este año y deben ser enviadas directamente a la Fundación Católica de Orange, 13280 Chapman Ave., Garden Grove, CA. 92840. O bien puede hacer su pago en el internet usando nuestra página en www.OrangeCatholicFoundation.org, Que Dios bendiga su generosidad!

Mensaje de Agradecimiento para su Boletín parroquial:
Gracias a todos los que se han unido a apoyar a nuestra parroquia (o ponga el nombre de la parroquia) en alcanzar la meta para los Servicios Pastorales del 2018! Juntos hacemos la diferencia en nuestra comunidad de fe. Todos las donaciones recibidas en el mes de diciembre contaran para la campaña del año 2018. También puede ir a www.OrangeCatholicFoundation.org para completar o incrementar el total de su promesa. Su respuesta fiel en compartir sus regalos realmente es una bendición a toda nuestra comunidad.
We Are One • 2018 Pastoral Services Appeal

PSA PLEDGE AND BATCH PROCESSING

All pledge processing is entered through the Raiser’s Edge OnDemand site by each parish using your same parish username and passwords from 2017.

If you need to be reminded of your username and/or password, please email Anna Orozco at aorozco@OrangeCatholicFoundation.org or call (714) 282-3048.

Personalized onsite training is available by contacting Anna Orozco at aorozco@orangecatholicfoundation.org.

IMPORTANT: Please note that parishes should input credit card and EFT pledges into the online batch submittal system. All credit card and EFT pledges should be sent along with a batch submittal form to the lockbox for processing.

**Please include email addresses in Raiser’s Edge for donors that provide this information on the pledge envelope. This helps us to be able to follow-up with donors more efficiently.

Allow 5-7 business days from the date you mail the batch to the lockbox for the batch to be committed to the system and show in your reporting.

List of Reports Available Online through your OnDemand Parish Dashboard throughout the campaign:

- LYBUNT (Last Year But Unfortunately Not This)
- Donor Report
- 3-Year Trend Report

Available under PSA Parish Resources section of www.OrangeCatholicFoundation.org under PSA/Parish Resources:

- PSA Logos
- PSA Templates
- Sample Bulletin Announcements/Ads
- Sample Letters
- Matching Gifts List of Companies
- Material Order Forms

Security bags are provided at the beginning of the campaign year by OCF for mailing of batches to Farmer’s & Merchants Lockbox. For additional materials, please contact Anna Orozco.
Instructions for Giving Stock to the Orange Catholic Foundation

If the stock is in a brokerage account:

Step 1: Contact your broker to have the gifted stock transferred to the Orange Catholic Foundation. Below is the information you will need to proceed with the transfer:

Official Name: Orange Catholic Foundation
Corporate Tax ID: 33-0934571

Orange Catholic Foundation Broker: Kevin Tiber
Farmers and Merchants Bank
302 Pine Avenue
Long Beach, CA 90802
(562) 437-0011

Free deliver to the BMO Harris Bank N.A: Depository Trust Company: (DTC)# 992
Account #: 74-2082-01-9 Farmers and Merchants Trust Company. F/C 82-60-0011-01-9 OCF

Step 2: Please complete the "Authorization for Transfer of Gift Securities" form (included with these instructions) and forward it to both Yolanda Wright and Kevin Tiber at the addresses below:

Ms. Yolanda Wright
Senior Funds Coordinator
Orange Catholic Foundation
Diocesan Pastoral Center
13280 Chapman Avenue
Garden Grove, CA 92840
Phone: (714) 282-3134
Fax: (714) 282-3135

Mr. Kevin Tiber
Sr. Vice President / CEO
Farmers and Merchants Bank
302 Pine Avenue
Long Beach, CA 90802
kevin.tiber@fmb.com
Phone: (562) 437-0011
Fax: (562) 436-5048

If the stock gift is in the form of a stock certificate registered in your name(s):

Step 1: Deliver the stock certificate(s) plus a signed "Authorization for Transfer of Gift Securities" form to the address above. The donor's or donors' signature(s) on the Third Party Release form must be notarized for the Orange Catholic Foundation to sell the stock.

Your tax deduction is the median price of your stock on the date the stock transfers to the Orange Catholic Foundation or the date you deliver your stock certificates to our office.
Authorization for Transfer of Gift Securities

Name: ____________________________
Address: ____________________________

Dear Orange Catholic Foundation,

Please accept our donation of _ _ _ _ _ _ shares of ____________
(# of shares) (Name of Security)

For the benefit of: (Specific Fund/Endowment, Parish, School, Donor-Advised Fund, OCF Fund, Other)
The charitable entity MUST BE LOCATED BY THE DIOCESE OF ORANGE IN CALIFORNIA and be a parish, school, or organization listed as "The Official Catholic Directory." Please call the OCF office to confirm that the charity is in the Diocese of Orange and is not outside our scope of support.

Entity 1. ____________________________ 2. ____________________________ 3. ____________________________ 4. ____________________________ Dollar/Percent Split ____________________________ ____________________________ ____________________________ ____________________________

Gifts to the Foundation will be presumed to be for general unrestricted purposes unless otherwise indicated above.

Free delivery from donor’s brokerage firm or bank:
Broker/contact name and phone: ____________________________
Name(s) on account: ____________________________
Account number: ____________________________

Free deliver to BMO Harris Bank N.A.: DTC 992, Account #74-2082-019 Farmers & Merchants Trust Company. For further credit to: Orange Catholic Foundation 92-69-0011-01-9 (See Entity Above)

If you have questions regarding this transfer, please contact Kevin Tiber at (562) 437-0011.

Signature/Date ____________________________ Signature/Date ____________________________

Print Name: ____________________________ Print Name: ____________________________

Donor address: ____________________________ (Address) ____________________________ (City) ____________________________ (State) ____________________________ (Zip) ____________________________ E-mail: ____________________________

This gift letter needs to be signed by the donor exactly as the name or names appear on the account from which the stock is being transferred. All account owners must sign.

IMPORTANT! CC or Fax Copy:

Yolanda Wright
Orange Catholic Foundation
Diocesan Pastoral Center
13280 Chapman Avenue
Garden Grove, CA 92840 (714) 282-3134
FAX: (714) 282-3136
Email: YWright@OrangeCatholicFoundation.org

Kevin Tiber
Farmers & Merchants Bank
302 Pine Avenue
Long Beach, CA 90802 (562) 437-0011
FAX: (562) 435-5048
Email: Kevin.Tiber@fmb.com

Rev. 3/6/2015
Campaign Prayer

Heavenly Father,
With gratitude for Your abundant blessings,
we open our hearts in service to others.
Help us to proclaim our faith joyfully,
to speak clearly and tenderly about our values
and to live with a giving heart.
Empower us to witness the transformational power of Your love
in our neighborhoods, parishes, schools and homes.
Grant us the grace to accomplish together, as a family of Catholics,
the many things we could not do alone. Amen.