



Archdiocese of New York

Beyond Sunday Morning

2021 Parish IOC Manual

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I. Introduction

Beyond Sunday Morning is an offertory program designed to (1) inspire intentional, sustained giving from parishioners, (2) move parishioners onto parishes' online giving systems, and (3) invite parishioners to consider increased giving to their parish communities. The program highlights how each parish's mission and vision are supported and made possible through the financial sacrifices of its parishioners, and focuses on helping each parish meet its short and mid-term budgetary needs.

The campaign is conducted over an eight-week period and includes homily presentations by the pastor and parish leaders, as well as personalized communication to all registered households in the parish through letters, notecards, thank you cards, and digital outreach.

Goals and Expectations

The parish should set a goal to increase its overall regular offertory income by at least 15% or higher and to increase participation in offertory giving by 10%. The results will depend on:

- The leadership and active participation of pastors and lay leaders. These leaders must be passionate about articulating the parish's vision for itself, and about directly inviting parishioners to participate in that mission through their financial sacrifices.
- The parish leaders' ability to explain the parish's financial situation in a clear and dignified manner so that parishioners understand and take ownership of their parish's real financial need.
- The implementation of electronic giving systems at the parish (including full utilization of digital tools and available social media platforms), and the willingness of parishioners to commit to regular, automatic financial support.

Through the dedicated efforts of the pastor and parish leaders, and a sincere and thorough educational process, each parishioner's commitment in *Beyond Sunday Morning* will culminate in a renewed sense of responsibility for the financial health of the parish and an immediate increase in weekly offertory. In order to sustain increased levels of giving, pastors should actively thank and remind parishioners of their offertory commitments on a regular basis throughout the year, and articulate precisely what the additional funding will allow the parish to accomplish.

II. Program Guidelines

Beyond Sunday Morning consists of three distinct phases that are each integral to its success:

1. Preparation Phase
2. Active Phase
3. Continued Reporting and Parishioner Engagement

Preparation Phase

In order for *Beyond Sunday Morning* to be successful, detailed preparation is needed several weeks prior to the program start date. The majority of the work will take place 2-3 weeks prior to Week 1 of the Active Phase. The preparation phase consists of six priorities:

Bi-Weekly Meetings

The campaign manager and the pastor will meet every other week. These meetings will be used to discuss and prepare appropriate materials, assign action items, and review offertory success-to-date. The meetings will extend throughout the entirety of *Beyond Sunday Morning*. The parish is asked to set aside at least one (1) hour per meeting.

Leadership Recruitment

Recruiting lay leaders who can speak to the needs of the parish will be key to personalizing the case elements for fellow parishioners. This may include members of the Parish Finance Council, teachers, youth and adult program leaders - anyone who can speak compellingly to the importance of the parish's financial health.

Along with having the parish's lay leaders speak during Masses, consider recording a message from these leaders to share virtually. This will ensure that all can receive the message, even if they are not in attendance at Mass.

Preparation of Customized Case for Support

Following thoughtful analysis of the parish's current financial situation, each parish will prepare a brief statement outlining its financial goal(s) that can be achieved through *Beyond Sunday Morning*. This "Case for Support" will be included in each parish's customized letters and all virtual messaging. A compelling case for support will help encourage parishioners to increase their levels of giving.

Drafting of Additional Materials

The parish and the assigned campaign manager may draft additional materials to meet parish specific needs, including but not limited to: bulletin inserts highlighting the case for support, QR codes, or digital content. It is recommended that photography and visuals reflect parish life.

Targeted Proposed Gift Amounts

Each parish will work with campaign managers to segment its parishioner list based on assigned offertory ranges. The key in this process is to determine an average giving amount for each regular contributor, so that they receive a specific offertory range to consider growing toward.

Establishment of Online Giving and Virtual Tools

All parishes involved in *Beyond Sunday Morning* will be urged to make online giving available to their parishioners. Electronic giving programs offer parishioners the opportunity to make automatic deductions from checking accounts and/or give via credit cards.

Active Phase

Once case customization and list segmentation are complete, the process will pivot to focus on implementation. The pastor's role will be to inspire parishioners and to effectively relay information to the community during the active phase. The active phase includes four main components:

(I) Preaching

The pastor will be asked to devote one Sunday towards preaching about the parish vision and inviting parishioners to participate in that vision through their financial support. The campaign manager will offer support to the pastor by providing talking points on the significance of intentional giving. On a separate Sunday, a parish volunteer or member of the parish Finance Council may give an additional presentation on the financial state of the parish.

(II) Pulpit / Livestream Announcements

The pastor should reference *Beyond Sunday Morning* **each week**. The parish administrator and campaign manager will be responsible for updating participation statistics and providing input on how to best present case elements in a compelling way.

(III) Print and Digital Materials

In addition to hearing about the campaign in announcements at Mass, parishioners will also receive print materials, all of which pastors are encouraged to personalize. Campaign Managers will support the parish in tailoring and implementing the following mailings:

1. Pastor Letter following Announcement Weekend with request for participation
2. Pastor Postcard
3. Thank you notecard

The campaign manager will also assist the pastor in leveraging these materials for digital communications, and will advise on consistent messaging across print and digital media.

(IV) Commitment Weekend

During all Masses on Commitment Weekend, parishioners will be invited to put their new offertory commitments in writing. **Expect 35-45% of active parishioners to make decisions by this date.** Another 3-5% will respond through the follow-up process.

Continued Reporting and Parishioner Engagement

Following the parish's Commitment Weekend, the parish and campaign manager will work together on follow up and reporting. These components include:

Data Entry

During the course of Commitment Weekend, parishioners will provide their updated contact information. **Email address, telephone, address, and name changes** will be collected by the parish, and the parish staff should plan to update their parish records with this new information. Updates should also be shared with the campaign manager, who will ensure the archdiocese's records are all also updated accordingly.

Offertory Tracking

Offertory tracking will begin at the start of the campaign and continue through Week 8, placing particular emphasis on the weekends following Commitment Weekend. This is the time when the actual results will be tallied and compared to the previous year's collections. Campaign managers will contact parishes on a weekly basis for offertory and online giving data. At each bi-weekly meeting, the campaign manager will provide a summary of the results to the pastor.

Weekly Bulletin Updates

Following the conclusion of the program in the parish, **regular offertory updates should be provided in the print and online bulletins**. These updates should include the amount given since the last update, and a comparison to the previous year during that same timeframe. The updates should also include the year-to-date percentage increase over last year at the same time. This process will help parishioners understand the impact of their giving.

Annual Financial Reports

Most parishes provide annual reports in the fall. These should be expanded slightly to report on the parish's increased offertory income as the result of *Beyond Sunday Morning*.

Annual Renewal

Pastors should devote one to two Sundays in the following calendar year to providing parishioners an update on offertory giving **to encourage continued support at increased giving levels, invite newly registered families to participate, and offer a focused opportunity to sign up for online giving.**

III. Program Timeline

Beyond Sunday Morning will run October 3 – November 21. Please see the calendar below for a detailed timeline of fundraising activity.

Week of	Activity
October 2-3	Announcement Weekend
October 9-10	Pulpit Announcement #1 <i>Pastor Letter Reaches Homes</i> Digital Outreach
October 16-17	Pulpit Announcement #2 Digital Outreach
October 23-24	Commitment Weekend Digital Outreach
October 30-31	Pulpit Announcement #3 Digital Outreach
November 6-7	Pulpit Announcement #4 Digital Outreach
November 13-14	Pulpit Announcement #5 <i>Pastor Postcard Reaches Homes</i> Digital Outreach
November 20-21	Conclusion Announcement Digital Outreach

Notes on Timeline and Activity

It is important that materials include as much customized information as possible about the parish's needs. All virtual case messaging and both letters will provide the opportunity to highlight parish-specific needs and to share a vision that will inspire parishioners to give. Announcement and Commitment messages should also be adapted to the parish's needs. Pastors are asked to work with their campaign managers to draft and finalize the letters and virtual materials.

IV. Case Preparation

The success of Beyond Sunday Morning is highly dependent upon effectively conveying the parish's vision and needs, and upon inviting parishioners to participate in that vision through their financial support. Common methods of imparting these messages include pulpit announcements, mailings, phone calls, emails, and dedicated homilies.

Additionally, parishes will benefit from leveraging the digital tools they created during COVID-19, which parishioners have to come expect as standard methods of communication: social media, Flocknote, and pre-recorded video messages.

A critical element of the campaign is **case personalization**. Parishioners desire a specific and transparent message that directly addresses their interests and hopes for the parish. Each pastor will work with his campaign manager, parish staff, Finance Council, and lay leaders to craft an engaging case that demonstrates need and will capture the attention of his parishioners. Keep in mind:



EACH PARISH IS UNIQUE

Consider what makes the parish unique when personalizing materials and announcements. Emphasizing the particular charism of the parish can also serve as a way to encourage parishioners to return to Mass in person.



MAKE THE VISION CLEAR

Pastors can increase the efficacy of their efforts by defining a clear message that indicates to parishioners why they should become financial stakeholders in their spiritual community. Once parishioners better understand how their financial sacrifices will be used, and that their sacrifices will be stewarded and well-used by the parish, they will become more inclined to "invest."



ENGAGE MORE ACTIVE GIVERS

This campaign moves the parish away from a standard "transactional" approach for making a gift, to one in which parishioners are encouraged to intentionally consider their giving in light of overall annual income, and to respond prayerfully as an extension of their faith journey.

An Effective Case Statement

A case statement can be simple or complex but it should always demonstrate need. This can be financial (see Examples #1 and #2) or more programmatically based (see Examples #3 and #4).

- (EXAMPLE #1) Our **weekly expenses total \$XX**. With an **average weekly offertory of \$XX**, we are required to rely on our savings whenever there is a deficit.
- (EXAMPLE #2) During COVID-19 our weekly offertory dipped from \$XX per week to \$XX per week. We know many are in financially challenging situations, so please make a contribution only if your financial situation permits. Know that a gift of any size will help support our parish family.
- (EXAMPLE #3; Repair) We wish to replace our A/C unit in time for the summer. Please help us ensure we continue to serve the spiritual needs of our parishioners and provide a welcoming atmosphere.
- (EXAMPLE #4; Ministry) Our Youth Ministry celebrates 20 members. We wish to provide additional resources to help form the hearts and minds of this next generation.

V. Leadership Roles

Effective collaboration between the pastor, parish staff, and campaign manager is necessary for a successful campaign. Roles and responsibilities include:

Pastor / Parochial Vicars

- Provide leadership for *Beyond Sunday Morning* by preaching on the significance of intentional giving and inviting parishioners to consider how God might be calling them to provide additional financial support for the parish
- Continue pulpit announcements throughout the campaign and speak positively to parishioners about its importance for the parish
- Attend and participate in meetings and events related to *Beyond Sunday Morning*
- Review, revise, and approval all physical and digital communication materials
- Recruit lay leaders to speak during and/or after Mass about the campaign or to give a witness reflection on why they support their parish financially

Parish Staff / Administrator

- Provide offertory data to the campaign manager for segmentation of parishioner list
- Provide weekly updates to the campaign manager on collections
- Gather parishioner information to be updated on the CAT list and send to the campaign manager
- Provide support as needed in approving print and digital materials

Campaign Manager

- Manage campaign timeline and provide resources to the pastor and parish staff as needed
- Work with pastor to craft case and prepare public talking points about the campaign
- Support pastor and parish staff in establishing digital tools and finalizing virtual communications
- Analyze and segment parishioner list based on past giving and provide suggested increased ask amount ranges
- Draft or edit additional communications materials as needed
- Work with pastor and lay leaders to approve communications materials
- Attend Announcement and Commitment Weekends when possible