Diocese of Madison

Letter Accompanying the Annual Report to the Parish

Providing a letter that helps explain the annual report to parishioners is a powerful tool that can help encourage greater stewardship. The goal is to help parishioners understand what has happened in the last year in the parish. To do this, the annual report to should combine a parish financial statement with other information on parish giving, highlights of the past year, comments from the pastor and a discussion of parish volunteer efforts, missions and ministries. An example is attached on the following page.

A. Significance

One of the primary reasons Catholics say they do not support their parish is because they do not know or understand how the money is used. A parish annual report should clearly answer that question. It should also provide enough information about the work that is being done in the parish to motivate parishioners to become involved and invested in that work.

B. Timing

The best time to distribute your letter and the parish annual report is right after the fiscal year-end. The combination of the financial needs and accountability that is found in an annual report along with the spiritual call to give which is found in a stewardship message from the letter can be most compelling.

C. Content

Begin by thinking of the information you think good stewards would want to know about the parish they are supporting. Consider including highlights from the last year, facts on envelope usage, revenue from all special events and how it was used, a listing of parish ministries, statistics about the parish, information on planned giving and endowment funds.

D. Communication

When properly written, the letter accompanying the parish annual report can be your most important communication tool of the year. Therefore, you should plan to distribute it as an insert in the church bulletin. Other means of distribution include the parish website or in welcome packets for new parishioners.
Dear Parishioners:

On behalf of our Parish Finance Council, I am pleased to present the St. Joseph Parish Annual Report. This report covers the finances of our time, talent, and treasure between July 1, 20XX and June 30, 20XX.

We are blessed that our parish has many activities throughout the year. In the two pages of this report, you will not only find the financial numbers from our parish operations of the past year, but various other auxiliary groups that relate to the life of our parish. All of these facts and figures help bear witness to the great work that occurs within our parish! It is very clear that there are truly many ways that we use our God-given gifts and talents for the betterment of our community and each other. Since my arrival in October, I have enjoyed meeting you and am very proud to be a member of this community! I am grateful for what you have done in the past and I look forward to the many ways that we will work together in the upcoming years.

Your generous response to the Annual Catholic Appeal along with careful management by the Parish Finance Council of the routine parish running costs enabled us to clear all of our outstanding debt to the Diocesan Assessment. This allowed us to undertake the recent renovations with a clean slate and a projected annual surplus of $100,000. In addition to this, your response to the Church Renovations Campaign has been equally magnificent.

Our beautiful church was opened in 1866 which means that we will be celebrating its 150th Anniversary in 2016. I hope that over the next four years we will be able to do all that is necessary to bring our buildings, our grounds and our parish administration to the highest standards so that we can be justifiably proud of the parish and the church we have inherited from our predecessors in faith. With God’s help, 2016 will be a special year of celebration for our parish and among other plans is the publication of an illustrated history of the church.

In conclusion, I would like to thank you for your loyal and generous support of your parish and your priests down through the years. I would also like to express my thanks to Monsignor George Richardson, Sister Bethany and Sister Fiona for all that they contribute to the life and ministry of our parish. I also thank the Parish Pastoral Council, the Parish Finance Council, the parish staff and the many other groups and individuals who support the parish in various different ways.

The members of the Parish Finance Council, parish staff, and I, welcome any and all questions or comments that you may have. Please do not hesitate to contact us through the parish office at 333.666.5555.

God bless,

signature

Father Jones