

Building Our Family of Faith



2021 Annual Ministry Appeal DIOCESE OF MONTEREY

A Resource Manual for Pastors and Parish AMA Coordinators
Diocese of Monterey
Prepared by: Office of Stewardship and Development

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Introduction

As God's people, rich in faith, cultures and Catholic traditions, we welcome everyone as we gather in the Holy Spirit to celebrate God's love and are sent forth to serve as witnesses to the Good News of Jesus Christ. Mission for the Diocese of Monterey

The Annual Ministry Appeal (AMA) is a pillar for service – a fund that ensures our ability year after year to carry out the mission of the Diocese of Monterey through the supported ministries. The AMA is also a fruitful means of support for individual parish financial concerns through the Parish Share Program – returning to each parish 100% of the funds raised in excess of their diocesan goal. Whether your parish needs additional funds to meet everyday expenses or to grow in capacity or facility, the AMA offers you the opportunity to reach out to your community to secure the funds you need. We encourage you to make the most of this annual event for the benefit of your parish and your diocese!

We appreciate EVERYTHING you do at your parish to fund the Annual Ministry Appeal each year.

The theme of the 2021 AMA is Building Our Family of Faith. It is our sincere desire to continually improve communication with parishioners, demonstrating the vitality of the ministries and the depth of the impact of their giving. The goal for 2021 is \$1 million.

The Office of Development and Stewardship is your guide as you journey through the AMA. We coordinate the entire campaign, cover most of the expenses and processing, and are committed providing parishes with a program that is easy, efficient and effective.

Please read through the manual and feel free to contact our office with any questions. We look forward to continuing our work, and Growing in Faith.

Sincerely,

Office of Stewardship & Development

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AMA "GPS"

Fund-raising is a very rich and beautiful activity. It is a confident, joyful and hope-filled expression of ministry. In ministering to each other, each from the riches that he or she possesses, we work together for the coming of God's kingdom. -Henri Nouwen, J.M. *The Spirituality of Fund-Raising*

TEACH THE IMPORTANCE OF STEWARDSHIP TO YOUR PARISHIONERS Explain what Stewardship is all about! Let your parishioners know that it is "practical spirituality". It is one way that we should all respond to Jesus' call to be His disciples. We should offer to God the first and best portion of all we receive in an intentional, proportionate, and thankful way, as God's Word teaches. Support of the diocesan ministries is as necessary as being a responsible steward to one's parish. Pay it forward with hope, give back with gratitude.

START AS SOON AS POSSIBLE Review the materials outlined in this manual and follow the suggested AMA calendar. Posters should be hung prominently in your church to call attention to the fact that the campaign has begun. By holding the appeal in accordance with the calendar, you give parishioners 8 months to fulfill payment of their gifts – with a few months off for the holidays!

HAVE A PLAN AND BE PREPARED TO PUT THE PLAN INTO ACTION Follow the guidelines in this manual and the AMA calendar. Make sure all staff/volunteers involved with the In-pew or Tabling process understand their role COMPLETELY. Be consistent from Mass to Mass.

UTILIZE CAMPAIGN MATERIALS Posters, brochures, letters, appeal envelopes, single-gift envelopes, progress posters and this manual will be supplied to each parish. USE THEM!

CREATE A POSITIVE IMAGE Speak about and publish positive results and information about the AMA and the many ways it benefits the people of the Diocese. Speak of the importance of giving because we have a need to return a portion of what God has given us to sustain His work in the world.

PROVIDE MOTIVATION When talking about the ministries supported by the AMA, people are more apt to give when they feel a sense of CONNECTION with the areas funded. We suggest explaining how the AMA provides services to the parishes such as helping to prepare future parish priests by educating seminarians, training for our catechists, etc. Seek to offer examples of diocesan services and ministries that relate more closely to your parish.

STRESS PARTICIPATION TO ALL Please stress the point that every household in the Diocese is asked to respond to the AMA. It is important that everyone be encouraged to participate. We continue to gain new donors each year, but we must also work hard to stay engaged with our current donor base - that is our path to growth.

PRAY AND SING FOR SUCCESS Everyone should be encouraged to take a few moments to pray for the success of the AMA; success will strengthen our Diocesan Church in unity and common identity.

RECOGNIZE DONORS AND VOLUNTEERS Always thank those who have given and/or helped conduct the AMA. Graciously thank those who participated for their gifts of time as well as for their financial contribution.

2021 AMA Calendar

September 2020	
September 21 -25	AMA Trainings
October 2020	
October 30	AMA Menu Due
November 2020	
November 15	Pastor Support Letter sent to Parishes for Approval (Only for those participating in the Diocese Pastor Mailing)
December 2020	
December 1	Parish Database for Pastor Mailing Due
December 14 - 18	
January 2021	
January 4 - 8	2021 AMA Materials Delivered to parishes; CID Lists provided to parishes
January 11 -15	Unpack AMA Materials - Confirm quantities, display posters & stage for easy access
January 25	Bishop's AMA Letter mailed
January 30-31	Pastor/Lay Witness announces the opening of AMA; mentions Bishop's AMA Letter mailed to past donors
February 2021	
February 12	Pastor Support Letter mailed
February 13 -14	Pastor/Lay Witness announces the mailing of Pastor Support letter to parishioners
February 17	Ash Wednesday
March through July 2021	Provide regular notes of gratitude and AMA results during mass, in your bulletin and on your website.
August 2021	
August 31	Soft close target to reach goal in Amount Received
September through December 2021	Encourage pledge fulfillment

Parish	Location	Loc#	2021	2020	2019	2018
San Carlos Cathedral	Monterey	301	\$44,500	\$45,000	\$42,400	\$41,000
Carmel Mission Basilica	Carmel	308	\$52,000	\$50,000	\$50,000	\$51,800
Our Lady of Mt. Carmel Church	Carmel Valley	309	\$9,000	\$10,000	\$10,500	\$10,500
Our Lady of Refuge Church	Castroville	310	\$18,900	\$18,900	\$18,900	\$18,000
St. Jude's Church	Marina	319	\$10,700	\$10,300	\$10,300	\$10,000
St. Angela Merici Church	Pacific Grove	327	\$27,200	\$27,300	\$27,800	\$28,300
St. Francis Xavier Church	Seaside	335	\$13,200	\$12,800	\$12,800	\$12,500
St. Theodore's Church	Gonzales	414	\$9,300	\$8,400	\$8,000	\$9,000
Holy Trinity Church	Greenfield	415	\$13,500	\$13,900	\$13,600	\$13,100
Sacred Heart/St. Benedict	Hollister	416	\$40,500	\$41,000	\$41,800	\$40,000
San Antonio Mission de Padua	Jolon	417	\$2,900	\$2,900	\$2,900	\$2,900
St. John the Baptist Church	King City	418	\$15,100	\$14,800	\$15,200	\$15,700
Madonna del Sasso	Salinas	425	\$43,700	\$44,000	\$45,500	\$47,200
Sacred Heart Church	Salinas	426	\$34,000	\$34,400	\$34,400	\$35,000
St. Mary of the Nativity Church	Salinas	427	\$28,800	\$28,600	\$29,300	\$30,000
Old Mission Church	San Juan Bautista	428	\$18,900	\$16,500	\$15,800	\$15,100
Our Lady of Solitude Church	Soledad	436	\$14,900	\$14,500	\$14,300	\$14,500
Immaculate Conception Church	Tres Pinos	437	\$13,400	\$13,300	\$12,900	\$12,800
St. Joseph's Church	Spreckels	442	\$34,000	\$34,600	\$34,900	\$35,800
Christ the King Church	Salinas	451	\$26,200	\$24,200	\$23,600	\$21,900
St. Patrick's Church	Arroyo Grande	503	\$54,800	\$55,000	\$54,000	\$53,700
St. William's Church	Atascadero	504	\$28,300	\$28,400	\$28,200	\$27,500
Santa Rosa Church	Cambria	506	\$13,000	\$13,000	\$12,600	\$12,800
St. Joseph's Church	Cayucos	511	\$12,500	\$12,400	\$11,900	\$11,400
St. Timothy's Church	Morro Bay	520	\$16,900	\$16,900	\$16,900	\$16,500
St. Joseph's Church	Nipomo	521	\$29,500	\$29,000	\$28,400	\$27,800
St. Rose of Lima Church	Paso Robles	523	\$33,300	\$33,900	\$35,700	\$37,500
St. Paul the Apostle Church	Pismo Beach	524	\$25,500	\$25,000	\$25,000	\$26,000
Old Mission Church	San Luis Obispo	529	\$39,500	\$41,200	\$41,700	\$41,900
Nativity of Our Lady Church	San Luis Obispo	530	\$24,500	\$23,600	\$22,600	\$21,200
Old Mission Church	San Miguel	531	\$10,300	\$10,200	\$10,000	\$10,000
Santa Margarita de Cortona	Santa Margarita	534	\$6,300	\$6,300	\$6,500	\$7,200
St. Elizabeth Ann Seton Church	Los Osos	561	\$8,500	\$8,500	\$8,200	\$8,600
Resurrection Church	Aptos	602	\$38,900	\$41,000	\$42,000	\$42,000
St. Michael's Church	Boulder Creek	603	\$5,800	\$5,900	\$5,900	\$5,900
St. Joseph's Church	Capitola	607	\$36,200	\$38,400	\$40,000	\$42,700
St. Vincent de Paul Church	Davenport	612	\$1,500	\$1,500	\$1,000	\$1,000
St. John's Church	Felton	616	\$6,300	\$6,700	\$7,000	\$7,000
Holy Cross Church	Santa Cruz	632	\$21,900	\$23,100	\$24,000	\$24,600
Our Lady Star of the Sea Church	Santa Cruz	633	\$15,300	\$14,600	\$14,000	\$14,200
Our Lady Help of Christians Church	Watsonville	638	\$18,000	\$18,400	\$19,000	\$18,700
Our Lady of the Assumption Church	Watsonville	639	\$19,800	\$19,400	\$19,500	\$19,000
St. Patrick's Church	Watsonville	640	\$26,600	\$26,600	\$26,400	\$25,400
Holy Eucharist Church	Corralitos	641	\$11,300	\$11,200	\$11,000	\$11,400
San Agustin Church	Scotts Valley	643	\$18,600	\$18,400	\$17,600	\$17,200
Christ Child Church	Los Gatos	668	\$6,200	\$6,000	\$6,000	\$6,000

AMA LEADERSHIP: Pastor



Pastors are asked to actively participate in and support all AMA activities. There is no more significant factor in the success of the Annual Ministry Appeal than the enthusiastic support and participation of the pastor, speaking to the value of the AMA from the pulpit and inviting parishioners to engage personally in this diocesan expression of stewardship.

Delegate logistical roles such as coordination and gift processing to qualified parish staff and volunteers to free up time for you to perform your most critical role.

- Select the AMA Menu options that will yield the best results for your parish
- Get comfortable with the In-Pew/Tabling process
- Prepare talking points for all weekends
- Prepare or approve your Pastor Support Letter for mailing
- Be generous with your thank yous for participation

“Parish share (AMA Rebate)” begins when the cash received for gifts from your parishioners meets the parish’s diocesan goal.

AMA LEADERSHIP: Coordinator(s)



Collaborate with the pastor to conduct a successful campaign using the guidelines and equipment provided. You are the AMA cheermeister!

- Follow the AMA Calendar and Resource Manual guidelines to the best of your ability
- Know your parish goal and consider establishing a “family” ask amount
- “Pie in the Sky” goal is 100/100! 100% participation and 100% redemption!
- Assist as needed with the Pastor Support Letter
- Review, edit and schedule Bulletin/Altar Announcements
- Understand the purpose of the AMA, the impact on the broader diocesan community, how your parish benefits from the ministries and the special parish project that will be funded through the AMA
- Get comfortable with the In-Pew/Tabling process and recruit/train volunteers to assist
- Identify key parishioners or yourself, to write and/or deliver the AMA Message
- Stage AMA materials for easy access during appeal weekends – brochures, envelopes, and pens/pencils. Track your inventory and know where additional materials are kept at your parish.
- Plan regular communications with parishioners through all media

AMA LEADERSHIP: Liaison




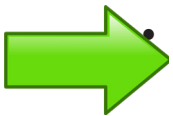
The ownership of the AMA must be held at the parish level. The AMA Liaison is a staff member with full knowledge of the AMA, the AMA process and available as the “go to” contact for the Development Office if the AMA Coordinator is not available. This position works in full collaboration with the pastor, coordinator and report processor.

AMA LEADERSHIP: AMA Report Processor

The AMA Report Processor's role is to process gift envelopes per the procedures outlined in this manual.

Gift Processing Basics

- Process gifts at least once per week to keep the process moving - especially for electronic and multi-payment gifts.
 - Organize envelopes into batches of 30.
-  Scan envelopes for key information: donor name, address, parish to credit, gift amount, number of payments and payment method. ALL electronic gifts require a signature. Credit/debit card payments require a card number and expiration date. Electronic Checking payments require a voided check. If the credit card number is missing digits or there is no expiration date, the gift is considered an EXCEPTION. Read about EXCEPTION gifts below.
- CID#s must be identified/recorded for each gift and can be found in your parish Constituent ID Report (CID), unless you are processing direct mail letter remits, payment remits, or pre-labeled the envelopes, all with pre-coded CID #s. You can record the donor's CID in the designated column on the Parish Report Form (PRF) or on the appeal envelope in the box at the bottom of the envelope. If the donor does not have a CID, please check "NEW".
 - Donor Pays Cash: Keep the cash and deposit it. Place an X in the Parish Check column. Issue one parish check per batch (do not combine parish checks across multiple batches).
 - Donor includes full or partial payment by check: Write in the check details in the boxes at the bottom line of the Gift Information section and leave the check inside the envelope.
 - Electronic Checking Payment: Leave the voided check inside the envelope. Donor should include a signature.
 - Credit/Debit Card Payment: Donor address must be included on the envelope, along with the card number, expiration date, name on the card and the donor signature.
 - Multi-payment gifts - Payments 2-8: Donors making a multi-payment gift can submit payments to the parish office. You can forward the payment to ODS without processing it (just bundle separate from other gifts) or you can process the payment with all other gifts on the PRF. (Refer to Parish Report Form for directions.) Be sure to include the payment remit slip. Blank payment slips can be requested from the ODS.
 - EXCEPTION GIFTS: These gifts are ones with missing information, such as incomplete Credit Card info or missing a signature on the check. Please DO NOT include these gifts in a batch. You can send them to us separately and we will contact the donor to obtain missing information.



Parish Report Form

Box 1: Enter parish name

Box 2: Enter your name

Box 3: Enter parish location number.

Box 4: Enter the next consecutive report number for your parish, i.e, 1, 2, 3.....15

Box 5: Enter the date you are sending in the form/batch

Box 6: Enter a phone number where you can be reached

Use the Appeal Envelope, Direct Mail Remit Form, Pledge Payment Form or Single Gift Envelope for the remaining boxes:

Box 7: Enter the donor's name

Box 8: Place an "x" in this column if the donor paid cash and their gift amount is included in the Parish Check

Box 9: Optional* Enter the donor CID number (or NEW) in this cell OR in the box on the appeal envelope

Box 10: Enter the FULL gift amount OR Payment 2-8 amount

Box 11-11B: Paying By Check Today:

No payment included today; move on to Box 12

Box 11: Payment in Full; enter the check amount and continue to Box 12, Balance should be \$0

Box 11A: Multi Payment Gift; enter the amount of Payment 1, go to Box 12, Balance = Full gift - first payment

Box 11B: Payment 2-8; enter amount of payment 2-8, go to Box 12, Balance should be \$0

Box 12: The balance will be auto-calculated based on the gift amount less the amount paid by check.

When the balance is greater than \$0:

Enter the balance amount in the payment type cell as indicated by the donor. Bill me: enter balance in Statement Box 12A. Credit/Debit Card: enter balance in Charge Card Box 12B, Electronic Checking; enter balance in E-Checking Box 12C. The default payment method, if one is not specified, is Statements. Proceed to the next gift until the batch is complete.


Box 13: Before saving and printing your PRF, go to line 31 of the report and look for the Golden

Message....

Data Entry Correct - You are good to go! If you see Error on Page - Please correct the error until you see "Data Entry Correct" in this box.

Print two copies of your PRF. Retain one copy for your file and submit the second copy with your completed batch to the diocese.

Parish Report Form Reference: 2021 AMA

PARISH NAME		YOUR NAME	LOC NO.	REPORT NO.	DATE	PHONE	Diocese of Monterey				
							2020 AMA V 2.1 				
DONOR NAME	Parish Ck	CID	GIFT AMOUNT OR PAYMENT AMT	PAYING BY CHECK TODAY			BALANCE	ENTER BALANCE IN PREFERRED PAYMENT METHOD			
				PAYING IN FULL	FIRST PAYMENT	PAYMENT 2-8		STATEMENTS	CHARGE CARD	E-CHECKING	
1							\$0.00				
2							\$0.00				
3							\$0.00				
4							\$0.00				
5							\$0.00				
6							\$0.00				
7							\$0.00				
8							\$0.00				
9							\$0.00				
10							\$0.00				
11							\$0.00				
12							\$0.00				
13							\$0.00				
14							\$0.00				
15							\$0.00				
16							\$0.00				
17							\$0.00				
18							\$0.00				
19							\$0.00				
20							\$0.00				
21							\$0.00				
22							\$0.00				
23							\$0.00				
24							\$0.00				
25							\$0.00				
26							\$0.00				
27							\$0.00				
28							\$0.00				
29							\$0.00				
30							\$0.00				
31 DATA ENTRY CORRECT			\$0.00	\$0.00	\$0.00	\$0.00	\$0.00				
FOR DIOCESAN USE ONLY											
			Total Amount Paying in Full	\$0.00	Total Amount of Multi-Payment (PLEDGE) Gifts			\$0.00			
			Total Amount First Payments	\$0.00	Total Amount Statements			\$0.00	Control		
			Total Amount Payments 2-8	\$0.00	Total Amount CC/DC Charge			\$0.00	\$0.00		
			Total Amount of ALL Checks	\$0.00	Total Amount Debit to Checking			\$0.00			

Parish Report Form Sample: 2021 AMA

PARISH NAME		YOUR NAME	LOC NO.	REPORT NO.	DATE	PHONE	Diocese of Monterey			
Serra Room Chapel		Toniie Kline	100	1	1/1/2018	858462812	2019 AMA V1.7			
DONOR NAME	Parish Check	CID	GIFT AMOUNT OR PAYMENT AMT	PAYING BY CHECK TODAY			BALANCE	ENTER BALANCE IN PREFERRED PAYMENT METHOD		
				PAID IN FULL	FIRST PAYMENT	PAYMENT 2-8		STATEMENTS	WIREPOINT CHARGE	DEBIT CHECKING
1	Cheerful Donor	111111	1000	1000			\$0.00			
2	Jolly Donor	222222	100		20		\$140.00	140		
3	Joyful Donor	333333	480		60		\$420.00		420	
4	Merry Donor	444444	300				\$300.00			300
5	Peppy Donor	x 555555	240	240			\$0.00			
6	Sunny Donor	666666	40			40	\$0.00			
7	Chipper Donor	x 777777	500		250		\$250.00	250		
8	Lively Donor	888888	60			60	\$0.00			
9							\$0.00			
10							\$0.00			
11							\$0.00			
12							\$0.00			
13							\$0.00			
14							\$0.00			
15							\$0.00			
16							\$0.00			
17							\$0.00			
18							\$0.00			
19							\$0.00			
20							\$0.00			
21							\$0.00			
22							\$0.00			
23							\$0.00			
24							\$0.00			
25							\$0.00			
26							\$0.00			
27							\$0.00			
28							\$0.00			
29							\$0.00			
30							\$0.00			
31	DATA ENTRY CORRECT		\$2,780.00	\$1,240.00	\$330.00	\$100.00	\$1,110.00			
FOR DIOCESAN USE ONLY			8	2	3	2	4	2	1	1
Total Amount of Initial Pymnts			\$1,240.00	Total Amount of Multi-Payment Gifts			\$1,440.00			
Total Amount Paying in Full			\$330.00	Total Amount Statements			\$660.00	Control		
Total Amount Payments 2-8			\$100.00	Total Amount CC/DC Charge			\$480.00	\$2,780.00		
Total Amount of ALL Checks			\$1,670.00	Total Amount Debit to Checking			\$300.00			

Donor gift details below

- Cheerful Donor: \$1000 Gift. Paid \$1000 by check, no balance.
- Jolly Donor: \$160 Gift. First payment \$20 by check, balance of \$140 to be paid through statements.
- Joyful Donor: \$480 Gift. First payment \$60 by check, balance of \$420 to be charged to credit/debit card.
- Merry Donor: \$300 Gift. No payments enclosed, balance of \$300 to be deducted from checking account.
- Peppy Donor: \$240 Gift. Paid \$240 in cash, no balance. Keep cash, place "x" in Parish Check column & include amount in parish check.
- Sunny Donor: \$40 Payment. Payment 2-8 \$40 by check, no balance. Include payment slip.
- Chipper Donor: \$500 Gift. First payment \$250 in cash, balance of \$250 to be paid through statements. Keep cash, place "x" in Parich Check column & include amount in parish check.
- Lively Donor: \$60 Payment. Payment 2-8 \$60 by check, no balance. Include payment slip.

AMA FUNDED MINISTRIES

Ministry	Director	Phone	Email
Campus Ministry SLO	Fr. Gerry Robinson	805-543-4105	gerrycasj@gmail.com
Campus Ministry UCSC	Fr. Justin Bianchi	831-423-9400	justin.bianchi@hush.com
Catechetical Ministry	Tish Scargill	831-845-2830	TScargill@dioceseofmonterey.org
Catholic Schools Admin	Kimberly Cheng	831-645-2804	kcheng@dioceseofmonterey.org
Divine Worship	Sr. Barbara Long	831-423-4973	Blitmus@aol.com
Family Life & Social Concerns	Dcn Warren Hoy	831-645-2845	whoy@dioceseofmonterey.org
Hispanic Ministry	Socorro Lagarda-Quiroz	831-645-3835	SLagarda-Quiroz@dioceseofmonterey.org
Pastoral Support	Fr. Peter Crivello	831-373-4345	pcrivello@dioceseofmonterey.org
Permanent Diaconate	Dcn David Ford	831-373-1335	dford@dioceseofmonterey.org
Priestly Life	Fr. Mark Stetz	805-927-4816	marksabat@yahoo.com
Protection of Young People	Dcn Warren Hoy	831-645-2845	whoy@dioceseofmonterey.org
Retired Priests Fund	Fr. Paul Valdez	831-384-5434	prvprv007@yahoo.com
Vocations	Fr. Ommar Solis	831-455-2249	frroy@stjchurch.org
Youth & Young Adult Ministry	Fr. Gerson Espinosa	831-373-4345	gespinosa@dioceseofmonterey.org