



Bishop's Annual Appeal

FOR CATHOLIC MINISTRIES



2024 Leadership Manual

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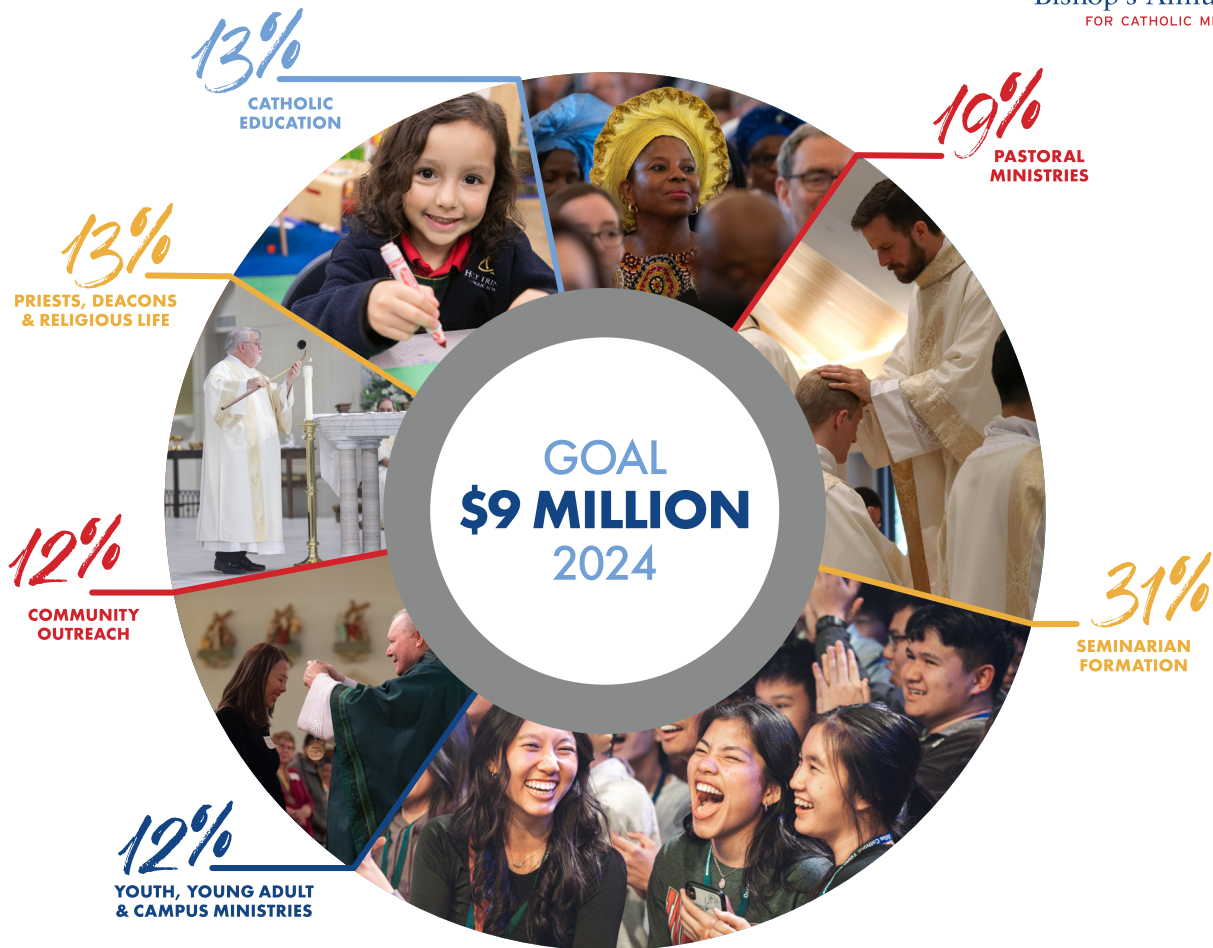


Case for Support

Your gift to the 2024 Bishop's Annual Appeal supports essential programs and ministries including:



Bishop's Annual Appeal
FOR CATHOLIC MINISTRIES



Pastoral Ministries	Priests, Deacons and Religious Life	Community Outreach
Religious Education for Children and Rite of Election of Adults	Ongoing Clergy Formation	Catholic Charities Dallas
Pastoral Cultural Ministry	Preparation of Deacons	Evangelization
Communication Outreach	Support of Religious Women and Men	Saint Raphael Retreat Center
Family Life	Clergy Assistance	Seminarian Formation
Catholic Social Ministry	Retired Priest Care	Vocations Recruitment
Worship	Youth, Young Adult, and Campus Ministries	Seminarian Preparation for Formation
Synod	University Catholic Center at UTD	Holy Trinity Seminary
Pastoral Care (Prison Ministry, Respect Life Ministry)	Youth Ministry	Redemptoris Mater Seminary
Catholic Education	Pastoral Juvenil	
Diocesan High School Scholarships	The 635	
Catholic School Programs	Dallas Catholic Youth Conference	
School Ministry		

Parish Goals

Please note, all 2024 goals were sent via email and USPS in November 2023. If you have not received your goal please contact Kelly Halaszyn at khalaszyn@cathdal.org

Development Office Contacts

Bishop's Annual Appeal

- Email: bishopsappeal@cathdal.org
- Office Phone: 214-528-2540
- Mailing Address:
3725 Blackburn Street
PO Box 190507
Dallas, TX 75219

Kelly Halaszyn

Director of Development

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- Office Phone: 214-379-3178
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Associate Director, Annual Appeal

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Karla Ortiz

Gift Processor

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- Office Phone: 214-379-2864



2024 Materials

The following materials will be mailed to parishes by January 17, 2024. The quantity of each material listed below will be the same as last year unless otherwise coordinated with Charlene Nyhart.

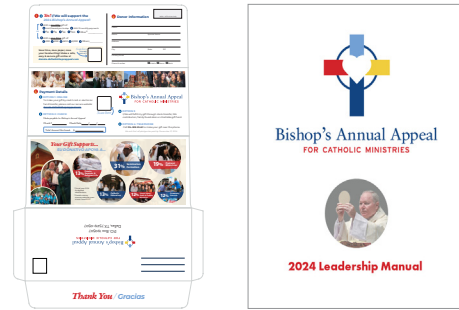
If additional materials are needed please contact our office at 214-528-2540

- **Posters** - English and Spanish
- **In-Pew Envelopes**
- **Tyvek Return Envelopes**

Materials Emailed to Parish

- **Annual Appeal Video**
- **Banner Ads**
- **Scripts for Pastors**

Please visit: dallasbishopsappeal.com/parish-resources



In-Pew Envelopes Leadership Manual



Posters - English and Spanish

2024 Annual Appeal Timeline

November 2023	
11/3 - Friday	2024 Advanced Giving (24AG) Solicitation Direct Mail Sent
December 2023	
12/4 - Monday	2024 AG Email follow-up
January 2024	
1/12 - Friday	10:00 AM Parish Leadership Training
1/16 - Tuesday	Homebound Ministry and Recurring Donor 24AG Pledge Cards mailed
1/17 - Wednesday	All 2024 In-Pew (24PA) materials will be sent to parishes: Pledge envelopes, Parish Leadership Manuals, and Tyvek return envelopes
1/20-21 - Saturday and Sunday	Advance Notice Weekend
Week of January 22	Send email reminder of commitment weekend to Parishes Flocknote message with BAA24 Video from Office of the Bishop 2023 Tax Letters Mailed to ALL Donors
1/27-28 - Saturday and Sunday	2024 Commitment Weekend (24PA)
February and March 2024	
02/05 – 03/29	Gift Processing for 24PA
April 2024	
Week of April 20	2024 Follow-Up (24 FM) Solicitation Direct Mail Sent

Best Practices for Delivery of Appeal Communications/Presentations

An effective presentation can contribute greatly to the success of a new program or the launch of a campaign such as the **2024 Bishop's Annual Appeal for Catholic Ministries**. It is an opportunity to shed light and share timely information about our Church's ministries and services to our faith communities, to relay updates or stories or offer an inspiring message, to generate parish community support, and to acquire new donors or volunteers.

As you prepare to present information about the 2024 Bishop's Annual Appeal to your parish community, below are tips that may be useful in delivering your presentation:

- 1. Prepare ahead.** Review materials, videos or resources that will be shared and practice the presentation in advance. Ensure any technical aspects are set up prior to your in-parish presentation.
- 2. Know your audience.** Adapt the presentation for your parish community. Personalize the request to your listeners and those with whom you have a rapport, so it resonates.
- 3. Know and repeat key messages.** Before you present, review, and understand key talking points and repeat them during the presentation. This helps to ensure that your audience hears the points, realizes their relevance, and processes the information.
- 4. Be specific about why we're asking.** Although many people generally understand that this past year has been difficult for individuals, families, organizations, and the economy, they may not understand it in concrete terms. Give examples of how the pandemic has impacted the Diocese (decline in tithing, lower school enrollments, the financial impact on tuition-paying parents, strain on people's ability to donate, etc.). Make the situation real and specific for the listener.
- 5. Be specific about what's needed.** The Bishop's Annual Appeal is integral to the mission and services of the Diocese of Dallas. Providing day-to-day assistance to those among us with the greatest needs, training for seminarians, for youth in our Catholic schools and religious education programs, the Bishop's Annual Appeal ensures the funding necessary so that these programs may continue to serve thousands throughout our Diocese. As in the past, this year's efforts will create new opportunities and hopefully expand services for those living and working within the nine counties in the Diocese.
- 6. Be brief and succinct.** This is important not only in written communications but also for presentations from the pulpit, etc. A clear, direct request, delivered with warmth and sincerity, will typically be more well-received than an uncomfortably long presentation.
- 7. Be personable.** At the end of the day, you are asking for a donation from a person. Any pitch, whether via snail mail, e-mail or in person, individually or to a group should account for that. Strive for a tone of warmth, openness, friendliness, and honesty. Also, when speaking to past donors, make sure to thank them for their previous support.
- 8. Convey enthusiasm.** Demonstrate the importance of the cause! Passion for a topic draws in people; talking without enthusiasm can deplete energy in a room and eclipse a message. Communicate in an upbeat fashion to engage the audience.
- 9. End with a call to action.** Regardless of how the message is delivered, end with a very clear call-to-action on how to donate, whether it be a basket at the back of the church, a secure online link, a phone number to call, or an enclosed envelope. Make it as easy as possible for the donor to give.
- 10. Express appreciation.** Thank the audience for their understanding and support.

If appropriate leave time for questions at the conclusion of your presentation or offer to be available at a later time for questions.

Commitment Weekend: January 27th – 28th, 2024

Steps to ensure a successful Kickoff Weekend

1. Display Annual Appeal posters at the entrance of your parish
2. Include Bulletin Announcement prior and on launch of the Appeal
3. Include Annual Appeal Materials at the back of your parish: In-Pew Brochures

Steps for a successful collection:

1. Please place in-pew cards in an area easily accessible to parishioners, i.e. pews, vestibule, etc. Ensure that ushers refill these spots with in-pew cards before each Mass.
2. Conduct the in-pew after the homily. Please do not leave the talk for the end as some people may have to leave Mass early
3. Your message should be personalized and engaging. The more effectively you connect the Appeal with a message that will resonate with your parishioners, the more likely they will respond. Lay witness presentations can be used to give firsthand stewardship experiences and explain the importance of the programs funded by the appeal. This designated weekend also educates unregistered churchgoers, who have not received the Bishop's mailing about the Annual Appeal.

Guide Parishioners through Gift/Pledge Process

1. Parishioners may give via the in-pew cards provided to the parish. Donors may make a one-time gift or a pledge (for which they will receive monthly reminder statements). In-pew cards should be collected by the parish and sent to the Diocese.
2. Parishioners are encouraged to give online at donate.dallasbishopsappeal.com. There they may select to make a gift or pledge, as well as designate their parish.
3. If you are wishing to make a gift via appreciated assets, IRA contribution, family foundation, charitable gift/ donor-advised fund, or another non-traditional method of giving contact us to assist us in processing your request. Our Donor Services team can be directly reached at 214-528-2540 or Bishopsappeal@cathdal.org

Checklist

BEFORE MASS:

- Confirm that Prayers of the Faithful are printed and ready for Mass.
- Place sufficient pledge envelopes and pencils in each pew.

AFTER THE HOMILY:

- Briefly thank all who have already participated in the appeal and then ask parishioners to fill out a pledge located in their pew, if they have not already. Then invite them to include the pledge envelope in the collection basket.
- Prayers of the Faithful.

Please see page 8 for examples.



Pastor/Parish Resources

Please include Appeal Progress Updates regularly in your parish bulletin to encourage participation.

Annual Appeal Progress

2024 Bishop's Annual Appeal

The 2024 Bishop's Annual Appeal is well underway. We have **\$1.6 million** already pledged as of December 1st, 2023. This is approximately **17%** of our goal of **\$9 million**. The outpouring of support from many parishioners like you helps sustain the important ministries across the Diocese of Dallas.

Thank you for your prayers and support.

Prayers of the Faithful

Please feel free to use any one of these prayers and to modify, if necessary.

- That we may prayerfully consider how we can best use our financial and spiritual resources to further the mission of Jesus Christ, not only in our parish but throughout our diocese.
- That we may respond generously to the Bishop's Annual Appeal for Catholic Ministries as faithful stewards of the gifts that God has entrusted to us.
- That we use our God-given resources of time, talent, and treasure to bring others into a profound and abiding relationship with Jesus and His Church.
- In thanksgiving for all those who support the work of the Church through the Bishop's Annual Appeal

Collection Weekend

2024 Bishop's Annual Appeal

This upcoming weekend will be Collection Weekend at our parish. (Your Parish Name) has received \$(Pledge Amount) in pledges. Thank you to those parishioners who have already made their gift to the 2024 Annual Appeal.

Will you join your fellow parishioners in supporting this effort that strengthens many important programs and ministries across the Diocese of Dallas?

Our goal, \$(Your Goal Amount), can only be achieved through YOUR generosity!

If you have not yet made a gift, there will be pledge forms available in the pew and in the back of church, or you can visit: donate.dallasbishopsappeal.com.

Your gift will truly make a difference. Thank you for your prayers and support.

DURING THE HOMILY:

- Please preach on stewardship and speak to the impact of the Bishop's Annual Appeal has in sustaining the shared Catholic ministries of the Diocese of Dallas.
- Helps more than 280,000 individuals across the Metroplex by providing meals for families in need, serving low-income senior citizens, and helping the unemployed with career coaching.
- Supports youth, young adults, and campus ministry initiatives such as the Dallas Catholic Youth Conference, The 635, and the University Catholic Center at The University of Texas at Dallas community.
- Supports Catholic education for more than 13,800 students attending 26 diocesan elementary schools and three diocesan high schools.
- Assists in preparing a new generation of diocesan priests. Today, more than 64 seminarians are enrolled at Holy Trinity and Redemptoris Mater seminaries, and the proceeds raised ensure all men who are considering a life of priestly ministry have a place to encourage their discernment.
- Completely funds diaconate formation and supports ongoing priestly formation.
- Provides ongoing catechetical training for leaders in faith formation at the parish level, including Marriage and Family Life.
- Provided last year over 1000 bibles and rosaries for the men and women in our prison system while also providing pastoral and spiritual outreach services to the incarcerated and their families.
- Supports 6 chaplains serving 12+ hospitals throughout the Diocese.



Goal Met

2023 Bishop's Annual Catholic Appeal

Thank you to all those who have helped our parish, (Parish Name), reach our 2023 Bishop's Annual Appeal goal of \$(Goal Amount). We have received \$(Pledge Amount) in pledges from (Number of families) families and have achieved approximately %(Percent Amount) of our goal.

Please be sure to honor your pledges.

If you have yet to give, please pick up a pledge form at the back of the church or visit: dallasbishopsappeal.com/donate.

Thank you for your prayers and support. Your generosity is greatly appreciated!

Reports

Gift reports will be automatically sent out within the first week of each month. Reports will include the following information:

Goal • Total Pledged • Total Collected
Pledge Balance • Total Donors

Please contact Aja Rose Tennyson at atennyson@cathdal.org for any additional questions.



Parish Leadership Roles

Pastor

The Pastor provides leadership, expertise, direction, and oversight to the appeal, and is essential to the success of the BAA at the parish.

- Introduces and share the link to the video message during appeal weekend and instructs other celebrants to do the same
- Makes personal gifts during In-Pew solicitation - The personal endorsement through participation is important.
- Instructs and assures that the methods to conduct the campaign are fully implemented.

Pastor Follow-Up Techniques

- However possible, each parish is encouraged to conduct its own follow-up. Annual Appeal statistics prove that a letter, visit, or call from a member of the parish, especially the pastor, is more effective than the follow-up conducted by the Development Office.
- Pastors are encouraged to send out at least 1 Follow-Up letter to parishioners with regard to the Annual Appeal. The Development Office is available for consultation and support as needed.
- Please note these pastor Follow-Up letters may be sent out by our office at no cost to the parish. You are encouraged to create a personalized and engaging message to your parishioners. The more effectively you connect the Appeal with a message that will resonate with your parishioners, the more likely they will respond.

Method of Payments

There are many ways to make a gift in support of the Diocese of Dallas.

If you have any questions regarding your gift, please reach out to our Donor Services team at: 214-528-2540 or bishopsappeal@cathdal.org

Credit Card

To process a one-time gift or set up a pledge and pay with a credit card, please visit: donate.dallasbishopsappeal.com

Check

One-time and/or pledge payments by check can be made payable to the Bishop's Annual Appeal and be mailed to as follows for processing:

Bishop's Annual Appeal
3725 Blackburn Street
PO Box 190507
Dallas, TX 75219

Gifts as Qualified Charitable Distributions (QCD) from an IRA

If you are over age 70½, you can donate up to \$100,000 tax-free from your traditional IRA. The deadline for receipt of a distribution is December 31 of the calendar year. Because of the high volume of year-end gifts, you are encouraged to contact your IRA administrator as soon as possible to allow enough time for them to issue your gift before December 31st. Distributions by check must be dated and have a postmark no later than December 31st and wire transfers must be received by December 31st. Please request that your administrator reference your name and address with the check or wire transfer.

Catholic Community Appeal, Inc. (dba Bishop's Annual Appeal for Catholic Ministries)

EIN: 75-2679650
3725 Blackburn Street
PO Box 190507
Dallas, TX 75219

Wire Instructions:

Frost Bank
ABA/Routing # 114000093
Account # 980084891

Gifts of Stock

The Diocese will facilitate your gift of appreciated securities to the Catholic Community Appeal (dba Bishop's Annual Appeal for Catholic Ministries). If you wish to make a gift of stock, please follow these instructions to be sure that your gift is received and properly credited. Please note: Failure to notify our office of the name and number of shares that you will be transferring could prevent timely sale and acknowledgment.

Please e-mail Barry Hanner, Sr. Director of Financial Services for the Diocese of Dallas, at bhanner@cathdal.org when the transfer is initiated so the broker can be alerted to accept the stocks and we are able to acknowledge your gift properly and appropriately credit your gift. In this e-mail, the donor should provide information about the following:

- Donor's name and address (for appropriate charitable contribution documentation back to the donor)
- Quantity and name(s) of the stock
- Identify the purpose of your donation

It is also helpful to have the name of the brokerage house and the name and telephone number of the person that we can contact regarding the gift should there be any problems with a transfer.

Securities held by a broker may be delivered by wire transfer through the Depository Trust Company (DTC) to the Diocese's brokerage account. **PLEASE BE SURE THE CORRECT ACCOUNT NUMBER AND DTC NUMBER IS ON THE TRANSFER TO AVOID ANY TRANSFER PROBLEMS.** Instructions should be given as follows:

- Brokerage: Merrill Lynch
- Contact: Lisa McAdam
- Phone: 214-969-2330
- DTC #: 8862
- Account #: 542-04H98
- Account Name: Catholic Community Appeal, Inc.

Gift from a Donor Advised Fund

Catholic Community Appeal, Inc. (dba Bishop's Annual Appeal for Catholic Ministries)

EIN: 75-2679650
3725 Blackburn Street
PO Box 190507
Dallas, TX 75219

Wire Instructions

Frost Bank
ABA/Routing # 114000093
Account # 980084891

All donations should be made payable to the Bishop's Annual Appeal. All payments are contributions to Catholic Community Appeal, Inc. (dba Bishop's Annual Appeal), a Texas non-profit corporation that is tax-exempt under section 501(c)(3) of the U.S. Internal Revenue Code and a public charity under sections 170(b)(1)(A)(vi) and 509(a)(1) of the Code. Contributions are deductible to the maximum extent permitted by section 170(b) of the Code. EIN: 75-2679650

FAQ

1. Who benefits from the Bishop's Annual Appeal?

Every parish and all people within them benefit from the Bishop's Annual Catholic Appeal, as well as those who turn to the Diocese for charitable and spiritual assistance.

2. What is the goal of the Annual Appeal?

The goal of the 2024 Bishop's Annual Appeal is \$9 million, however, the needs of the Diocese far exceed \$12 million. It will be to the benefit of the ministries that are supported by the Bishop's Annual Appeal to be as successful as possible.

3. How can I make a gift to the Annual Appeal?

- Donate online at: donate.dallasbishopsappeal.com
- Make a gift over the phone at 214-528-2540
- Fill out an in-pew card at your parish
- Complete and return the pledge card you received in the mail
- Gifts of stock, IRA distributions, bequests, and charitable annuities can be coordinated by contacting Kelly Halaszyn at 214-528-2540 or khalaszyn@cathdal.org

4. What payments methods can I use to make a gift?

- Cash, check, money order, credit card, or electronic transfer from your bank account
- Credit, Debit card or bank draft can be made by visiting dallasbishopsappeal.com
- Scan the QR Code with the camera of your phone on all available Bishop's Annual Appeal materials



5. Where should they send their pledge/gift?

Your check should be made payable to:

Bishop's Annual Appeal
3725 Blackburn Street
P.O. Box 190507
Dallas, Texas 75219

6. Can a donor make a matching gift?

Yes! If your gift is eligible, simply print out or request a matching gift form from your employer, and send it, completed and signed, along with your gift to:

Bishop's Annual Appeal
3725 Blackburn Street
P.O. Box 190507
Dallas, Texas 75219

7. Can a donor make an IRA charitable gift?

Please see page 10 for detailed instructions.

8. How can I learn more or make a Planned Gift?

Contact Kelly Halaszyn at 214-379-3178 or khalaszyn@cathdal.org

9. Can a donor make a stock gift?

Please see page 10 for detailed instructions.



Bishop's Annual Appeal
FOR CATHOLIC MINISTRIES

“ I ask for your participation and to consider being part of the good work we do in the Diocese of Dallas. ”

Bishop Edward J. Burns