

# **Basic Outline of a Parish Campaign**

Office of Stewardship Development  
Diocese of Rockford

## **What you need to begin:**

- Case Statement Worthy of Support
- Defined Group of Constituents
- Solid Leadership
- Plan of Action

## **What you need to proceed:**

A phased plan of action as follows:

Phase I:	Planning or Feasibility Study Organization Communications
Phase II:	Advanced Gifts Solicitation Worker Recruitment
Phase III:	The Campaign General Phase
Phase IV:	Follow-up

## **What you need to succeed:**

A commitment to follow through on a plan.

Components of Parish Capital Campaign  
Office of Stewardship Development  
Diocese of Rockford

- I. Pre-Case Organization
- II. Case Statement
- III. Feasibility Study
- IV. Chart of Givers
- V. Post Case Phase – Organizational Needs
- VI. Major and Advanced Gift Phases
- VII. Special and General Gift Phases
- VIII. Follow-up and Acknowledgement

# Pre-Case Organization

## Perspective

As any activity in the parish this project should not just be about brick & mortar or fund raising, but also as an opportunity to:

- ❖ deepen the faith commitment of the members - an opportunity to put God and Jesus' mission first in life;
- ❖ build church - how do we as a community work together to plan, pay for, build and use this proposed facility
- ❖ deepen our sense of stewardship- how do we appreciate the past members of the parish who gave us what we have today; how do we express our present responsibility to give our time, talent, treasure for today's mission; how do we plan for our children and the next generation of parishioners;
- ❖ allow the healing power of Jesus to be alive and to touch old wounds and hurts of some members of the parish.

## Preliminary Study Committee

- ❖ develop a written proposal that defines the project and its rationale
- ❖ dialogue with diocesan administration for approval procedures (refer to the Fourth Synod – Diocese of Rockford 2002 document in Appendix 10)
- ❖ select Publicity and Promotions Committee (see task list below)
  - begin formal consultations with parish membership: series of events scheduled at the beginning of planning, after preliminary drawings, town meeting, questionnaire, focus groups of specific segments
- ❖ if the project calls for an architect: interview, choose an architect and execute preliminary drawings and plans
- ❖ form Fund Raising committee - overall chairman and committee chairs
  - consult with Stewardship Development Office of the Diocese - Dave Hougan
  - decide to hire professional fund raising counsel or do it yourself (see “To Hire or Not to Hire Fund Raising Counsel” document)

- ❖ consult with the Parish Pastoral and Finance Councils and seek formal approval for the project from the Bishop through the Diocesan Building Commission
- ❖ organizes Building Committee (see task list below)

## **Publicity and Promotions Committee**

- ✓ uses written proposal of need for programming and space as "case statement"
- ✓ create interest in the community for project by regularly communicating with the community about the progress as it moves through the stages.
  - bulletin; newsletter
- ✓ organizes the official functions of the plan:
  - consultation and planning phases
  - solicitation phases
  - final blessing/dedication event;
- ✓ helps to develop brochures, posters, thank you cards etc for solicitation
- ✓ case statement includes direct statement that gifts to this appeal must in addition to their current offertory gift and pledge to Diocese.

## **Fund Raising Committee**

- ✓ helps decide on how to approach overall fund raising efforts
- ✓ helps make decision on whether to hire fund raising counsel or to proceed with local campaign (see "Should We Hire a Professional Fund Raiser?" document)
- ✓ works with publicity and promotions committee in developing the written "case statement"
- ✓ works through a plan to provide local oversight of fund raising and collection of pledges

## **Building Committee**

- ✓ Approve final plans and specifications; authorize bid letting;
- ✓ Monitor progress of project with contractor; execute change orders
- ✓ Authorizes final acceptance of completed job.

# Case Statement

## Case Statement – What is it?

“The Case Statement is the one definitive piece of the whole campaign. It tells all that needs to be told, answers all the important questions, reviews the arguments for support, explains the proposed plan for raising the money, and shows how gifts may be made, and who are the people who vouch for the projects, and who will give it leadership and direction.” **Harold Seymour**

- A written presentation of the primary elements of a significant new program, need or initiative of the parish
- It provides a rationale and basis justifying the need for the parish to embark upon a major fund raising program.
- It gives all the reasons why the prospective donors might want to invest in the project.

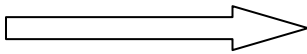
## Case Statement – What does it do?

- Helps staff and leadership to agree on needs
- Energizes and inspires the organization to act
- Announces a fund raising effort
- Engages ownership and direction for volunteers
- Provides a basis for creating a theme statement and marketing pieces

## Case Statement – Getting Started

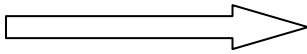
- 1) Collect information about the parish and its long range plans
  - Mission and Vision Statement
  - Past Campaign Materials and Reports
- 2) Consult with leadership groups, commissions, staff and potential donors
- 3) Answer these questions to give the desired information

**Who are we?**



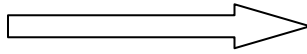
*Background and historical perspective*

**Where are we going?**



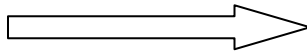
*The future vision for the parish*

**How are we going to get there?**



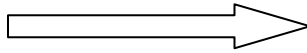
*The challenges that must be met*

**When we get there, what are we going to do that we are not doing right now?**



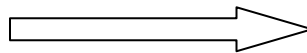
*Impact on parish life and more importantly on parishioner needs*

**How do we hold ourselves accountable?**



*Goals and Objectives*

**How can the community help to get us all there?**



*Necessary human and financial resources*

## **Writing the Case Statement – Introduction**

- 1) Provide a brief history of the parish
- 2) Describe what is distinctive about the parish
- 3) Describe your current ministries and programs and how these dramatically impact peoples' lives.
- 4) Emphasize the teachings and practices of stewardship
- 5) Describe how you have arrived at this point of this project
- 6) Demonstrate sensitivity to the current conditions: economic, historic, etc

## **Writing the Case Statement – Body**

- 1) Describe your goals
- 2) Describe each specific component of each goal
- 3) Demonstrate that these goals and objectives fit into an overall plan
- 4) Explain how accomplishing this project will enhance parish life
- 5) Cite the need to give sacrificially – beyond ordinary giving to parish and Diocesan Stewardship
- 6) Create a sense of urgency and importance
- 7) Explain how funds will be used
- 8) As specifically as possible, inform about the costs of each major item in the Case – try to break out costs

## **Writing the Case – Call to Action**

Inform members about the:

- Campaign Schedule
- Solicitation Method – person to person – door to door
- Need for volunteers and financial commitments from every member

## **Further Ideas**

- 1) During the process of writing, be prepared to do numerous drafts
- 2) Test the Case with a Feasibility Study
- 3) Define the date and how the final approval of the Case will occur
- 4) Publicize the Final Approved Text to the parish
- 5) If not already done, seek official diocesan approval from the Bishop through the Diocesan Building Commission

# Feasibility Study

## Feasibility Study – Purpose:

- 1) To gather honest opinions
  - Project – its strengths and weaknesses, problems
  - Mood of the parish
  - Awareness and receptivity to the project
  - Initial giving level of key individuals and volunteer support
  - Recommendations for major gifts and leadership
- 2) To set a financial goal
- 3) To identify leadership and strong supporters

## Potential Questions for Feasibility Study

- How familiar are you with the parish?
- Has the parish changed in the last ten years?
- What is your reaction to this change?
- How do you view the overall image of the parish?
- How well does the Parish accomplish its Mission?
- Have you read the preliminary Case statement describing the project under consideration?
- On a scale of 1-4 with 1 being the lowest how supportive are you of the goals of the project?
- What is the most appealing aspect of the project?
- Think of your 3 closest friends in the parish. How do you think they are responding to the project and the proposed fund-raiser?
- What advice do you want to give to the parish leaders?
- Do you think it is possible to raise \$? in this Campaign?
- If not, how much could be raised over a three to five period?
- Would you make a gift to the Campaign?
- If so, at what level? (A gift chart would be presented)
- Do you know of individuals who might be capable of giving a significant gift to this campaign?
- Who would be good leaders for this campaign?
- Would you volunteer? In what capacity?

# Chart of Givers

## Chart of Givers

After the Feasibility Study provides a preliminary financial goal from the input of leaders, top leadership develops a giving chart in a confidential environment that strives to achieve:

- A. List of Major Donor Prospects – Individuals who have the financial capacity and willingness to pledge the lead gifts to the Campaign.

One Scenario could be if goal =	\$2 million:
10% of goal level	\$200,000
7.5%	\$150,000
5%	\$100,000
2.5%	\$50,000
1.25%	\$25,000

- B. Identify Advanced Gift Prospects as those who make up the top 25% givers of the parish and who will be asked to consider pledging:

- \$20,000
- \$15,000
- \$10,000
- \$5,000

- C. Identify Special Gift Donors – those in the parish who contribute in a range from \$50 to the lower limit of the Advanced Gift Phase – Asked to pledge \$3,000

- D. Identify General Gift Donors – those whose gifts to the parish are below the Special Gift range – Asked to pledge \$1,000

# Post Case Phase – Organizational Needs

## Post Case Phase – Organizational

- 1) Create role descriptions for leaders
- 2) Recruit and Orient Campaign Leadership
  - Campaign Chairperson(s), if appropriate, Honorary Chairperson(s)
  - Major Gift Chairperson(s) could also be Advanced Gift Chairperson(s)
  - Special Gift Chairperson(s) could also be General Phase Chairperson(s)
    - area leaders one per 50-60 households
  - Publicity and Materials Development Chairperson (Marketing)
  - Campaign Secretary
- 3) Define campaign schedule by phases (avoid Diocesan appeal)
- 4) Develop gift charts – segment the parish into Major, Advanced, Special and General and prepare for variety of gifts, pledges, stock, mutual funds, planned gifts and memorial opportunities
- 5) Create Campaign materials: brochures, pledges cards – including Campaign theme and graphic imagery
- 6) Recruitment of volunteers for Major and Advanced Gift Phases
- 7) Develop training package and conduct training of these volunteers
- 8) Set up PDS program to accept pledges and develop redemption materials: monthly, quarterly, annual payment schedules, instructions for non-cash gifts, print special envelopes, develop special billing from parish if necessary
- 9) Write letters: Announcement of each phase, Acknowledgement letters, follow-up to non respondents
- 10) Develop a post campaign acknowledgement plan

# Major and Advanced Gift Phase

## **Major and Advanced Gift Phase – Quiet Phase – Objective 75% of goal**

- Request and secure commitments from Campaign leaders, parish staff
- Train volunteers to solicit (they pledge first)
- Make assignments to volunteers
- Send out letter to prospects about upcoming visit
- Solicit major gift prospects
  - Personal visits
  - Special meeting or event
- Conduct report meetings
- Monitor progress of solicitors
- Prepare schedule, training materials and prospect lists for next phase(s)
- Recruit Area Captains and volunteers for each area
- Prepare for Public Announcement of Results of Major and Advanced Gift Phase
- Record pledges, send out redemption mailers and thank you letters promptly.

# Special and General Gift Phase

## Special and General Phase

- Complete solicitation of all Major and Advanced gift prospects
  
- General phase methods
  - ❖ Door to door:
    - ✓ Divide parish geographically in sections by approximately 50 families in each section
    - ✓ select captain for each section; captain recruits enough individuals in their own section so that each person visits 5 to 10 families in their home.
    - ✓ organize in home visitor training session - visitors make their pledge first.
    - ✓ PR committee has been educating about project
    - ✓ parish is informed by mail that visitors will be coming within the next few weeks.
    - ✓ captains meet weekly (three times) to turn in their workers' reports
    - ✓ PR committee has some form of on-going reporting means to parish
  
  - ❖ In pew method
    - ✓ weekend 1 - pastor defines the project in terms of faith and mission
    - ✓ between weekend 1 & 2 - parish meeting for leadership people;
      - advanced gifts from leaders; witnesses
    - ✓ weekend 2 - lay people present their witness and ask for a minimum gift
    - ✓ between weekend 2 & 3 people receive mailing - brochure
    - ✓ weekend 3 - Commitment Sunday people fill in pledge card
    - ✓ weekend 4 - announce results - clean up weekend "in pew" again
    - ✓ after weekend 4 - thank you to those giving; letter, brochure, pledge card return envelope for non-respondents asking them for answer in 10 days
    - ✓ weekend 6 - announce final results - celebrate
  
  - ❖ Direct mail
    - ✓ Some parishes mail pledge cards to all members at the beginning or to non-respondents as a final follow-up

- Hold a Kick-off event
  
- Train area workers
  
- Make assignments for solicitation
  - special phase prospects
  - general phase prospects
  
- Send out letter from pastor and chair about upcoming visit
  
- Conduct Report Meeting
  
- Monitor progress of solicitations and follow-up with non reporters
  
- Make regular updated progress reports to the parish
  
- Prepare for Final Commitment Weekend – in- church sign up
  
- Record pledges, send redemption mailers, thank you letter promptly

# Follow-up and Acknowledgement

## **Follow- up**

- Do a final report to the Parish
- Create a follow- up strategy for non-respondents
- Develop a schedule for regular reports to the parish about accomplishing Case Items – debt paid – repairs made – pledges redeemed
- Follow through on acknowledgement plan
- Celebrate – Campaign leaders need to be thanked.