

# 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