



HOW TO ENLIST A FOLLOW-UP TEAM

The ultimate size of the Follow-Up Team is your decision. The best and most successful teams are usually lean. Additional volunteers can always be enlisted for specific tasks as the need arises.

Enlist parishioners to give focus to the primary objectives of the program. (A worksheet is provided on the following page for you to list possible candidates for each category.) After finalizing your enlistment decisions, **use an Involvement Form to list the names of the people you have enlisted for the Follow-Up Team. Give a copy of the list to the Involvement Leader(s).**

1. COMMUNICATION

Select *one* or *two* parishioners who can help with the development of printed materials, articles, and letters to be used in follow-up.

Those who have been enlisted to help in the Print Communications Team of the capital stewardship program may be good prospects for this position.

2. MONITORING COMMITMENTS

If someone other than the Follow-Up Leader(s) (*e.g.*, business manager, financial secretary, parish treasurer, etc.) will be handling the data entry/bookkeeping procedures, that person should be a part of the team.

3. NEWCOMER ENLISTMENT

This will probably be the largest group on the team (4-6). Enlist people who are strong in people skills. They will be calling, hosting, and perhaps visiting newly registered parishioners. They should be good project managers and dependable.

4. In addition to these functional positions, include the following:

- ☐ The Pastor
- ☐ The Campaign Chair (s)

NOTE: *You should also consider including the Finance or Stewardship Committee chairperson, the chairperson of the Building Committee, and/or any other persons who may need to be in the information loop as it relates to campaign income. These individuals may not need to be involved in planning and implementation, but should be kept apprised of follow-up activities and results.*

Follow-Up Resource Guide



Copyright © 2008 by O'Meara, Ferguson, Whelan, and Conway, LLC
All rights reserved

Table of Contents

Introduction	iii
Follow-Up Planning . . . Objectives.....	2
Follow-Up Planning . . . Team Meetings	6
Follow-Up Planning . . . Develop a Three-Year Calendar	8
Follow-Up Planning . . . Presentation of Follow-Up Plan to the Leadership Team	12
Follow-Up Planning . . . Resources	15
<i>Follow-Up Enlistment of New Parishioners With Information Visits.....</i>	<i>16</i>
Suggested Calendar for Enlistment of New Parishioners	17
Calendar of Responsibilities for Enlistment of New Parishioners	18
Guide for Follow-Up Enlistment of New Parishioners	19
Resource Materials.....	22
<i>Follow-Up Enlistment of New Parishioners Without Information Visits</i>	<i>31</i>
Suggested Calendar for Enlistment Event for New Parishioners.....	32
Calendar of Responsibilities for Enlistment Event for New Parishioners	33
Guide for Follow-up Enlistment of New Parishioners.....	34
<i>Quarterly Points of Emphasis.....</i>	<i>43</i>
<i>Model Letters</i>	<i>48</i>
<i>Bulletin Suggestions</i>	<i>63</i>
<i>Advisory Council</i>	<i>69</i>
<i>Ideas</i>	<i>72</i>
Samples: Follow-Up Report Forms	77
Samples: Block Calendar.....	84



Introduction

Your assignment as Follow-Up Leader is to develop, implement, and manage a three-year program of follow-up.

The information in this supplement to your Leader's guide is designed to help you in the development of that plan.

The follow-up program should have three principal objectives:

1. To keep the capital stewardship campaign and the project for which capital is being raised highly visible, so as to stimulate the giving of those who make commitments.
2. To monitor giving as it relates to income projections.
3. To inform new parishioners of the campaign and offer them the opportunity to participate.

As you begin to develop a three-year follow-up plan, a calendar, and a subsequent proposal to the Leadership Team, follow the steps in this supplement. This is your road map to a successful plan for follow-up.



Follow-Up Planning . . .

Objectives



Follow-Up Planning . . . Objectives

Ongoing Promotion

One of the primary responsibilities of the Follow-Up Team is to keep the capital stewardship campaign at a high level of visibility during the three-year giving period.

All communication (verbal and printed) should be positive and encouraging. The objective is to help people realize that their faithful giving is accomplishing great things. It is important to avoid negative communication. Publicly acknowledging that giving is behind schedule or that people should give more faithfully can be more damaging than helpful.

In addition to promoting financial results, it is important to keep parishioners aware of the status of the project for which money is being given. This is particularly true if there is nothing visible happening.

When announcing or publishing what has been given to date, simply acknowledge the total given to date. Avoid comparing what has been given to date with a computed projection of what should have been given. It is also recommended that you continue to show the dollar amount announced on Celebration Weekend as the amount committed. Even though you may be receiving new commitments through new parishioner enlistment activities, those commitments will typically make up for normal attrition.

Primary promotion during the follow-up period will include:

- Public announcements
- Bulletin announcements or inserts
- Newsletter articles
- Special newsletters
- Letters with quarterly contribution reports
- Anniversary emphasis

Other promotional ideas are encouraged. Suggestions can be found in the “Ideas” section of this supplement.

Tracking of Commitments

In your diocesan capital stewardship campaign, a procedure to track and record commitments has already been established. ***Be sure and check with your pastor, business manager, consultant or the development office of your diocese concerning the established process for your parish.*** Two scenarios follow that will serve as examples of the most common ways that commitments are tracked.



Example One: When the Parish Is Responsible for Tracking of Commitments

In some cases, the parish will be responsible to record and track all commitments. In the majority of parishes, the recording and tracking of commitments are done by a financial secretary, bookkeeper, business administrator, or someone specifically designated to be responsible for parish financial matters.

If someone is already responsible for these procedures, your responsibility is to help this person to know what will be needed in the way of data entry and reports.

Data Entry:

- Commitments should be entered according to the frequency of giving indicated on the commitment card. It will be important to be able to easily identify those who are ahead and those who are behind in their commitments.

Reporting:

- A quarterly contribution report should be sent to anyone who is giving toward the capital campaign. The report sent to individuals should, if possible, show the amount they have committed to give up to that date and the amount actually given to date.
- Periodically, your diocese may mail to the parish a Follow-Up Report Form. A copy of this form should be completed and returned to the Diocese. Copies should also be given to the Pastor and Follow-Up Team.

Example Two: When the Diocese is Responsible for Tracking of Commitments

In other cases, the diocese will be recording this information from donors directly.

If the diocese is handling the financial tracking of commitments, the parish will receive instructions regarding the process to receive, process and forward commitment cards to your diocese. Please check with your pastor, financial secretary or business manager to make certain that someone from your parish attends any training sessions or seminars for understanding the process.

In addition, the diocese will be generating a regular tracking report for your parish leadership. Normally, this report will be sent to the financial secretary, bookkeeper, business administrator, or someone specifically designated to be responsible for parish financial matters.

You will want to request a copy of this report. This will facilitate any follow-up activities that you and your team choose to undertake.

Enlistment of New Parishioners and Selected Regular Attenders

It will be important to offer an opportunity for new parishioners or selected regular attenders to make a commitment to the capital stewardship campaign for the remainder of the giving period.



- Offering the opportunity for participation helps to integrate a person into the parish community.
- It will be necessary for new commitments to offset the normal attrition of commitments over the three-year giving period.

It will be up to the Follow-Up Team (with consultation from the Pastor and select parish leaders) to determine when to qualify a new parishioner or regular attender for an invitation to an enlistment event. If your parish conducts some type of orientation program, a logical time would be after the completion of this orientation.

There are a variety of events that have been utilized by parishes as a way to introduce new parishioners and regular attenders to a campaign. The list includes:

- Coffee & Dessert Meetings
- Brunches
- Light Buffet Dinners
- Picnics
- Cookouts

Depending on the type of event, they have been held on:

- Weeknights
- Weekends

The most important thing in planning an enlistment event is that it be totally focused on an introduction to the capital stewardship campaign. In other words, it is less effective to try to include an invitation to participate in the capital campaign with other agenda.



Follow-Up Planning . . .

Team Meetings



Follow-Up Planning . . . Team Meetings

Follow-up Team Meetings During the Campaign

The Follow-Up meeting scheduled with your consultant is designed for instruction and review. As you begin to develop your follow-up strategy, **you will need to schedule meetings with the Follow-Up Team that you have selected and enlisted.**

This would be a recommended schedule and agenda for your Follow-Up Team meetings:

TEAM MEETING #1 should be scheduled as soon as possible. Have copies of the Follow-up Calendar Planner (pages 9-10) available for all team members before the meeting for their review.

This meeting should be an input meeting. Ask each parishioner for ideas and opinions, based on suggestions made in the calendar planner. You will want this input as you develop a three-year plan.

Immediately after Team Meeting #1, begin the development of the Three-Year Follow-Up Plan and Calendar. This plan should be ready for presentation at the Follow-Up Meeting scheduled with your consultant.

TEAM MEETING #2 should be scheduled at the same time as Leadership Team Report Meeting #2. It will be during this meeting that you will present your initial follow-up plan to the Leadership Team. Your team should be introduced at this time.

TEAM MEETING #3 should be scheduled at the same time as the Follow-Up Meeting with your consultant (see your Leader's Guide). The purpose of this meeting will be to present your follow-up plan to the Follow-Up Team and your consultant for review and additional suggestions.

ALL OTHER TEAM MEETINGS will be a part of your three-year strategic plan. Calendar meetings with your entire team *at least quarterly*. The agenda for these meetings should be:

- Review giving statistics
 - Total received to date
 - Number giving ahead of schedule
 - Number giving behind schedule
 - Number that pledged who has given nothing to date
 - Number and amount of new pledges
- Review of last quarter's follow-up activities
- Planning for following quarter



Follow-Up Planning . . .

**Develop a Three-Year
Calendar**



Follow-Up Planning . . . Develop a Three-Year Calendar

Develop a Three-Year Plan and Calendar

“Plan your work and work your plan” is the key to a successful follow-up program. It will be far easier to implement a well-developed plan than to try to plan as you go.

Begin your planning with the three-year block calendar (provided in the back of the supplement). The three-year period will usually begin with Celebration Weekend and end on the same weekend of the month three years later.

Follow the steps in the follow-up calendar planner until your complete three-year program is outlined.

NOTE: The temptation is to only plan the first year. The intent is to analyze the first year before planning subsequent years. It is better to go ahead and lay out the full three-year program with the flexibility to make changes as necessary.



Follow-Up Calendar Planner

On a block calendar covering thirty-six months, complete the following steps:

STEP ONE

Place Celebration Weekend, the first and second year anniversaries, and the final weekend of the giving period on your calendar.

STEP TWO

Primary points of communication should be scheduled.

- **Verbal Monthly Announcements** during weekend masses. These announcements should include total dollars received to date and an affirmation to those who are faithfully giving. The Follow-Up Leader, or someone designated by the Follow-Up Leader, will usually make the announcements.
- **Stewardship Testimonials** during weekend masses should be scheduled on an occasional basis (once every two or three months would be appropriate). Testimonials should be given on one of these subjects:
 - God has blessed my/our commitment
 - God has blessed my life through the ministries of this parish

At least three weeks prior to the testimonial, put a reminder on the calendar to enlist someone for the scheduled date. The Pastor may suggest or help enlist someone.

A letter describing the testimonial should be mailed by the Pastor at least two weeks prior to the testimonial. (See model letter in the “Resources” section.) Give a copy of this letter to the Pastor.

- **Verbal Quarterly Announcements** during weekend masses should include a brief report of the status of the project and the total amount received to date. This report could be given by the Pastor or a team chairperson.
 - **Building or Renovation Projects**
 - Prior to the initiation of construction, keep the parishioners informed of all progress. This is extremely important. The planning process sometimes gets bogged down in architectural issues, zoning or permit requirements, and financial negotiations. If this is the case, simply report it. If possible, project an anticipated date for start-up.
 - During construction, simply refer to the progress of construction. Continue to give updates on completion.
 - **Debt Retirement Programs**
 - Speak in terms of dollars saved in interest and projected monies that will become available for ministries.



STEP THREE

Look at the first, second, and third year anniversaries on the calendar. Back up at least four weeks and set a planning meeting with your team and the Pastor to plan the Anniversary Weekends.

STEP FOUR

Set dates for mailing a quarterly report and letter to all who have made commitments or who are giving regularly.

STEP FIVE

Determine how often you want to conduct enlistment events for new parishioners or selected regular attenders. Typically, these events would take place quarterly or when at least ten to fifteen family units would qualify, whichever comes first.

When you have determined the frequency, set dates for these events on your calendar, up through the first quarter of the third year.

Once you have determined the dates for your introduction events, use the planning guide in your “Resources” section to determine dates related to the preparation for these events. Finish the planning guides for each event and place these dates on your three-year calendar.

STEP SIX

Determine the best frequency for meetings of the Follow-Up Team. The team should *at least* meet after the completion of each quarterly report. Place these dates on your three-year calendar.

Put a prompt on the calendar one week before scheduled meetings to send a reminder to team members.

STEP SEVEN

Review the “Ideas” section of the planning guide. Scatter promotional activities throughout the three-year period that would help to focus attention to the capital campaign.

STEP EIGHT

Review the completed Follow-Up calendar to determine when additional meetings of the entire Follow-Up Team will be needed to properly implement the plan.

In addition to planning and program implementation, a review of the current status of the campaign should be a part of the agenda.



Follow-Up Planning . . .

**Presentation of
Follow-Up Plan to
the Leadership Team**



Follow-Up Planning . . . Presentation of Follow-Up Plan to the Leadership Team

You will be asked to make a presentation of the follow-up plan and calendar to the Leadership Team for their approval during Leadership Team Report Meeting #2 or 3.

Provide each member of the Leadership Team a copy of the three-year follow-up calendar.

Ask your Follow-Up Team to be present for the meeting. Introduce each member, giving a brief description of their responsibility.

Review key dates on the calendar with the Leadership Team:

1. Highlight frequency of reports to the parishioners
2. Quarterly Reports
3. New Parishioners Enlistment Events
4. Anniversary dates

Describe plans for new parishioner enlistment events. Highlight one or two special emphasis items.

Having presented this brief review, recommend to the campaign Chair that you are submitting this plan for Leadership Team approval. The campaign Chair should allow for questions and suggestions and then ask for a vote of approval.

Plan on about ten minutes for the entire presentation. There will probably be other items on the agenda for this Leadership Team meeting.



Follow-Up Planning . . .

Resources



**New Parishioner
Enlistment Events**



Follow-Up Planning . . . Resources

New Parishioner Enlistment Events

The following pages contain two optional planning guides that will help you to prepare for an Enlistment Event for new parishioners or regular attenders.

The first planning guide utilizes an information visit team that will make home visits to deliver printed information and encourage attendance. The second planning guide is the same general format without the visits.

*Make a **copy** of the guide you wish to use as a worksheet so that the model can be used more than once.*



Follow-Up Enlistment of New Parishioners With Information Visits

Table of Contents

Suggested Calendar for Enlistment of New Parishioners.....	17
Calendar of Responsibilities for Enlistment of New Parishioners	18
Guide for Follow-Up Enlistment of New Parishioners	19
Resource Materials.....	22
<i>INSTRUCTIONS FOR VISITORS.....</i>	<i>23</i>
<i>SECRETARY'S RESPONSIBILITY.....</i>	<i>23</i>
<i>SAMPLE INVITATION LETTER.....</i>	<i>25</i>
<i>NEW PARISHIONER ENLISTMENT EVENT FACT SHEET</i>	<i>25</i>
<i>NEW PARISHIONER ENLISTMENT EVENT RESPONSE FORM.....</i>	<i>27</i>
<i>HOSPITALITY LEADER'S RESPONSIBILITY.....</i>	<i>28</i>
<i>INSTRUCTIONS FOR HOSPITALITY TEAM.....</i>	<i>29</i>



Suggested Calendar for Enlistment of New Parishioners

Date	Responsibility	Page
Immediately	Train Visitors	_____
As Scheduled	Begin Visitation	_____
Immediately	Schedule New Parishioner Enlistment Event	_____
Immediately	Plan Program Agenda	_____
Two Weeks Before	Mail Invitation Letters	_____
Two Weeks Before	Enlist and Train Hospitality Callers	_____
Two Weeks Before	Make Enlistment Event Response Calls	_____
Week Before	Announcement at Weekend Masses	_____
One Week Before	Receive and Total Positive Responses	_____
One Day Before	Reminder Calls	_____
(Date)	New Parishioner Enlistment Event And Children's Activity	_____
Monday After 1st Weekend	Follow-up Telephone Calls	_____
2nd Weekend After Date	Report Total of New Commitments	_____
Monday After 2nd Weekend	Mail Confirmation Letter	_____
_____	Begin New Invitation List	_____
_____	Schedule Next New Parishioner Enlistment Event	_____



Calendar of Responsibilities for Enlistment of New Parishioners

Date	Responsibility	Page
	Train Visitors	
	Begin Visitation	
	Schedule New Parishioner Enlistment Event	
	Plan Program Agenda	
	Mail Invitation Letters	
	Enlist and Train Hospitality Callers	
	Make Enlistment Event Response Calls	
	Announcement at Weekend Masses	
	Receive and Total Positive Responses	
	Reminder Calls	
	New Parishioner Enlistment Event And Children's Activity	
	Follow-up Telephone Calls	
	Report Total of New Commitments	
	Mail Confirmation Letter	
	Begin New Invitation List	
	Schedule Next New Parishioner Enlistment Event	



Guide for Follow-Up Enlistment of New Parishioners

Train Visitors

Date: _____

Make assignments, provide materials, and train the Visitors to make their visits.

Begin Visitation

Date: _____

Visitors will make contacts, deliver the materials.

Schedule New Parishioner Enlistment Event

Date: _____

Schedule Enlistment Event with Hosts. If a dinner, it should be a buffet-type meal. Divide the number of family units so that no more than 50-60 people will be invited to each event. This will result in an attendance of 30-40 people. Youth can be invited.

Special activities should be planned for children from babies through grade school. You will need a sufficient number of workers based on the anticipated number of children and their ages. A meal or snack and supervised activities for approximately 1½ to 2 hours will be necessary. The invitation letter should include information about the children's activities.

Plan Program Agenda

Date: _____

Plan and schedule the program for the event. The agenda can include:

1. Welcome and prayer
2. Meal or refreshments
3. Introduce capital stewardship campaign and give update on project
4. Video (from Special Event)
5. Testimonial by someone participating in the capital campaign
6. Brief challenge by the Pastor ("How You Can Help")
7. Distribution and explanation of commitment cards
8. Closing prayer



Mail Invitation Letter

Date: _____

Mail a personal invitation to each family unit. The letter should be from the Pastor.

1. The letter will invite them to a specific event.
2. The letter must clearly state that the purpose of the meeting is information, “to share our plans for the future,” and that no financial commitments will be received.
3. It should give details of the activities for children.
4. It should say that someone will call for responses.

Enlist and Train Hospitality Callers

Date: _____

On this date, train Callers to make response calls. A training sheet, fact sheet, response form and assignments should be provided each Caller.

Make Enlistment Event Response Calls

Date: _____

Callers will telephone for responses. Secure and record the number of adults and youth attending the event. Also secure the number, age, and/or school grade of children attending the children’s activities. Report results of response calls to:

(Person) _____ (Date) _____

Mass Announcement

Date: _____

In Mass, announce the New Parishioner Enlistment Event for new families. If a family has not received a response call, encourage them to call the parish office. Also, a testimonial from a capital campaign participant may be included during Mass (es).

Receive and Total Responses

Date: _____

Report the number of positive responses. Provide nametags, commitment cards, etc., for each event.



Reminder Calls

Date: _____

Hosts/Hostesses should telephone each family making a positive response with a brief reminder of tomorrow's event.

New Parishioner Enlistment Event and Children's Activity

Date: _____

Follow-Up Calls

Date: _____

During this week, call those not returning commitment cards on the previous weekend. Ask if they have any questions and encourage them to turn their card in by the next weekend.

Report Total of New Commitments

Date: _____

Report new commitments to the parishioners with a public announcement or newsletter article.

Mail Confirmation Letters

Date: _____

Send a confirmation letter to everyone making a commitment with information about campaign envelopes.

Begin New Invitation List

Date: _____

Begin a new invitation list for the next New Parishioner Enlistment Event. Include those invited to, but unable to attend, the previous event. The next event should be scheduled in three to four months. The above schedule can be repeated.



Resource Materials

1. Instructions for Visitors
2. Secretary's Responsibility
3. Sample Invitation Letter
4. Sample Enlistment Event Fact Sheet
5. Sample Enlistment Event Response Sheet
6. Hospitality Leader's Responsibility
7. Instructions for Hospitality Team



INSTRUCTIONS FOR VISITORS

You will be visiting with new parishioners who have joined (Name of Parish) since the (Title of campaign) capital stewardship campaign. The purposes of your visits are:

1. To welcome them to (Name of Parish) and to encourage them to reflect on what the parish means to them, their family, and the community
2. To express your love and appreciation for (Name of Parish).
3. To leave (Title of Campaign) materials in the home; and,
4. To encourage people to begin praying about their participation in (Title of Campaign).

NOTE: A letter from the Pastor has been mailed to each family to tell them of your visit and its purpose.

INSTRUCTION FOR YOUR VISITS

1. Receive your assignments and materials to be delivered to each home.
2. Telephone to schedule your visit. Suggest a specific time but be flexible in offering an alternative time.
3. Plan a brief visit but be open to stay as long as necessary.
4. When you arrive, introduce yourself and get acquainted. Find out something of interest about the family.
5. In conversation, ask what the parish means to them. Listen for special ministry needs and/or opportunity to tell them about the parish and its ministry.
6. Respond to their comments with expressions of what (Name of Parish) means to you. Do not dominate the conversation with your comments, but create dialogue about the parish.
7. Conversationally, introduce (Title of Campaign). Talk about the parish's relocation plans, growth opportunities, etc. Present the packet of materials, encouraging them to read the information.
8. Tell them that they will receive an invitation to a (Type of Event) meeting where they will learn more about (Title of Campaign).
9. Close your conversation by asking them to begin praying about their participation in (Title of Campaign).
10. Write a brief report of your visit on the assignment card and turn in to the parish office.

SECRETARY'S RESPONSIBILITY



-
1. Divide new parishioners among the dinners.
 2. Mail invitation letter to each invitee.
 3. Prepare for calling assignments, fact sheets, and response form for each Caller.
 4. Prepare the Host/Hostess Training Sheet.
 5. Prepare commitment card and envelope packets for each Enlistment Event. Provide hosts with nametags and other necessary materials.
 6. Mail letters confirming commitments.



SAMPLE INVITATION LETTER

Dear _____:

A few months ago, (Name of Parish) celebrated a great victory. Over \$_____ was committed by this parish in our (Title of Campaign) capital stewardship campaign. But more than money was raised! (Title of Campaign) was a time for spiritual renewal, for growing in our faith, and for new expressions of fellowship.

Yet, there is more to share with you than a letter or the enclosed brochure can tell. So, I am inviting you (your family) to join me for a (Type of Event) with other new parishioners on (day/date). A meal/light refreshments will be served at (time), followed by a brief program. (You will receive a formal invitation in the mail.)

Special activities for your children, from nursery through grade __, have been planned. (Give details.)

I trust that you will make every effort necessary to be present. No financial commitments will be received at this meeting. Our purpose is for information and for sharing our plans for the growing ministry of (Name of Parish).

Someone will call you (Calling Dates) for your family's reservations. I look forward to seeing you on (Date).

Sincerely,

Father _____

NEW PARISHIONER ENLISTMENT EVENT FACT SHEET



Thank you for assisting *(Name)* in inviting certain families of your parish to *(Type of Event)*. These *(Type of Events)* are to be held as follows:

(Date) _____

(Time) _____ p.m.

HOST FAMILY:* Mr. and Mrs. Joe Smith (Joan)
1234 Anywhere
Good City, State 54324
202/424-4567

* If in a home



NEW PARISHIONER ENLISTMENT EVENT RESPONSE FORM

Name: _____

Telephone Number: _____

1. Start calling upon receipt of your letter of invitation.
2. All reports of confirmed event responses should be turned in by *(Date)*.
3. Report information as follows:

EVENT DATE/"HOST"	NUMBER ATTENDING	FIRST/LAST NAME



HOSPITALITY LEADER'S RESPONSIBILITY

1. Enlist hosts/hostesses for calling.
2. Work with the secretary in the preparation of calling assignments.
3. Train hosts/hostesses for calling assignments.
4. Receive reports of response calls. Tally totals for Enlistment Event and for children's activities. Report to the appropriate person.
5. Coordinate the assignments for the reminder calls for each event.
6. Assist in the event as requested.



INSTRUCTIONS FOR HOSPITALITY TEAM

You will be telephoning new parishioners who have registered at (Name of Parish) since the (Title of Campaign) capital stewardship campaign. The purpose of your calls is to encourage attendance and receive responses for a special New Parishioner Enlistment Event.

A letter of invitation will be mailed to each family inviting them to a specific event. They will be told that someone will call them to answer any questions and receive their response.

Attached are your calling assignments, a fact sheet, information about activities for the children, and a response form.

The (Title of Campaign) new parishioner event will include:

- An enjoyable meal/light refreshments.
- Fellowship with other parishioners.
- Information about the parish's plans.
- A presentation of how new parishioners can participate in (Title of Campaign).

NOTE: No financial commitments will be received at the dinners.

MAKING YOUR RESPONSE CALLS

1. Begin making your calls on _____.
2. Make calls until you have reached every household. Call back if necessary. If you must leave a message on an answering machine, tell who you are and that your call is important, and that you will call them back.
3. *A sample conversation:* "Hello, this is (your name) a parishioner at (Name of Parish). Recently, you received a letter from Father inviting you to a (Type of Event) at (time/day/date). I am calling to confirm your attendance." Be prepared to provide information about the program, activities for children, questions, etc.
4. If they are attending, record their response on the response form. Remember to receive information about children. Ask if they need directions to the host home.
5. If they are not ready to confirm their attendance, tell them you will call back. Suggest a time when you will call.
6. If unable to attend, thank them for their time.
7. Complete your calls and turn in your response form to the parish office by _____.



-
8. You may be asked to assist in making reminder calls to those confirming reservations on the evening before the event. SAY: “This is (your name), a parishioner at (Name of Parish). I am calling to remind you of the (Type of Event) tomorrow evening.” If necessary, you can leave a message on their answering machine.
 9. Remember to do everything you can to encourage everyone to attend.



Follow-Up Enlistment of New Parishioners Without Information Visits

Table of Contents

Suggested Calendar for Enlistment Event for New Parishioners	32
Calendar of Responsibilities for Enlistment Event for New Parishioners	33
Guide for Follow-up Enlistment of New Parishioners	34
Resource Materials.....	37
<i>SECRETARY'S RESPONSIBILITY.....</i>	<i>38</i>
<i>SAMPLE INVITATION LETTER.....</i>	<i>39</i>
<i>HOSTESS/HOST LEADER'S RESPONSIBILITY.....</i>	<i>40</i>
<i>HOSTESSES/HOSTS TRAINING SHEET</i>	<i>41</i>



Suggested Calendar for Enlistment Event for New Parishioners

Date	Responsibility	Page
Six Weeks Before	Prepare Arrangements for Enlistment Event	_____
Six Weeks Before	Plan Program Agenda	_____
Six Weeks Before	Secure List of New Family Units	_____
Three Weeks Before	Mail Invitation Letters	_____
Three Weeks Before	Enlist and Train Hostesses/Hosts	_____
Six-Ten Days Before	Hostesses Make Enlistment Event Response Calls	_____
Four-Six Days Before	Receive and Total Positive Responses	_____
Weekend Before	Announcement at Weekend Masses	_____
One Day Before	Hostess Reminder Calls	_____
(Date)	New Parishioner Enlistment Event And Children's Activity	_____
Monday After 1st Weekend	Follow-up Telephone Calls	_____
2nd Sunday After Date	Report Total of New Commitments	_____
Monday After 2nd Weekend	Mail Confirmation Letter	_____
_____	Begin New Invitation List	_____



Calendar of Responsibilities for Enlistment Event for New Parishioners

Date	Responsibility	Page
	Prepare Arrangements for Enlistment Event	
	Plan Program Agenda	
	Secure List of New Family Units	
	Mail Invitation Letters	
	Enlist and Train Hostesses/Hosts	
	Hostesses Make Response Calls	
	Receive and Total Positive Responses	
	Announcement at Weekend Masses	
	Hostess Reminder Calls	
	New Parishioner Enlistment Event And Children's Activity	
	Follow-up Telephone Calls	
	Report Total of New Commitments	
	Mail Confirmation Letter	
	Begin New Invitation List	



Guide for Follow-up Enlistment of New Parishioners

Prepare Arrangements for Enlistment Event

Date: _____

Plan the physical arrangements for an Enlistment Event. If a dinner or luncheon, seating should be at round tables if possible. Table decorations may be simple; nametags should be available for use.

Special activities should be planned for children from babies though grade school. You will need a sufficient number of workers based on the anticipated number of children and their ages. A meal service and supervised activities for approximately 1½ to 2 hours will be necessary. Children may eat with their family and then go to the children's activities.

Plan Program Agenda

Date: _____

Plan and schedule the program for the event. The agenda can include:

1. Welcome and prayer
2. Meal or refreshments
3. Introduce capital stewardship campaign and give update on project
4. Video (from Special Event)
5. Testimonial by someone participating in the capital campaign
6. Brief challenge by the Pastor ("How You Can Help")
7. Distribution and explanation of commitment cards
8. Closing prayer

Secure List of New Family Units

Date: _____

Secure an up-to-date list of all new families that have registered with the parish or who would be considered regular attenders since the close of the campaign. Check to be certain that they did not attend the All-Parish Special Event and/or have not already committed to the capital campaign. If they have begun voluntarily giving to the campaign, they should still be invited to the event.



Mail Invitation Letter

Date: _____

Mail a personal invitation to each family unit. The letter may be from the Pastor or the Follow-Up Leader(s). It should include:

1. A campaign brochure and briefly explain the capital campaign.
2. The letter must clearly state that the purpose of the meeting is information, “to share our plans for the future,” and that no financial commitments will be received at the event.
3. It should detail plans for the children’s activities.
4. It should say that a Hostess will call for responses.

Enlist and Train Hostesses/Hosts

Date: _____

On this date, enlist and train Hostesses and Hosts to make confirmation calls, to serve as greeters, and to host tables (if tables are used).

Hostesses/Hosts Make Confirmation Calls

Date: _____

Hostesses/Hosts will telephone for Enlistment Event confirmations. Secure and record the number of adults and youth attending the event. Also secure the number, age, and/or school grade of children attending the children’s activities. Report results of confirmation calls to:

Person: _____ *Date:* _____

Receive and Total Confirmations

Date: _____

Report the number of confirmations to the caterer. Finalize seating plans, decorations, name tags, commitment cards, etc.

Announcement at Weekend Masses

Date: _____

At the weekend masses, announce the event for new parishioners. Also, a testimony or witness from a capital campaign participant may be included in the weekend masses.



Hostess/Host Reminder Calls

Date: _____

Hostesses/Hosts should telephone each family, confirming attendance with a brief reminder of tomorrow's event.

Enlistment Event and Children's Activities

Date: _____

Follow-Up Telephone Calls

Date: _____

During this week, call those not returning commitment cards on the previous weekend. Ask if they have any questions and encourage them to turn their cards in by the next weekend.

Report Total of New Commitments

Date: _____

Report new commitments to the parish family with a public announcement or newsletter article.

Mail Confirmation Letters

Date: _____

Send a confirmation letter to everyone making a commitment with information about capital campaign envelopes.

Begin New Invitation List

Date: _____

Begin a new invitation list for the next Enlistment Event. Include those invited but unable to attend the previous event. This event should be scheduled in three to four months. The above schedule can be repeated.



Resource Materials

1. Secretary's Responsibility
2. Sample Invitation Letter
3. Hostess/Host Leader's Responsibility
4. Telephone Confirmation Schedule
5. Hostess/Host Training Sheet



SECRETARY'S RESPONSIBILITY

1. Secure list of new parishioners.
2. Mail invitation letter to each invitee.
3. Prepare hostess/host calling sheets (8-10 per hostess/hosts).
4. Use the telephone confirmation sheet with the Hostess/Host Training Sheet and sample invitation letter.
5. Prepare commitment card and envelope packets for each table (if tables are used).
6. Mail letters confirming commitments.



SAMPLE INVITATION LETTER

Dear _____:

A few months ago, (Name of Parish) celebrated a great victory (success). Over \$_____ was committed by this community in our (Title of Campaign) capital stewardship campaign. But more than money was raised! (Title of Campaign) was a time for spiritual renewal, for growing in our faith, and for new expressions of fellowship.

There is more to share with you than a letter or the enclosed brochure can tell. So, I am inviting you (your family) to join me **for (Type of Event)** with other new parishioners on (day/date). *A meal will be served at (time) in the (location), followed by a brief program.

Special activities for your children from nursery through grade _have been planned. (Give details).

I trust that you will make every effort necessary to be present. No financial commitments will be received at this meeting. Our purpose is for information and for sharing our plans for the growing ministry of (Name of Parish).

A hostess/host will call you (early dates) for your family's reservations. I look forward to seeing you on (Date of Event).

Sincerely,

Father _____

PS. Please, do read the enclosed brochure and program update.

** If applicable*



HOSTESS/HOST LEADER'S RESPONSIBILITY

1. Enlist hostesses/hosts for calling and hosting.
2. Work with the Secretary in the preparation of calling assignments.
3. Train hostesses/hosts for calling assignments.
4. Receive reports of confirmation calls. Tally totals for event and for children's activities. Report to the appropriate person.
5. Assign greeters and a table hostess/host to each table (if tables are used).
6. Work with the Secretary in properly distributing commitment card packets.



HOSTESSES/HOSTS TRAINING SHEET

1. A (Type of Event) for new parishioners of (Name of Parish) will be held on (Date). The purpose of this meeting is to share information about the (Title of campaign) stewardship campaign.
2. You are being asked to telephone for confirmations and to serve as a hostess/host.
3. Your calling assignment is on the attached New Parishioner Enlistment Event Confirmation form. Please review the calling instructions on the back of the assignment sheet. Also attached is a sample letter of invitation. Be sure you understand all details related to the (Type of Event) and children's activities.
4. REMEMBER: Those you call will not have had the benefit of the inspiration and information of the major campaign. Do everything you can to encourage their attendance at the event. No financial commitments will be received!
5. Make the confirmation calls on the assigned dates. Be persistent. Call back if necessary.
6. Secure and record the number of adults and youth attending the event. Also secure the number, age, and/or school grade of children attending the children's activities.
7. Report the results of your calls to (person) by (date).
8. Keep the calling sheet. On (day before event), telephone a reminder to each family who confirmed attendance. Say, "I want to remind you of the (Type of Event) tomorrow."
9. Be present on (date of the event) to serve as a greeter or hostess/host.
10. You will be given specific instructions at the event related to the distribution of the commitment cards.



<p>Quarterly Points of Emphasis</p>
--



Quarterly Points of Emphasis

Following are suggestions for the emphasis for each quarter of the giving period. Promotion and communication can be built around these themes.

Important Points of Emphasis

NUMBER ONE

Giving Quarter Number One

During this first three months of the giving period, the emphasis should be on building good habits in giving. Weekly reminders could be included in bulletins, newsletters, and other parish publications. Those who have made commitments are not accustomed to the additional weekly, monthly, or bimonthly offering. It will be a vital step to do all that you can to make this offering a routine.

NUMBER TWO

Giving Quarter Number Two

The emphasis during the second quarter should be similar to that of the first quarter. The next three months should firmly **establish** habit patterns related to the giving process. It will be necessary to give more **weekly** emphasis to the campaign during the first six months than at any other period.

NUMBER THREE

Giving Quarter Number Three

During this period, give particular emphasis to the progress of the particular project. Be sure that parishioners recognize the relationship between the successful completion of your project and the faithfulness of those who have made commitments.



NUMBER FOUR

Giving Quarter Number Four

This quarter will mark the close of the first year of giving. Review and celebrate all that has happened during the first year. Related to the campaign emphasis, give total receipts to date, new parishioner information, and encourage renewed commitment to the campaign.

NUMBER FIVE

Giving Quarter Number Five

Use a theme, like . . . “It keeps getting better.” The emphasis would accent the spirit of giving. Encourage those who have had good experiences in their giving to share those experiences publicly and in interviews. Emphasize the joy of being a part of the good things that are happening as a result of faithful giving.

NUMBER SIX

Giving Quarter Number Six

During this quarter, emphasize the fact that the financial circumstances of some parishioners may have changed. Suggest that is possible to make changes in commitments. If this happens, acknowledge it. Publish figures that show how much interest is saved with each dollar received.



NUMBER SEVEN

Giving Quarter Number Seven

Use the theme . . . “What Your Faithful Giving Means.” List as many things as you can think of that are or have been made possible by faithful giving. Be imaginative. Look at the human aspect of where you are in your project. Center on benefits. Possibilities might include the specific status of a building and what those areas will mean when used for ministry, the victories in giving that have made a difference in people’s lives, the areas of ministry that can be funded or that have been saved because of debt reduction.

NUMBER EIGHT

Giving Quarter Number Eight

It is important to emphasize that this is the end of the giving year. Review the **entire** history of the project. Each week, present a “Remember When” moment. This could be done in print and in public comments. Speak to what the situation was like before the campaign and what it could have been like without the campaign and project. Present a strong statement of gratitude for what people have given.

NUMBER NINE

Giving Quarter Number Nine

During this quarter, promote the fact that this is the last mile of the campaign. Encourage the people to commit themselves to faithfully finishing what they started. Build an entire theme for the quarter around “The Last Mile.” Runners could talk about the importance of “second wind” and finishing the race.



NUMBER TEN

Giving Quarter Number Ten

It is time to begin communicating to the people any future plans that relate to the project. This would include continued information about the status of the project, the beginning of subsequent phases, and/or the preparation for another capital campaign. Seek to fully prepare the parish while continuing to encourage faithfulness.

NUMBER ELEVEN

Giving Quarter Number Eleven

Refer to the last two quarters of the campaign as the “last lap.” Promote the fact that these months will provide the last opportunity to make final installments on commitments. Suggest that this is a good time to catch up if behind. If you are planning to enter into a subsequent capital campaign, all outstanding commitments should be forgiven. This makes it important to promote a strong finish during the last two quarters.

NUMBER TWELVE

Giving Quarter Number Twelve

Use this entire quarter to **celebrate** the faithfulness of the people and the benefits of the project. Emphasize some of the personal victories that have been won as a result of the campaign. Allow individuals to express their joy in being able to fulfill their commitments. Continue to look ahead to the future.



Model Letters



Model Letters

Quarterly Report Letter Number One

Dear _____:

Thank you for your faithful response to your commitment to the *(Title of Campaign)* campaign. It is exciting to see how the people in our parish are working together to fulfill the pledges that were made in *(month)*.

The next few months are critical as we establish patterns for giving. Your continued faithfulness will be a clear indication that we can expect a good response in actual gifts to the campaign.



Quarterly Report Letter Number Two

Dear _____:

Because of your faithfulness in giving, we have been able to accomplish a great deal in the last few months. *{The architect has submitted a final draft for our approval, the building committee has finalized negotiations for the purchase of property, and arrangements have been made for interim financing}. All of this has been made possible on the strength of our successful campaign and your continued response.

We have much to look forward to in the coming months. *{Our new church will offer to each of us a multitude of benefits.} More important will be the ministry opportunities that the additional space will allow us. We enjoy the blessings of this wonderful parish. You will make it possible for many others to enjoy the blessings.

**Replace with your own detail.*



Quarterly Report Letter Number Three

Dear _____:

We are beginning the last quarter of our first year of giving toward our pledges to (Title of Campaign). Your response has been a joy to witness.

To date, we have received _____ dollars toward our commitment of _____ dollars. We are on track to a real victory in giving.

As the next several months unfold, you will see how your faithfulness has made a significant difference to the ministry opportunities in the parish.

Determine to continue in your faithful response to your pledge. You are making a difference.



Quarterly Report Letter Number Four

Dear _____:

Are you aware that you have saved our parish _____ dollars to date in interest? That's right. If it were not for your faithfulness in giving, the parish would have already paid that much in interest charges.

The first year of our campaign has brought _____ dollars in receipts toward commitments. _____ new families have made pledges to the campaign for an additional _____ dollars in commitments.

You can see the *{progress on our new building. We expect to be announcing a dedication date within the next few weeks.}.

Your giving is the reason that we are able to look forward to *{a new _____}. I hope that our second year will be as successful as our first. Our prayer is that God will continue to enable you to be faithful in your giving.

** Replace with your own detail.*



Quarterly Report Letter Number Five

Dear _____:

Your continued response to our _____ campaign is truly appreciated. Together, we have given _____ dollars to date. This represents a significant savings to our parish in interest that would have to be paid. Our ministries will reflect the benefit.

During the span of the three-year period of giving, our financial circumstances change. The commitment card you turned in reflected the fact that this was a statement of intent that could be changed if necessary. We most often think of this in terms of the negative. What if God has given you an unexpected financial blessing? What if your financial position has changed for the better?

You may increase your commitment at any time. It would help if you could notify the parish office of any change. This helps us as we make important financial decisions.

May God continue to bless your faithfulness.



Quarterly Report Letter Number Six

(This letter should accent the benefits of the completed project. Here is an example.)

Dear _____:

When we dedicate our new church in the next few months, your faithfulness in giving will have made possible a number of things:

More people will be able to attend Mass.

Our parishioners will be able to worship at the time they choose.

Individual seats will create a more comfortable worship experience.

New parking will give everyone who comes to worship a place to park near our buildings.

The new organ will add an exciting dimension to our worship.

The new sound system will make it possible for every person to hear the mass.

The enlarged gathering space will allow us to enjoy conversation and fellowship before and after worship.

Our facilities will be an attraction to people looking for a place to worship.

All of this and more because of your faithful giving. Somehow, a simple “thank-you” is just not enough.



Quarterly Report Letter Number Seven

Dear _____:

Do you remember when *{the church was just a dream? When we were hopelessly crowded in nearly all of our masses? When many of us had to walk several blocks if we came late}?

Do you remember when we thought that it would take a miracle to raise *{three million dollars}? When we thought that the campaign would not be successful? When we thought we would have to “scale back” *{the building}?

Do you remember the *{banquet at the Hilton Hotel}? Do you remember when *{Bill Smith} announced that *{120} faithful families had already committed *{1.3 million dollars}? Do you remember the excitement ... the ovation? Do you remember the overwhelming sense of victory when *{Fr. Mark} announced that we had reached the *{3.2 million dollars} mark on Celebration Weekend? The feeling that God had truly done something miraculous.

We have come a long way together in the last two years. The best is still ahead. All of this because you are being faithful to your commitment. Thanks so much.

** Replace with your own detail.*



Quarterly Report Letter Number Eight

Dear _____:

Can you believe that we are beginning the last year of our _____ campaign? Over the past two years, we have received _____ dollars toward *{our new church}.

We are now enjoying the benefits of all that we have sacrificed for. *{Our church} is all that we hoped it would be and more.

Our challenge is to finish that which we started. Our commitment should be to leave this parish in the strongest possible position financially so that ministry will not be affected.

Your continued faithfulness in giving will make a significant difference.

** Replace with your own detail.*



Quarterly Report Letter Number Nine

Dear _____:

You will want to know where we stand in relation to our over all plans related to *{the construction of our church}:

*{Our finance package is in place. We have financed 3 million dollars to be paid in 15 years.

The only thing remaining related to our new construction is landscaping. We estimate that this will be complete in the next month.}

*{Our finance committee is looking at the possibility of a Phase II campaign to reduce the debt. It is believed that the entire remaining debt can be eliminated in the next three years. This would save our parish several million dollars in interest and free current budget dollars from debt service to ministry}. Our current giving to the _____ campaign has reached the _____ dollar mark. This is a wonderful representation of the commitment and sacrifice of our parishioners.

** Replace with your own detail.*



Quarterly Report Letter Number Ten

Dear _____:

This next quarter of giving begins the last lap of our _____ campaign. This is an opportunity to keep up, catch up, give more, or give something to finish our campaign in as strong a position as possible.

You have been faithful and committed in your response to your pledge. To date, we have received _____. Let's finish with a surge.



Quarterly Report Letter Number Eleven

Use this letter as an example. Supply testimonials from your own parish.

Dear _____:

The victories that have been won in our _____ campaign are not just financial:

Jon and Carol Rose: "This campaign has given us an opportunity to see just how faithful God can be. We made a sacrificial commitment that we did not know we could fulfill. Last year, we were able to increase our pledge. God be praised."

Sid and Marty Conners: "Many obstacles have fallen in our way during the last three years. Being able to see what God has done with our sacrificial gift is one of the greatest blessings we can imagine. Even though at times it seemed that it would be impossible to keep up with our commitment, God always provided a way. We have learned to depend on Him."

Jim and Sue Owen: "We had never given anything of significance to the parish before. Being able to give and to see what God has done in our parish and in our family has strengthened our faith."

God has truly blessed our parish. Our prayer is that you have been blessed as you look to see what your giving has meant to this parish and to the Kingdom of God. We can begin to celebrate the victories that have been won during the last three years.



First Letter When Someone Falls Behind In Giving

Dear _____:

Thank you for your faithful response to your commitment to the **(Title of Campaign)** campaign. It is exciting to see how the people in our parish are working together to fulfill the pledges that were made in **(month)**.

The next few months are critical as we establish patterns for giving. Your continued faithfulness will be a clear indication that we can expect a good response in actual gifts to the campaign.

We recognize that there will be times when some of our parishioners will find it necessary to miss turning in a portion of their commitment. If this should happen to you, please know that we understand. If it is not possible for you to make up for the part of your commitment that was missed, simply begin giving again when you can. Your commitment is a statement of intent. We know that you will do your best.



Model Letter for Follow-Up When Commitment Is Not Being Met

Dear _____

There are times when things happen in our lives over which we have no control. That is why, when we asked our parish to make commitments to our _____ campaign, we emphasized the fact that these were statements of intent that could be changed if necessary.

I am confident that you are interested in the very best for your parish, and so I am going to ask you to do something that will be of significant help.

Would you call _____ at our parish at _____. Give them an update on the status of your commitment. If you need to lower it, if you need to cancel it, or you plan to fulfill it in a way other than was originally indicated . . . all you need to do is let us know.

You can imagine how important it is for us to be able to project the expected actual receipts of the campaign. Our realistic planning will make our parish better for all of us.

Be absolutely sure that we know that you are doing the very best that you can. We appreciate your caring enough about your parish to want to participate. We want you to know of our love and continued concern for you.

Warmest regards,



Model Letter Inviting Testimonials During Follow-Up

Dear _____:

Thank you for agreeing to share a testimonial related to your experience in giving to the (Title of Campaign) campaign. As we discussed, I would like for you to be prepared to share your testimonial during the (time) Mass on (date).

It will be helpful to all of us to hear of your personal experience. Because of the importance of this stewardship program, please focus your remarks on experiences related directly to it. You might be able to share how God is helping you to fulfill your commitment or how the ministries made possible by this program are making a difference in your life.

Please keep your testimonial to approximately three minutes. I would encourage you to write it out and read it to the parish. (Sometimes when we are speaking “off the cuff,” we tend to lose important continuity.) Reading your testimonial/witness will also assure that you will be able to stay within the accorded time.

I am looking forward to hearing what God is doing in your life. I know that it will bless and encourage us all.



Bulletin Suggestions



Bulletin Suggestions

These Bulletin Suggestions are based on the Quarterly Emphasis schedule.

QUARTER NUMBER ONE

THEME: BUILDING HABITS OF GIVING

Each week during the first quarter, print simple statements regarding the fact that we are beginning the giving period of the campaign.

Use the Campaign logo with the message: “Now is the time to begin giving toward your commitment to _____.”

Other Messages: “We cannot finish until we first begin. Your commitment to _____ does not begin until you have made your first gift. If you have not begun your giving to the campaign, begin this week.”

“Now is the BEST time to begin your gift toward _____.”

QUARTER NUMBER TWO

THEME: ESTABLISHING GIVING HABITS

Each week during this quarter, print messages in the bulletin that would help people remember to establish giving habits.

Print information that would announce that out of _____ number of people committing to give, at least monthly _____ have already started giving.

Print testimonials from parishioners talking about how they are remembering to include their commitment installment in their giving habits.

Simple statements like: “Don’t forget to be faithful to _____.”

QUARTER NUMBER THREE

THEME: PROGRESS

Each week during this quarter, print information related to the progress in your project. If you are involved in a building program, communicate a different fact each week related to progress made on the project. If you are in a debt retirement program, create a



communication that would include amount received, interest saved, plans being made for ministry, etc.



QUARTER NUMBER FOUR

THEME: THE FIRST YEAR

Each week, print a statement related to things that have happened during the first year of giving. Updates on the project, personal accounts of victories in giving, new parishioner participation and comments, and giving statistics could all be a part of this emphasis.

QUARTER NUMBER FIVE

THEME: "IT KEEPS GETTING BETTER"

Each week, print a brief testimonial from a parishioner who is finding joy in faithful giving. Speak to the Pastor and Leadership Team members. Seek to discover people who are learning of God's faithfulness as they give.

One way to discover testimonials is to print a message after the first two or three that says: "If you have had a meaningful experience during this first year of giving, would you write a brief description and turn it in to the parish office."

QUARTER NUMBER SIX

THEME: YOUR CIRCUMSTANCES MAY HAVE CHANGED

During the first month of the quarter, print this message:

"Things change. Sometimes we are unexpectedly blessed. When our commitments were made, we had no idea that our financial position would be better. Every now and then someone will ask, 'Can we change our commitment?' The answer is Yes! When we made commitments, these were statements of intent. If you would like to change your commitment, please notify the parish office."

During the next six weeks print a bulletin insert with this message:

"If your financial circumstances are such that you would like to increase your commitment, please fill out the following information and place it in the offering or drop it by the parish office."

Name: _____

Address: _____

PLEASE INCREASE MY COMMITMENT TO (Name of Campaign) TO (Amount)

Signature: _____



QUARTER NUMBER SEVEN

THEME: WHAT YOUR FAITHFUL GIVING MEANS

Bulletins for this quarter should present an update on what is happening with the project. Each week offer a different piece of information that communicates what has been accomplished because of faithful giving.

QUARTER NUMBER EIGHT

THEME: REMEMBER WHEN

Each week, place a window in the bulletin that calls to memory what it was like before the campaign. **Example:** “Remember when people had to walk two blocks because our parking lot was full?”

If your campaign was a debt retirement program, the example might have to do with how much the interest would have been, or if budget monies have been released for ministry, what it was like before you could afford those ministries.

QUARTER NUMBER NINE

THEME: THE LAST MILE

Promote the fact that this is the beginning of the last year of giving to the current campaign.

Encourage those who are behind in their giving to not be concerned about what they have not given, but to focus on what they can do during this last year.

Suggest that there might be ways to create a “surge” during the last year. Suggest ways that people could consider to do something during the last year that would add to their commitment.

QUARTER NUMBER TEN

THEME: WHAT’S NEXT?

Use the bulletins each week to address future plans.

If there are going to be subsequent phases of the building program, begin to discuss what they involve.

If the debt has been sufficiently reduced, discuss what that will mean to future ministry.



If you are in the planning stages of what to do next, discuss the teams that are working to put the plans together and what the timetable might be.

If you plan to have a second campaign, begin to prepare the parish, by discussing the work of the team that is helping to prepare for it.

QUARTER NUMBER ELEVEN

THEME: THE LAST LAP

Let this quarter be somewhat of a rest in terms of promotion. Rather than articles or paragraphs, simply print reminders of the fact that the campaign is drawing to a close.

Such as: “There are only a few more opportunities to finish our commitments to _____ . Be faithful to the finish.”

QUARTER NUMBER TWELVE

THEME: CELEBRATION

Each week, celebrate something that has been accomplished during the last three years. This could include construction or renovation descriptions. It could also include personal expressions of growth in the lives of individuals as they have completed their commitments.



<p>Advisory Council</p>



Advisory Council

Your Pastor may want to use this suggestion for the development of an Advisory Council. If a Council is organized, you will want to work with the Pastor to keep it informed as to ongoing campaign results.

DEVELOPING AN ADVISORY COUNCIL

I. IDENTIFY POTENTIAL PARISHIONERS

These potential parishioners should:

- A. Be among the top donors in the capital stewardship campaign.
- B. Be recognized and well-respected leaders in the parish.
- C. Be persons with whom the Pastor, parish staff, and campaign leadership can easily work.
- D. Be persons who will actively and creatively think about how to make the program effective without being hurt if their ideas are not pursued.

II. ENLIST THE ADVISORY COUNCIL

- A. Parishioners should be enlisted by the Pastor and Campaign Chair. To be most effective, this enlistment cannot be delegated. Parishioners should be enlisted individually or in small groups of five to ten and face-to-face (*not on the phone*). Where small groups are used for enlistment, be careful not to put people who might decline to serve in a group enlistment setting.

As an alternative, _____ parishioners can be enlisted to serve as an Executive Committee of the Council. These can then be responsible for the enlistment of the other parishioners. If this is done, the Executive Committee could be responsible for the attendance and participation of the parishioners whom they enlist.

- B. Parishioners should be enlisted to give counsel to the Pastor. The effectiveness of follow-up could make hundreds of thousands, or millions, of dollars difference in the campaign (*depending on the amount of the commitments in your campaign*). Parishioners are asked to bring creative thought and positive critique to the follow-up process. Parishioners are asked to help the Pastor, and campaign leadership to make wise and effective decisions related to follow-up activities.
- C. The Council should meet on a six-month basis.



III. MEET WITH THE ADVISORY COUNCIL

The meeting could be conducted in a home, over lunch or dinner, or in any informal, comfortable setting. The Pastor should direct it.

Activities for the first meeting should include the following:

- A. A review of the purpose and results of the capital stewardship campaign. This review should be very positive.
- B. Outline the scope and activities of the Advisory Council.
 - 1. They are being asked for active and creative counsel on how to keep the capital stewardship campaign alive and to realize the maximum results possible. Be sure to indicate to them that not all of their ideas will be used, but that all their ideas are welcomed.
 - 2. The Council should not be negative, critical, or judgmental. It is to think positively and creatively about how things can work better and more effectively.
 - 3. The Council will meet at least every six months and perhaps more if needed.
 - 4. They may be asked to assist in special program activities.
- C. The Pastor would review with them the progress of the campaign. This should include whatever giving analysis that has been done. All activities since the previous meeting should be recalled and the results evaluated.
- D. Give overview of present follow-up plans and ask for counsel.



IDEAS



Ideas

Use these ideas to enhance your follow-up effort. Obviously, not all of these suggestions will work in every parish. You may need to adapt these ideas to your own situation. The most important thing is to keep the campaign visible, vital, and exciting.

INFORMATION BOOTH

Construct a booth for ongoing information about the capital campaign. Have copies of printed material available for distribution.

Ask someone familiar with the current status of the project being developed to be in the booth during peak traffic periods to answer questions.

Print a registration card for new households, requesting more information about the campaign.

VIDEO STATION

Place a video monitor in a high traffic area or in an information booth. Create a video tape that either automatically loops, or copy the message segment so that the tape repeats up to 30 minutes.

Show pictures of the progress of construction or a focus on ministries made possible because of debt retirement.

Insert 15-second “thank you” messages from key parish leaders.

TOURS

Offer tours of construction site. This can be done during appointed tour times or after Mass.

You will want to rope off a designated path, considering safety issues.

Have a tour guide to identify key areas.

Designate areas with signs for visual identification.

Place signs at a variety of spots that say “Thank you for your faithful giving” or “All of this because of your faithful giving.”



IMAGINATION TOUR

When a construction program has been delayed, stake off the general floor plan on the land. Designate various key areas with signs. Give an Imagination Tour (see “Tours”), asking the people to “just imagine what it will be like when . . .”

THANK YOU BUTTONS

Have medium to large pin-on buttons created that simply say “**Thank You.**”

Give a button to parish staff and key parish and campaign leadership. Ask them to wear these buttons for three or four successive weekends.

When people ask, “Thank you for what . . .,” answer . . . “We want to thank the people of our parish for their faithful giving to the *(Title of Campaign)* campaign. We are really doing great!”

VIDEO BROCHURE

Create a video presentation (about 6-8 minutes), giving a report on the campaign, thanking the people for their faithfulness and inviting new families to join.

Mail a copy to every household.

CONSTRUCTION DEDICATION DAY

Early during the construction phase, invite all the construction workers, contractors, architects, etc., to attend a Mass. Recognize them publicly and have a prayer of dedication for their work.

Indicate that it is due to the faithful giving of the parishioners that this building or renovation project is possible.



BURN THE DEBT BY DEGREES

Instead of waiting until the debt has been completely paid, set incremental points at which you burn that portion of the debt that has been paid.

Speak to what this means to the ministries of the parish and the interest savings that this represents.

Thank the people for their faithfulness.

I HAVE A STAKE IN . . .

Create a poster that can be folded over a yard stake. Make the stakes with posters available to the parishioners. The poster should say: "I have a stake in (Title of Campaign) at (Name of Parish)."

Ask that the stake be placed near the entry door of the home. Each time an individual passes the sign, they should be reminded to pray for the campaign and the parish.

THANK YOU CALLS

Organize a telephone team to call all of those who have been faithful and are up-to-date on their commitments.

Give each caller eight to twelve households. (Since no one will see an entire list, confidentiality will be maintained.)

The caller should simply say: "(Pastor's Name) wanted me to call you to thank you for your faithfulness to the (Title of Campaign) campaign." (Give a brief report on progress.)

AUDIO UPDATE

Ask the Pastor to create an audio taped message giving a status report on the progress of the campaign and the project. In closing, the Pastor should express gratitude for the faithfulness of those who are giving.

The tape could be mailed to every household or distributed on weekends.



CELEBRATION OF MINISTRIES

(This would be particularly effective in a debt-retirement program.)

Target a different ministry each weekend to highlight during Mass. Elements could include:

- Brief (3-4 minutes) video presentation
- Testimonials of those who have benefited from the ministry
- Bulletin insert on the ministry

Communicate how the ministry benefits from the faithful.

COFFEE MUGS

Order coffee mugs with the campaign logo printed on them. Distribute one to each family.

POSTER FESTIVAL #2

Utilize the “Poster Festival” guide to organize a Children’s Poster Festival. Ask the children to develop their posters on one of these themes:

- Finishing What We Started
- It’s Good to Give
- My “New” Parish (if building or renovation)

You may think of other themes.

BULLETIN INSERTS

Occasionally, create a bulletin insert to promote continued faithfulness and to invite new households to join in a commitment to the campaign.



SKITS

Write and produce skits to use during the monthly announcements at Mass. Interject them on an occasional basis for variety.

REFRIGERATOR MAGNETS

If you did not use a refrigerator magnet as a prayer reminder during the campaign, use the ideas for follow-up.

Produce a refrigerator magnet that says “Pray for *(Title of Campaign)*.” Send with a quarterly statement.



**SAMPLES:
FOLLOW-UP REPORT FORMS**



PARISH FOLLOW-UP REPORT

(First Month)

As you complete the first month of giving to your capital campaign, it is important to review your current statistics in order to evaluate your progress and potential better. In providing the following information, make copies available to your Pastor, Campaign Chairs, Follow-Up Leaders, and others as requested in your campaign.

Parish _____

City _____ State _____

Date of Report _____ Financial Reporter _____

Email Address _____ Telephone Number _____

Campaign Title _____

1. Amount committed through your capital stewardship campaign: \$ _____

2. Number of households who made a financial commitment: _____

3. Number of households who were given the opportunity to make a commitment: _____

4. Number of households who returned commitment cards but did not make commitments: _____

5. Amount committed through the Advance Commitment Emphasis: \$ _____

6. Number of commitments received through the Advance Commitment Emphasis: _____

7. Number of gifts in kind received: _____

8. Reported total value of gifts in kind: \$ _____

9. Amount of the largest financial commitment received: \$ _____

10. Goals set for the campaign:

1st Goal \$ _____

2nd Goal \$ _____ (if applicable)

3rd Goal \$ _____ (if applicable)

11. Amount of funds received: \$ _____ as of _____



12. Giving projections for your Follow-up Campaign:

FIRST YEAR'S ANTICIPATED GIVING

From _____ to _____

When Given	Number Committing	Total Committed
Weekly	_____	\$ _____
Monthly	_____	\$ _____
Quarterly	_____	\$ _____
Annually	_____	\$ _____
Other	_____	\$ _____
Total amount expected to be given during the first year:		\$ _____
Percent of the <u>three-year</u> total to be given the <u>first</u> year:		_____ %

SECOND YEAR'S ANTICIPATED GIVING

From _____ to _____

When Given	Number Committing	Total Committed
Weekly	_____	\$ _____
Monthly	_____	\$ _____
Quarterly	_____	\$ _____
Annually	_____	\$ _____
Other	_____	\$ _____
Total amount expected to be given during the second year:		\$ _____
Percent of the <u>three-year</u> total to be given the <u>second</u> year:		_____ %

THIRD YEAR'S ANTICIPATED GIVING

From _____ to _____

When Given	Number Committing	Total Committed
Weekly	_____	\$ _____
Monthly	_____	\$ _____
Quarterly	_____	\$ _____
Annually	_____	\$ _____
Other	_____	\$ _____
Total amount expected to be given during the third year:		\$ _____
Percent of the <u>three-year</u> total to be given the <u>third</u> year:		_____ %



PARISH FOLLOW-UP REPORT

(Sixth Month)

In order to monitor your capital campaign effectively, it is important to review your current statistics in order to evaluate your progress. In providing the following information, make copies available to your Pastor, Campaign Chairs, Follow-Up Leaders, and others as requested in your campaign.

Parish _____
City _____ State _____
Date of Report _____ Financial Reporter _____
Email Address _____ Telephone Number _____

GIVING REVIEW AS OF _____
(Date)

Total Amount of Commitments: \$ _____
Amount Received from Those Who Completed a Commitment Card: \$ _____
Amount Received from Those Who Did Not Complete a Commitment Card: \$ _____
Total Amount Received: \$ _____
Number of Donors Behind in Giving: _____
Total Amount Behind: \$ _____
Number of Donors Who Have Given in Full: _____
Amount Given by Those Who Have Completed Their Commitment: \$ _____
Number of Donors Who Have Given Without Completing a Commitment Card: _____



REVIEW OF THE 25 LARGEST COMMITMENTS MADE DURING YOUR CAMPAIGN

(Please list below your largest commitments, when they are to be given, and how much has been given to date.)

	AMOUNT	SCHEDULE	GIVEN
1.	\$ _____	_____	_____
2.	\$ _____	_____	_____
3.	\$ _____	_____	_____
4.	\$ _____	_____	_____
5.	\$ _____	_____	_____
6.	\$ _____	_____	_____
7.	\$ _____	_____	_____
8.	\$ _____	_____	_____
9.	\$ _____	_____	_____
10.	\$ _____	_____	_____
11.	\$ _____	_____	_____
12.	\$ _____	_____	_____
13.	\$ _____	_____	_____
14.	\$ _____	_____	_____
15.	\$ _____	_____	_____
16.	\$ _____	_____	_____
17.	\$ _____	_____	_____
18.	\$ _____	_____	_____
19.	\$ _____	_____	_____
20.	\$ _____	_____	_____
21.	\$ _____	_____	_____
22.	\$ _____	_____	_____
23.	\$ _____	_____	_____
24.	\$ _____	_____	_____
25.	\$ _____	_____	_____

ASSESSMENT

A total of \$ _____ should be received from these 25 commitments. These 25 pledges represent _____% of the number of people who made commitments, and _____% of the total amount to be given.



PARISH FOLLOW-UP REPORT

(Twelfth to Thirtieth Months)

[NOTE: a report should be filed every six months until the thirty-sixth month report]

In order to monitor your capital campaign effectively, it is important to review your current statistics in order to evaluate your progress. In providing the following information, make copies available to your Pastor, Campaign Chairs, Follow-Up Leaders, and others as requested in your campaign.

Parish _____

City _____ State _____

Date of Report _____ Financial Reporter _____

Email Address _____ Telephone Number _____

GIVING REVIEW AS OF _____
(Date)

Total Amount of Commitments: \$ _____

Amount Received from Those Who Completed a Commitment Card: \$ _____

Amount Received from Those Who Did Not Complete a Commitment Card: \$ _____

Total Amount Received: \$ _____

Number of Donors Behind in Giving: _____

Total Amount Behind: \$ _____

Number of Donors Who Have Given in Full: _____

Amount Given by Those Who Have Completed Their Commitment: \$ _____

Number of Donors Who Have Given Without a Completing a Commitment Card: _____

Amount of Commitments That Have Not Been Activated: \$ _____

Number of Commitments That Have Not Been Activated: _____

PARISH FOLLOW-UP REPORT

(Thirty-sixth Month)

Now that you have completed your capital stewardship campaign, it is important that to record your giving during these three years so that you may properly assess the results. Please provide the following information about your campaign. Copies should be made available to your Pastor, Campaign Chairs, Follow-Up Leaders, and others as requested in your campaign.

Church _____

City _____ State _____

Date of Report _____ Financial Reporter _____

Email Address _____ Telephone Number _____

ANALYSIS OF COMMITMENTS

Total of the **original** amount committed to your campaign: \$ _____

Total of **new** commitments pledged during the three-year giving period: \$ _____

Total of commitments deducted during the three-year giving period: \$ _____

ADJUSTED TOTAL: \$ _____

ANALYSIS OF GIVING

Total given by those making the original commitments to the campaign: \$ _____

Total given by people committing during the three-year giving period: \$ _____

Total given by those who did not make commitments: \$ _____

Total given to your campaign from **all** sources during the three years: \$ _____

ANALYSIS OF PERCENTAGES AND PROJECTIONS

Percentage of total commitments actually given during the three years: _____%

Any amount that you still expect to be given in the immediate future: \$ _____

The final amount that you expect to receive when finished: \$ _____

The final percentage of all commitments you expect to receive when finished: _____%



**Samples:
Block Calendar**



MONTH:

YEAR

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

τ

τ

τ

τ

τ

τ

τ

Sample



FOLLOW-UP SUGGESTIONS

*“Complete it now, so that your eager willingness may be matched
by your completion of it out of what you have.”*

(2 Corinthians 8:11, NAB)

Your follow-up period provides you with an excellent opportunity to implement giving strategies that should benefit your parish for the next 3 years and beyond. The following ideas are a collection of activities that other parishes have used to accomplish their follow-up objectives. As you prepare your follow-up plan, review these suggestions and utilize them to build your structure for educating and encouraging people to be faithful in giving.

REMEMBER: you are attempting to continue to raise stewards, not just to gather money.

1. **COMPLETE YOUR CAPITAL CAMPAIGN.** Make sure that each person is given an opportunity to make a financial commitment during your campaign.
2. **DEVELOP AND MAINTAIN A FILE OF RESOURCES FOR FOLLOW-UP.** Build a library of materials that will help you. Incorporate campaign brochures, commitment cards and tapes. Also, use campaign manuals and materials for developing added resources.
3. **MAKE “CELEBRATION WEEKEND” A POSITIVE MOMENT.** Regardless of campaign results, help those who made a sacrificial commitment feel successful in what they have done.
4. **PLAN, PROMOTE AND CONDUCT “FIRST GIVING WEEKEND.”** Promote, conduct and publicize the date when giving begins and encourage everyone to give on that weekend.
5. **PROVIDE OFFERING ENVELOPES FOR THOSE MAKING COMMITMENTS.** Have them available in Mass during the follow-up period. Provide convenient ways for people to give.
6. **HAVE COMMITMENT CARDS AVAILABLE THROUGHOUT THE PARISH.** Make sure that commitment cards are always conspicuously displayed in the church and in other well-traveled parish locations. Also, have them available during any special programs related to the campaign.
7. **MONITOR INDIVIDUAL AND COLLECTIVE GIVING FOR THREE YEARS.** From the commitment cards develop projection charts for tracking the way the resources will be given. Use this to assess giving patterns and for encouraging giving if you fall behind expectations.
8. **PROMOTE THE CAPITAL PROGRAM AND PROJECT FOR THE DURATION OF BOTH.** Awareness of what is being done should be stimulated through regular mailings, announcements, testimonials, displays, etc.



-
9. **DEVELOP A DISPLAY CENTER.** Promote the progress of your project(s) by creating a display center where pictures, articles, bulletins, testimonials, etc. can be seen by the widest range of audience possible. This could include a display case, bulletin board, table in the foyer, etc.
 10. **KEEP THE PARISHIONERS AWARE OF GIVING PROGRESS.** Public announcements, weekly bulletins, monthly mailings, contribution statements, and periodic letters will keep people informed about their giving. Translate contributions into what the gifts have allowed the parish to accomplish.
 11. **PROVIDE NEW PARISHIONERS WITH REGULAR OPPORTUNITIES TO COMMIT OR GIVE.** New parishioners should be cultivated to give. Utilize your existing “new member” program for incorporating them into your capital program. Plan other activities as well to assist them in participating.
 12. **UTILIZE KEY PROJECT DATES TO ENCOURAGE GIVING.** Dates related to the project provide logical moments to emphasize giving. Consider the approval of architects or contractors, letting of contracts, groundbreaking, building completion and/or dedication, or the approach of another capital campaign.
 13. **PROMOTE “MEMORIAL GIVING.”** Solicit unexpected undesignated funds given to the parish. Encourage that gifts be given toward capital needs as memorials for those who have died or honor special people. Also, as undesignated gifts are given to the parish with “no strings attached,” be prepared to request that all or part be applied to the capital campaign.
 14. **MONITOR THE GIVING OF THOSE WHO DID NOT MAKE FINANCIAL COMMITMENTS DURING THE CAMPAIGN.** Some people who are adverse to making long-term commitments may still give to the campaign. Note and appropriately acknowledge their efforts.
 15. **CONDUCT FINANCIAL AND ESTATE PLANNING SEMINARS.** Provide information on how to handle finances, investments, insurance, taxes, retirement, social security, estates, wills, contributions, etc. Some people will want to include the parish in their estate planning. Encourage this by having well-trained persons available to assist them.
 16. **KEEP A QUALIFIED TEAM AVAILABLE WHO CAN ASSIST PARISHIONERS WITH TRANSFERRING OF “APPRECIATED ASSETS.”** Those who can contribute appreciated assets, such as stocks, bonds, real estate, or valuable possessions need to be encouraged and assisted in doing so. Have people in place that can assist with the disposition on behalf of the givers and the parish.
 17. **KEEP ALIVE THE STEWARDSHIP EMPHASIS.** Make sure the emphasis upon stewardship is maintained. Do not allow the giving period of the campaign to revert strictly to a money only emphasis. Work to maintain special emphasis throughout the year through your promotions, talks, development of a stewardship council, etc.



3-YEAR FOLLOW UP CALENDAR GUIDE (WITH SAMPLE CALENDARS)

Follow these four simple rules in writing your plan:

1. Always ask, *What do we already do?*

For example, in the area of communicating with the parishioners, what does the parish already do? There is no need to re-invent the wheel when there are vehicles up and running that you can use and adapt. Use existing opportunities before developing new ones.

2. Simplify every initiative.

For example, weekly bulletins may be overkill so maybe once a month is sufficient to communicate or even quarterly. Doing fewer things well may have greater impact than doing many things poorly.

3. Calendar the plan.

Plotting initiatives on a calendar happens and allows you to execute the plan having specific deadlines. It also allows you to make adjustments as you see what works and what needs to be modified.

4. Look for multiple duty opportunities.

For example, a parish-wide celebration might be an opportunity to celebrate accomplishments, to communicate information, to say thank you, and to invite new participation/commitments.

Planning tips:

1. Communication:

Provide good information to keep donors connected.

People want to know how their commitment is making a difference.

Focus on news, decisions, impact, ministries and people rather than on dollars.

Vary your means of communication.

Use the follow up phase to build trust as opposed to breeding discontent.

2. Reporting:

Be consistent, accurate and timely

Add interest to “dry” financial reports

Keep reports simple to a few simple line items:

☐ Amount pledged for the whole program.

☐ Amount received since the last report.



-
- ☐ Total amount received to date.
 - ☐ Completed aspects of the program (case).

3. Involving New People in the Program:

Great care was taken to involve people, inform people and then to invite people to make a commitment. Treat new potential donors in your parish with the same respect.

- ☐ Involve new people in the parish (investment follows involvement).
- ☐ Inform new people about the project(s) and the program.
- ☐ Invite new people to make a commitment.

4. Discovering/Celebrating:

- ☐ Too often parishes forget to take time to celebrate the good things that God is doing! Look for opportunities to celebrate accomplishments, milestones, new ministries, etc. Build enthusiasm and excitement!
- ☐ Have fun with celebrations. Help people to see and to feel good about the difference they are making in your parish through their giving.

5. Growing a Stewardship Culture:

- ☐ Consistent teaching and homilies.
- ☐ Lay testimonials.

6. Expressing Appreciation:

- ☐ **Every** initiative in your plan is an opportunity to say thank you – from a thank you note to each individual's quarterly statement to a moment for the children's religious education class to say thank you for new space at the parish.

Always say thank you at every opportunity.



DEVELOPING A THREE-YEAR CALENDAR

ON A BLOCK CALENDAR COVERING THIRTY-SIX MONTHS, COMPLETE THE FOLLOWING STEPS:

STEP ONE

Place Celebration Weekend, the first and second year anniversaries, and the final weekend of the giving period on your calendar.

STEP TWO

Primary points of communication should be scheduled.

Monthly Announcements

These announcements should include total dollars received to date and an affirmation to those who are faithfully giving. The Follow-Up Leader, or someone designated by the Follow-Up Leader, will usually make the announcements.

“Stewardship Talks” should be scheduled on an occasional basis (once every two or three months would be appropriate). “Stewardship Talks” should be given on one of these subjects:

- God has blessed my/our commitment
- God has blessed my life through the ministries of this parish

Two weeks prior to the witness/testimonial, put a reminder on the calendar to ask the Pastor to enlist someone for the scheduled date.

Quarterly Announcements should include a brief report of the status of the project and the total amount received to date. This report could be given by the Pastor or a committee chairperson.

- Building or Renovation Projects
 - Prior to the initiation of construction, keep the parish informed of all progress. This is extremely important. The planning process sometimes gets bogged down in architectural issues, zoning or permit requirements, and financial negotiations. If this is the case, simply report it. If possible, project an anticipated date for start-up.
 - During construction, simply refer to the progress of construction. Continue to give updates on completion.
- Debt Retirement Programs
 - Speak in terms of dollars saved in interest and projected monies that will become available for ministries.



STEP THREE

Look at the first, second, and third year anniversaries on the calendar. Back up four weeks and set a planning meeting with your committee and the Pastor to plan the Anniversary Weekends.

STEP FOUR

Determine how often you want to conduct enlistment events for new parishioners or selected regular attendees. Typically, these events would take place quarterly or when at least ten to fifteen family units would qualify, whichever comes first.

When you have determined the frequency, set dates for these events on your calendar, up through the first quarter of the third year.

Once you have determined the dates for your introduction events, use the resource guide in to determine dates related to the preparation for these events. Finish the planning guides for each event and place these dates on your three-year calendar.

STEP FIVE

Determine the best frequency for meetings of the Follow-Up Team. The team should *at least* meet after the completion of each quarterly report. Place these dates on your three-year calendar.

Put a prompt on the calendar one week before scheduled meetings, to send a reminder to committee parishioners.

STEP SIX

Review the “Ideas” section of the follow-up leaders resource guide. Scatter promotional activities throughout the three-year period that will help focus attention on the capital stewardship campaign.

STEP SEVEN

Review the completed Follow-Up calendar to determine when additional meetings of the entire Follow-Up Team will be needed to properly implement the plan.

In addition to planning and program implementation, a review of the current status of the campaign should be a part of the agenda.



		Sunday	Sunday	Sunday	Sunday	Sunday
2020	July	7	14 In Church Report	21	28	
	August	4	11	18 Stewardship Testimony	25	
	September	1 Newsletter Month Labor Day	8	15	22	29
	October	6	13 In Church Report	20	27 Distribute Letter of Thanks to Church Family	
	November	3	10	17 Stewardship Testimony	24	
	December	1 Newsletter Month Sunday after Thanksgiving	8	15	22	29



		Sunday	Sunday	Sunday	Sunday	Sunday
2020	January	5	12 In Church Report	19	26	
	February	2	9	16 Stewardship Testimony	23	
	March	2 Newsletter Month	9	16	23	30
	April	6	13 Palm Sunday	20 Easter Sunday	27 In Church Report	
	May	4	11 Mother's Day	18 Stewardship Testimony First Anniversary Celebration	25 Memorial Day Weekend	
	June	1 Newsletter Month	8	15 Father's Day	22	29
	July	6	13 In Church Report	20	27	
	August	3	10	17 Stewardship Testimony	24	31 Labor Day Weekend
	September	7 Newsletter Month	14	21	28	
	October	5	12 In Church Report	19	26 Distribute Letter of Thanks to Church Family	
	November	2	9	16 Stewardship Testimony	23	30 Sunday after Thanksgiving
	December	7 Newsletter Month	14 18 Month Anniversary Members Complete Recommitment Cards	21	28	



		Sunday	Sunday	Sunday	Sunday	Sunday
2020	January	4	11 In Church Report	18	25	
	February	1	8	15 Stewardship Testimony	22	29
	March	7 Newsletter Month	14	21	28	
	April	4 Palm Sunday	11 Easter Sunday	18 In Church Report	25	
	May	2	9 Mother's Day	16 Stewardship Testimony Second Anniversary Celebration	23	30 Memorial Day Weekend
	June	6 Newsletter Month	13	20 Father's Day	27	
	July	4	11 In Church Report	18	25	
	August	1	8	15 Stewardship Testimony	22	29
	September	5 Newsletter Month Labor Day Weekend	12	19	26	
	October	3	10 In Church Report	17	24	31 Distribute Letter of Thanks to Church Family
	November	7	14 Stewardship Testimony	21	28 Sunday after Thanksgiving	
	December	5 Newsletter Month	12	19	26	



2005	January	2	9 In Church Report	16	23	30
	February	6	13	20 Stewardship Testimony	27	
	March	6 Newsletter Month	13	20 Palm Sunday	27 Easter Sunday	
	April	3	10 In Church Report	17	24	
	May	1	8 Mother's Day	15 Stewardship Testimony Third Anniversary Celebration	22	29 Memorial Day Weekend
	June	5 Newsletter Month	12	19 Father's Day	26	



SAMPLE FOLLOW-UP CALENDAR FIRST YEAR

<u>Month</u>	<u>Activity</u>
1	Weekly bulletin corner for (name of campaign) . Stewardship thoughts (provided), total amount committed, amount received to date. If this is a regular feature in the bulletin, people will be aware that the campaign is still going on.
1	Regular, say bi-weekly at first, verbal announcements about campaign status. Best done by Pastor, one of the Campaign Chairs or a Follow-up Leader.
1	Make sure campaign giving envelopes are in the pews (from parish office)
1	Stewardship testimonial by a campaign chair-work with Pastor
2	Weekly bulletin information
2	Verbal status report (bi-weekly)
2	Stewardship testimonial
3	Weekly bulletin information
3	Verbal status report (monthly)
3	Stewardship testimonial
4	Bookkeeper sends out first quarterly statement, listing initial commitment amount and amount received to date with a thank-you.
4	Weekly bulletin information
4	Verbal status report (monthly)
4	Stewardship testimonial
4	Newcomer Information Meeting
4	Follow-up committee meets to assess progress.
5	Weekly bulletin information
5	Verbal status report (monthly)
5	Stewardship Testimonial
6	Weekly bulletin information
6	Verbal status report (monthly)
6	Stewardship testimonial
7	Weekly bulletin information
7	Verbal status report
7	Stewardship testimonial



7	Bookkeeper sends out quarterly statements
7	Follow-up committee meets to assess progress
8	Weekly bulletin information
8	Verbal status report
8	Stewardship testimonial
8	Newcomer Information Meeting
9	Weekly bulletin information
9	Verbal status report
9	Stewardship testimonial
10	Weekly bulletin information
10	Verbal status report (monthly)
10	Stewardship testimonial
10	Follow-up committee meets to assess progress
10	Bookkeeper sends out quarterly report
11	Weekly bulletin information
11	Verbal status report
11	Stewardship testimonial
12	Weekly bulletin information
12	Verbal status report
12	Stewardship testimonial
12	First Annual Celebration Event, modeled after Special Event from Weekend IV

The second year looks like the first year. Month one would have the monthly bulletin, verbal status reports, stewardship testimonial and the quarterly report from the bookkeeper. You might also want to plan the Celebration event in month 12 of the first year but hold it in month one of the second year. You always have flexibility based on the church and pastor's calendars.

It is very important that commitment and giving envelopes be brought to the attention of parishioners on a regular basis; possibly every other week for the first three months of follow-up. Many parishioners will not have completed a card during the active part of the campaign. Gentle but regular announcements by the Pastor will bring in greater participation

The success of your follow-up planning and implementation will be greatly enhanced as you bring others into a position of strategic responsibility.



Thank You Letter (Sample)

Note: This letter may be sent out periodically after the Celebration Weekend to give people a sense of the participation and gifts received and to keep enthusiasm for the campaign alive.

Dear (Name):

I have some exciting news to share with you. During the last **(number of months)**, we have received a total of \$_____ in our *(Campaign Title)* campaign. It is because of people like you that this has happened. Thank you for your faithfulness.

I count it a privilege to be your pastor. If I can ever be of help to you and your family, please let me know.

May our Lord richly bless you.

Yours and His,

Pastor



Quarterly Follow-up Letter to Those Not Pledging (Sample)

Note: This letter may be modified and sent out once a quarter for a year, and then once a year after that.

Dear (Name),

For the last several months our parish family has been on a spiritual journey called (Campaign Title). God has some great things in store for our parish and the Church of (Name of Diocese/Archdiocese). It is only through our talents and resources, generously given back to Him, that these dreams become reality.

As you will recall with me, our parish goals are to:

- ☐ Project – (\$ dollars)
- ☐ Project – (\$ dollars)
- ☐ Project – (\$ dollars)

I am happy to report that (Number) parishioners and families have stepped forward with prayers, service and financial commitment for our *(Campaign Title)* campaign. I also know that the Lord Jesus seeks to “draw all people to Himself” and His mission. To be fully successful, then, we need everyone’s participation.

I am contacting you because:

- ☐ You may have been unable thus far to participate with us in *(Campaign Title)* or
- ☐ You may have joined (Name of Parish) after the initial launch of campaign.

Enclosed is the *(Campaign Title)* parish brochure, Question and Answer sheet, and pledge card/envelope. You may contact me or (Campaign Chair(s)’ Names) for more information.

I am asking you to participate in *(Campaign Title)* **by** praying, “Lord, what do You want to do, through me, for my parish and the Church of (Name of Diocese/Archdiocese)?” Let Him guide you as you prayerfully consider your participation in this effort and your gift to Him.

God bless you in your prayer and discernment,

Pastor

P.S. Please pray, complete your pledge card and return it in the collection at Mass or to the parish office as soon as possible.



Re-commitment Letter to One-time Donors (Sample)

Note: This letter may be sent out to the one-time donors each year around the anniversary of your commitment weekend.

Dear (Name),

I hope that this last year has been one filled with love, grace and blessings for you. It is a time for us to be grateful to our good and loving Father for all His blessings, small and large.

The (Campaign Title) Committee and I are grateful for the commitment of all our parishioners who are joining us in achieving our parish and diocesan vision of strengthening our parish and (arch) diocese for years to come. Without your support and sacrifice this successful effort would not have been imaginable.

We are grateful for the gift that you made to (Campaign Title) last year. We know well that there are many reasons why a person cannot pledge for more than one year at a time. Knowing that some people can only commit on a year-to-year basis, I would like to ask you to prayerfully consider making another gift of the same amount to (Campaign Title) this year.

Enclosed you will find a card and envelope. If God has moved you, please complete the card, make out your check to (Campaign Title) and renew your commitment to this wonderful vision. Your gift may be returned in the collection at a weekend Mass or to the parish office.

Again, I thank you for your prayer sacrifice. It's only by our deep faith and by working and giving together that we can do such great things for the Lord.

May God's choicest blessings be yours,

Fr.

P.S. Please complete the pledge card and your check, enclose it in the envelope and drop it in the collection at Mass.



A YEAR-ROUND STEWARDSHIP PROGRAM

CREATING POSITIVE ATTITUDES TOWARD GIVING

“Some money is sad money, some is happy money. Sad money is paid as a duty or penalty. Taxes, debt-payments, fines – these are paid with sad money. Unfortunately, many parish members respond to stewardship appeals with sad money.”¹ In contrast, Ashley Hale continued with an example of happy money as that used, “... when you spend more than you should on a loved one’s birthday present. Happy money giving is generous giving. Members of a community who give happy money will get along better with each other and love their parish more than a community that is giving sad money.”²

This is one of many concepts that can create a compelling change in the stewardship culture of a community. If we are to fulfill the vision of “*Growing our people to grow our parish*” and the mission to “*Know God’s call and purpose for our parish*”, then a year around plan must be in place to accomplish this continuing growth in grace. Talking about “money” for only a few weeks each year during the annual “pledge drive” is merely a formula for maintaining the status quo.

Most communities have difficulty discussing the financial aspect of Christian stewardship. In fact, most communities seem to shy away from discussing a holistic view of stewardship. Usually the only ones leading these discussions are the leaders. Rarely do “people in the pews” have a forum in which to express their own views.

The following twelve-month flow is not based upon a calendar or fiscal year. It begins when parishioners are asked to consider stewardship responsibilities. It is based upon obtaining a wide range of viewpoints on stewardship education and how this should be handled. That is, beginning and maintaining an emphasis upon, and forums for, dialogue. This lays a foundation to create a community of generous people.

MONTH ONE

Volunteers. Typically, those who led the annual pledge program are recruited only a few months (or weeks!) before that drive is to begin. A couple of months are often viewed as ample time for new volunteers to prepare a pledge drive. Too few estimate correctly how much time and effort are required, especially if they have never been involved in such an effort.

Now is the time to enlist those who will be leading the next annual pledge effort.

¹ Ashley Hale, *The Lost Art of Church Fund-Raising* (Chicago: Precept Press, 1993), 52.

² Hale, *The Lost Art*, 54.



Assessment. Next, an assessment of community stewardship patterns for as many previous years as possible must be undertaken. This includes compiling (1) a list of gifts at each dollar level, (2) a list of numbers of volunteers within each parish ministry or program, and (3) a list of those who volunteer in charities outside of the parish but supported by parish gifts. While it is easy only to focus on List #1, the entire issue of stewardship enhancement will not be served if the next two are not also quantified. From these figures, a calculation can be made whether there is increasing or decreasing volunteer involvement and financial support.

- ◆ The number of volunteers
- ◆ The number of volunteer households
- ◆ The ideal number of volunteers needed
- ◆ The total dollar amount given
- ◆ The number of contributing households
- ◆ The membership of the parish
- ◆ The average Sunday worship attendance
- ◆ New-member giving
- ◆ The number of non-givers

It is essential that stewardship enhancement volunteers know from where they are starting. For example, it is possible for a parish to realize about the same (or slightly higher) amount in given year or two, yet have an eroding donor base. This is true of the need for volunteers as well. Community stewardship trends need to be clearly identified and assessed.

Estate Planning. One aspect of stewardship enhancement which is much spoken of but rarely implemented is the area of estate planning (wills, trusts, bequests). This area is vital to well-rounded view of stewardship. Often within a community are individuals who have professional expertise in this area (attorneys, CPAs, financial planners, etc.). Additionally, many denominations have national and/or regional foundations which offer (either free of charge or travel cost-recovery) workshops on estate planning.

Now is the time to initiate planning for such a workshop; one which should be annually on the calendar. Select a date within the next 45-90 days, if possible, to hold such a workshop. Begin plans for advertisement, invitation mailings, etc. in order for this to work successfully. If this is the first one of such workshops (or the first in many years), see it again as one more first step in changing the stewardship culture of the community.

MONTH TWO

Reporting and reactions. Statistics in this format may never have been presented to the board. If for example, in the past, only an average financial pledge has been reported, some leaders may believe that most members give about the same amount. The same is true about the actual number of regular volunteers in parish ministries and programs. At this point, the



reaction of leadership is most important. If for example, financial pledge level is the same or slightly higher, some may view this level as acceptable. If so, the stewardship enhancement Committee will not have full support for new initiatives.

The enthusiastic and visible support of parish leaders is critical to on-going success of any stewardship enhancement initiatives – not just during the “pledge period” but throughout the year. This support includes a commitment on the part of parish leaders (clergy and laity) to basics of good stewardship – in the financial area, generous proportional and systematic giving; in the area of involvement in parish ministries and programs, unqualified support. Stewardship seen as *a way of life* by parish leaders will set an important example for others, which will create a favorable climate toward giving of time, talent, and treasures throughout the community.

MONTHS THREE AND FOUR

Engagement and Dialogue. Promotion – from pulpit announcements, newsletter and bulletin announcement, etc. – should signal that informal discussion regarding stewardship will be held after the Mass for the next several weeks. There should not be any expectation of large crowds in attendance at these forums. However, it is necessary to frequently inform people that such stewardship discussions are underway.

The Stewardship Committee will have to be proactive in the engagement of the community. One example is to briefly summarize a variety of stewardship issues and mail copies to the top 50% of financial givers, requesting their feedback. Such dialogue cannot be understated.

First, a great deal will be learned about attitudes – time commitment, how people view the role of money in their lives and in the parish, value of ministries and programs, etc. Stewardship enhancement initiatives must address the current, prevailing attitudes and beliefs of parish members. All views are important ingredients in creating the correct response of education, motivation, and information.

This dialogue permits the Stewardship Committee to address financial issues that have the most significant impact on the lives of members. This is much more effective than the Committee thinking up a theme on its own. Let the community determine its own themes. This is particularly important because these issues are complex, and could not possibly be addressed in one year.

Second, this engagement dialogue helps clarify the role of the Stewardship Committee. [The addendum section contains sample questions.] A report to the community might begin as follows:

“Here are the hopes and dreams members of this community have articulated to us; here is how the leadership intends to carry them out; and here is how resources (financial and human) will be utilized through our parish....”



Volunteer Enlistment. Although, the Stewardship Committee is not, nor should become, the primary avenue of volunteer recruitment in a parish; the Committee must know stewardship education efforts will have impact on this area. Contact should be made with whatever avenue of volunteer enlistment/recruitment in operation by the parish (volunteer coordinator, nominating committee, etc.) to begin coordination between stewardship enhancement education regarding stewardship of time and talent and the actual enlistment and integration of volunteers into the ministries and programs of the parish. This should be the first of an on-going program of cooperation and mutual support within the volunteer system of the parish.

MONTHS FIVE AND SIX

Reporting to the Community. By now the Stewardship Committee will have gathered a variety of opinions and impressions. Without doubt some of these will be conflicting. Some will be heartening, others discouraging. A negative comment may provide the best opportunity to address a problematic or long-standing issue that has impeded an effective and empowering understanding of what stewardship is.

Parish leaders should be integral in this discussion regarding members' attitudes towards the total stewardship. Use attributable quotations whenever possible. All parish leaders should agree on one conclusion – they wholeheartedly support the effort to engage all who identify with the parish in the dialogue about the contribution of money, time, effort, and energy in parish and in our lives as the basis of effective, on-going stewardship enhancement and education.

MONTHS SIX AND SEVEN

The more time available to engage the community before the “annual pledge drive, “the better. If the discussion – particularly around financial giving – is set in the context of education, exploration, and empowerment in faith, the less likely that parish leadership will be criticized for talking “too often about money.”

Here is a time also to research among pastors, and/or stewardship committees from other faith traditions in your immediate community. It will be revealing to learn about how giving and volunteer involvement patterns compare with other faith groups in the greater community. The more that parish leaders are aware of stewardship practices in neighboring religious settings other than their own, the more they will be able to implement effective stewardship emphases.

Challenge. Now it must be determined to what extent the community may be challenged to increased generosity. Challenging people to lead lives of increased generosity must be addressed. John and Sylvia Ronsvalle write, “The main thing blocking churches support is simply a surpassing urge for more affluent living . . . rival attractions seem to be gaining more of the



religious dollar.”³ To what extent will the leadership challenge spending on these rival attractions?

Will people welcome such a challenge? Will some find it offensive? Of course. This type of challenge may run counter to customs and habits that have been held even for decades and decades. Do not expect overnight change or even wholesale acceptance of a year around emphasis upon issues related to stewardship. People are being asked to change their lives in a fundamental way.

MONTHS EIGHT AND NINE

At this point, the “annual pledge drive” may be on the horizon. The next step is to begin research which will culminate in a brochure supporting the vision, mission, purpose, and values of the community. Begin by contacting all ministry and program leaders and ask them to write a brief article that includes the following:

- ◆ A brief description of what the ministry/committee/board/program does
- ◆ What they would like to accomplish in the coming year
- ◆ The estimated cost of the work for the coming year
- ◆ Larger hopes and dreams – for the coming year and the next three to five years
- ◆ Names of volunteers, committee members, etc.

This material should be published in full form to be distributed to the entire community. Such a publication provides an opportunity for the pastor/parish director, board chair, and Stewardship Committee to articulate the important role that stewardship plays in parish and in each life. This publication, in turn, should be edited into a smaller publication which gives highlights of the scope and breadth of the ministries and involvement of the parish at large. This piece, then, can be used during the actual annual financial stewardship emphasis.

Note: always reserve the right to edit the articles for content and length from various groups.

Now is the time to contact your consultant for counsel by telephone.

MONTHS TEN THROUGH TWELVE

This time frame is most familiar territory for many Stewardship Committees. Continuity of leadership is important if the task of stewardship enhancement is to be effective long-term.

³ John and Sylvia Ronswalle, *Behind the Stained Glass Windows: Money Dynamics in the Church* (Grand Rapids: Baker Books, 1996), 35.



Final thought. While not a part of the Stewardship Committee's responsibilities per se, you might encourage the pastor and other parish leadership to determine other dimensions in which the community has grown in faith during the previous year.

- ◆ How do new members feel about being part of this community of faith?
- ◆ In what ways has the parish called each of us to live more spiritual lives?
- ◆ How has our faith manifested itself in parish and in the larger world?
- ◆ Are there memorable moments that members might relate to the community that demonstrate a growing faith or the presence of God at church or in their everyday lives?

These issues are integral in creating meaningful lives. Stewardship is not separate from life, but is at the heart of a person's existence – the management of the very resources entrusted to an individual. This is fabric of life woven into what God calls us to be and do, and how we respond.

MONTH ONE

- ☐ Enlist Volunteer Team for next Annual Pledge Effort
- ☐ Begin Volunteer and Financial Giving Assessment by compiling statistical lists
- ☐ Begin Assessment of Total Stewardship of Parish
- ☐ Implement Procedures for Conducting Estate Planning Workshop in Month Two, Three or Four
- ☐ Contact Leader of Parish's Pastoral Council to be on Agenda in Month Two in order to present report of Communities Total Stewardship History
- ☐ Plan Regular (at least monthly) highlighting of one specific ministry, program, or outreach to the community – the ideal forum is the weekend Mass time

MONTH TWO

- ☐ Meet with Parishes Pastoral Council to report
- ☐ Begin investigation of professionally produced stewardship education materials
- ☐ Implement promotion of first ministry "highlight"
- ☐ Begin planning on-going engagement of the community in discussion about stewardship with members of the community – for third and fourth months

MONTHS THREE THROUGH SEVEN

- ☐ Contact whatever avenue of volunteer enlistment/recruitment in operation by the parish (volunteer coordinator, nominating committee, etc.) to begin coordination between stewardship enhancement education regarding stewardship of time and talent and the actual enlistment and integration of volunteers into the ministries and



programs of the parish. This should be the first of an on-going program of cooperation and mutual support within the volunteer system of the parish.

- ☐ Research the stewardship patterns in neighboring parishes and churches of differing faith traditions.
- ☐ Begin dialogue within the parish leadership body (board, etc.) related to the challenging of resource allocation by members from a faith perspective.
- ☐ Be alert to sources of stewardship education literature. The parish office often receives promotion material for such literature. Ask them to distribute such promotional material to the Stewardship Committee. Set up a time with the Pastor to discern if any of this material is suitable for the unique culture of your community.

MONTHS EIGHT & NINE

- ☐ Contact all ministry/board/committee/program leaders for information to include in pre-pledge program publication. Give them plenty of time, guidance in the writing of these articles, but also a firm deadline.
- ☐ Begin other plans for the annual emphasis.



ADDENDUM

SAMPLE ISSUES AND QUESTIONS:

A number of issues, of which the typical parishioner may be unaware, lie beyond the local community. These are important, however, to introduce into any dialogue.

- ◆ Parishes exist in an increasingly indifferent, and sometimes, hostile environment.
- ◆ Parishes are having a diminishing effect on society. The parish's voice seems to be silent on many ethical and moral issues of the time.
- ◆ Parishes and members are powerfully affected by an increasingly materialistic culture, one that exalts the massive accumulation of materials goods.
- ◆ Some parishes are becoming less and less distinguishable from other places of commerce and entertainment.
- ◆ Parishes face ever-increasing competition from TV, movies, sports, and professional organizations of various sorts.
- ◆ Parishes seem to have less and less to do with people's work lives, economic lives, and the pressures families face day-to-day.⁴

Numerous issues will be of more immediate consequence. These are more obvious in initiating and sustaining effective stewardship enhancement and education.

- ◆ We are not asking for a pledge. The challenge is to become generous people. How will people react to this challenge?
- ◆ Will we lead lives that go against the grain of the prevailing consumer culture? Are we called to lead lives of dedication, commitment, and even, sacrifice?
- ◆ Can we ask ourselves to forego the purchase of consumer items, and make larger gifts either to our parish or to other causes?
- ◆ Stewardship is not just the amount we give, but how we manage all of the resources in our control. Do we live our lives any differently from our unchurched friends, family, and neighbors?
- ◆ What is the parish called to be and do? What is our sense of common purpose?
- ◆ Many parishes give between 10 to 40 percent of their budgets to outside charitable groups and causes. What is our obligation beyond our four walls?
- ◆ Should members consider this parish to be their primary charitable commitment?
- ◆ Should members increase their financial commitments this year and every year they are members of this community of faith?
- ◆ What does the concept of proportional (percentage) giving mean to you?

⁴ Robert Wuthnow, *The Crisis in the Churches: Spiritual Malaise, Fiscal Woe* (New York: Oxford University, 1997). These themes are discussed throughout this important work.