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## PACESETTER PROCESS DATES

The Pacesetter Gifts Leader(s) will be asked to work with the Pastor, Campaign Chairs and Advance Commitment Leaders to identify pacesetters (those able to make one of the top 10 gifts) and develop strategies to inform and solicit pacesetters.

**Training ->Build Team -> Prospect Review -> Solicitor Recruitment -> Solicitor Training ->Pacesetter Solicitation -> Thanking/Recognition of Pacesetters**

### MEETINGS

Leadership Team Training/Pacesetter Gifts Meeting #1	_____
Report #1/Pacesetter Gifts Meeting #2	_____
Report #2/Pacesetter Gifts Meeting #3	_____
Report #3/Pacesetter Gifts Meeting #4	_____
(If scheduled) Report #4/Pacesetter Gifts Meeting 5	_____

### TASKS COMPLETED

Lists Gathered by:	_____
Prospect Review started by:	_____
Prospect Review completed by:	_____
Solicitors recruited by:	_____
Solicitors trained on:	_____
Pastor Announcement Letter sent on:	_____
Pacesetter visits started by:	_____
Pacesetter visits completed by:	_____
Advance Commitment Gathering:	_____



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## Pacesetter Gifts: Prospect Review

### PRIOR TO PROSPECT REVIEW

- Prepare a list of top donors in the parish.
- If the parish has previously participated in a capital campaign, major gifts from that campaign should be available and should be reviewed along with other names on the top donor list.

### CONDUCTING PROSPECT REVIEW

*Pacesetter Gifts Team: the contents of the meeting are anonymous and confidential. Information exchanged in this meeting will remain confidential and anonymous.*

In the case of every prospective donor:

- Rate and evaluate the ability to give.
- Determine capacity, access, and relevance.
- Identify the best person to make the visit.
- Seek a realistically large — hopefully the maximum — potential gift, providing the donor with an amount or range to pray about.

The Gift Profile shows the Pacesetter Gifts Team what types of gifts are needed. Assign an ask amount to each individual who seems capable of a major gift. The top gift on the gift profile chart isn't a limit. If you feel a parishioner is capable of a larger gift, then suggest a gift amount.

### ASSIGN A TWO-AXIS RANK TO EACH DONOR

- Review each of the names of the top donors to the parish
- First Consider Financial Capacity to Make the Gift:
  - 1** – could probably give at one of the top two gift levels of the Gift Profile chart's first tier.
  - 2** – could probably give at the lower level(s) of the Gift Profile chart's first tier.
  - 3** – Could probably give at one of the top levels of the Gift Profile chart's second tier.
- Next, consider the prospect's potential interest in the project and desire to make a gift.
  - A** – Is committed to the campaign and/or project and will most definitely make a gift.
  - B** – Is somewhat unsure about the campaign or the project, but with information will likely make some gift.
  - C** – Is very unsure about the project and the campaign. Will require much more information and cultivation.



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- Once ranked, assign a gift ask level to each prospect.
  - Consult the chart below to determine where the prospect falls in the priority of contacts to be made.

Once an amount is assigned and a priority set, determine the best possible person to make the visit. This may be a combination of the Pastor, Pacesetter Gifts Leader, Campaign Leader, or some other individual. There needs to be an affinity between the prospect and those making the ask.

After all prospective donors on the list have been reviewed: **are there other names that should be added.** Someone who is not on the top donor list but the team feels might be capable of making a major gift. Review these additional names and assign a gift amount and a potential visitor.

Since the Diocese is conducting a Major Gifts effort, go back to those ranked **1-A**. Could the individual be considered for a larger ask amount, based on the needs of the Diocese. Would the Bishop be the best and most influential person to make the ask?

### **QUESTIONS TO CONSIDER DURING PROSPECT REVIEW**

- What kind of work do they do?
- Are they married?
- Do they have children? Ages? Attend Catholic/private school?
- Where do they live?
- Hobbies?
- Interests as it pertains to the parish?
- Do they volunteer at the church? Past or present? What role do they play?
- Do they give to any other organization or within the community?
- Does anyone know who else might be able to give an opinion on this prospect?
- What would motivate them to give to the campaign?



## Prospect Priority Ranking Chart

**Financial Ability**

<b>1</b>	<b>Top Priority Prospects</b>	<b>Second</b>	<b>Third</b>
<b>2</b>	<b>Tier</b>	<b>Prospects</b>	<b>Tier</b>
<b>3</b>			<b>Prospects</b>

**Interest/Commitment**

**A B C**

*Prospects in the Pink area should be referred to the Advanced Commitment Committee, although those marked as 1-C might still be pacesetter prospects.*



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## PACESETTER PACKET ITEMS

### PACESETTER INFORMATION PACKET

These items should be put into a nice, heavy pocketed folded with their name on it or a 9x11 envelope.

- ☐ Parish/Arch/Diocesan Brochure **OR** Fact Sheet
- ☐ A Question and Answer Sheet
- ☐ Ways of Giving (provided by consultant)
- ☐ (Arch)diocesan AND parish DVDs – (if available)
- ☐ Prayer Card
- ☐ Gift Profile Chart
- ☐ Ancillary Items as needed



## Sample Pacesetter Event Invitation Letter

«GreetingLine»

For several years the leadership of (name of parish) has explored the need for (insert brief description of the project). Based on several factors all indications are that we need to prepare for (need the case fulfills). After much prayer and planning it has been determined that now is the time that we must fulfill these needs.

Thus we are beginning our (name of campaign). As a kickoff to the campaign we are inviting key leaders to a gathering on (date) to learn more about the details and financial needs of this important initiative. As one of those leaders in our parish and community your involvement and support are essential as we prepare for our future.

Please join us as we join hearts and hands to make God's vision for our parish a reality.

**(Date)**

**(Time)**

**(Location)**

**(Refreshments)**

RSPV to \_\_\_\_\_ at \_\_\_\_\_

Sincerely,

Father \_\_\_\_\_



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## Sample Pacesetter Gifts Dinner Invitation

Dear (names),

We are so grateful for our parish, (parish name), its long history and its place in the hearts of all who call it home. Your involvement is important and because of that we want to personally invite you to one of two dinners in our homes on either (dates).

Our parish is one of the first to be a part of the (name of campaign) Capital Stewardship Campaign that is taking place in parishes across (Arch) diocese. This campaign will allow us to strengthen our ability to do ministry and meet the needs of our parish and school for years to come.

The (date) dinner, at \_\_PM, will take place at the \_\_\_\_\_ and the (date) dinner at \_\_PM at the \_\_\_\_\_. These dinners will be intimate with a handful of other parishioners, and Father (name), our pastor, (name), and our consultant from O'Meara Ferguson will join us. We will enjoy food and fellowship together and hear from Father (name) and (consultant name) about our campaign and its importance to our present and future.

One of us will be calling you in the next few days to confirm your attendance. We sincerely hope that you will take time to attend. Financial commitments to our parish will not be taken at the dinners. We will provide information that hopefully will help you understand the campaign and its importance to our parish and (Arch) diocese.

Sincerely,

(names)



Time: \_\_\_\_\_

PG Appendix F (Tracking Sheet)





Last	First	Gift Assess- ment	Solicitor	Date Appointment Call Made	Date Visit 1 Complete	Date Visit 2 Complete	Date Card Returned	Date Thank You Sent	Date Pledge Begins	Pledged	Number Of Years	Down	Promised



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## Sample Handwritten Thank You Note for Pacesetter Visitors

Dear \_\_\_\_\_,

Thank you for welcoming me into your home and for allowing me the time to share with you about the (Name) Campaign. We will be successful because people like you believe that this is important for the future of our parish and arch/diocese for years to come.

May God continue to bless and guide you as you prayerfully consider your (families) expression of faithful stewardship.

God's best to you!

(Pacesetter Visitor)