

# **A Test Campaign**

Venice, FL

## **Pacesetter Leader Guide**



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Your parish's Capital Stewardship Campaign is about people and ministry—people who belong to your parish and are a community of faith as well as the ministry that touches and transforms lives. Every week, many different ministries, led by your pastor, religious and lay leaders make a difference to people in the parish and throughout the diocese, from children through senior citizens. You are a light in your community for the gospel of Jesus Christ.

Ultimately, a capital stewardship campaign allows a parish and arch/diocese to provide the capital that enables ministry to continue and grow. It may be a new Church, a Parish Life Center, the replacement of a roof, new technology for the school, endowing a ministry position, seminary education, tuition assistance or any number of ministry needs. The arch/diocese has identified critical ministry needs, and each parish is asked to do the same. These needs are then outlined in a "Case Statement" that communicates the purpose for the campaign and the impact that the funds raised will have on your community.

Your capital stewardship campaign will be...

**\*Ministry-driven:**

- What is God asking your parish to be and do?
- How will the physical needs that are being addressed provide critical tools for shaping ministries and changing the lives of people?
- How will the campaign inspire people to involve themselves not only in the campaign but also in the overall life of the parish?

**\*Stewardship focused:**

- Based on Scripture and the teachings of the church
- Deepen personal faith so that one's daily life is lived with gratitude for all God's gifts

**\*Involvement oriented:**

- Led by your pastor and lay leaders
- Engaging numerous people to do "just one job" so that no one person becomes overburdened
- Sharing the work of the campaign so that high ownership is created in the parish

**\*Prayer-centered:**

- Inviting every parish family to pray for other parish families in a series of prayer events led by the parish campaign prayer team
- Inviting each family, through prayer, to discern its place in making a sacrificial gift to the identified needs of the parish
- Seeing giving as an *opportunity* rather than an *obligation*



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To succeed in reaching the goal of providing resources for ministry ...

- The pastor and leaders will give direction to the campaign. In larger parishes, some of the positions will require more than one leader
- Many helpers are enlisted to serve with leaders so that no one person is Overburdened and the parish is not hurt as people still continue in regular ministry responsibilities
- Proven strategies are used that blend with the uniqueness of the parish to develop a campaign that is appropriate for the parish at this time
- Resources and training are given over the life of the campaign so that there is a clear roadmap to success
- Homilies, lay stewardship talks, printed and visual materials are developed so that each family is challenged in their spiritual life and engaged in parish life so that a broad and generous response is given to the needs of the parish
- An invitation to give, versus an obligation that is imposed upon parishioners, is promoted by asking each parishioner to pray “Lord, what do You want me to do through me to accomplish Your will for my parish and arch/diocese?”

As a leader in a program that has a bearing on the future ministry in your parish, your personal commitment to be a leader in action and not just in title will be a deciding factor in the ultimate success of this campaign.

Make a commitment to quality leadership.

- Study your Leader’s Guide.
- Complete all of your assignments.
- Set an example for others.
- Attend all possible meetings and be on time.
- Encourage others on the Leadership Team.
- Seek ways to enhance your responsibility by asking, “What can I do to make this better?”

Make a commitment to spiritual leadership.

- Pray for your parish & its leadership
- Pray for the Leadership Team.
- Pray for all who are enlisted.
- Pray for God’s guidance as you accomplish your task.
- Pray that God will show you how to make your financial commitment a meaningful expression of your stewardship.



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## BEGINNING THE PROCESS OF DISCOVERY

You are beginning a journey that will challenge you to grow in many wonderful ways. If this journey is faithfully and properly conducted, it will enable you to make a number of spiritual and practical decisions. The following self-discovery guide and worksheet is designed to help you work toward that destination.

**How can being a disciple of Jesus make an impact on stewardship and giving in this campaign?** According to the U.S. Bishops' pastoral letter on Stewardship, *Stewardship a Disciple's Response*, living as good stewards of God's gifts flows from the fact that we are disciples of Jesus. The beginning of the letter states, "A disciple is a learner and companion of Jesus. As one open to the movement of the Holy Spirit towards a gracious generosity of heart, the authentic disciple regards all he or she is and possesses as gifts and blessings from God . . ."

1. **How can you go to God in prayer to discern His will for your personal life and parish?** For some scriptural suggestions, please read Luke 11:9-10, John 17, and Matthew 6:5-13.
2. **How can you apply Mary's response to God's call to stewardship in your own life?** Scripture is full of references to those who were good stewards. These role models can help us develop our own way of living out our call as disciples. According to the pastoral, "After Jesus, it is the Blessed Virgin Mary who by her example most perfectly teaches the meaning of discipleship and stewardship in their fullest sense. All of their essential elements are found in her life: she was called and gifted by God; she responded generously, creatively and prudently; she understood her divinely assigned role as 'handmaiden' in terms of service and fidelity." (see Luke 1:26-56)

Our Catholic Faith teaches us that we are part of something greater than ourselves. The community of faith offers us the support and nourishment of the Sacraments for our life's journey. We are also aware that we are part of that great Christian Family, the Communion of Saints, all the wonderful people who have gone before us in the faith, and who will come after us.

Every age in Christian history teaches us great lessons of faith and trust and sacrifice. When God's messenger told Joseph not to be afraid to take Mary into his home as his wife, he put aside his fear of the future and made a generous commitment of his very life to Jesus and Mary – because of his faith.

Mother Theresa left a life of teaching in a private academy to care for the poorest of the poor as they lay dying. She sacrificed in order to witness to the love and presence of Jesus.

The pioneer Catholics of our arch/diocese and parish are heroes for us because of their sacrifices. What are we being called upon to do in our time?



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**FIRST . . . How might I give back to God by serving others?**

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*1 Peter 4:10 ...As each one has received a gift, use it to serve one another as good stewards of God's varied grace. (Also see 2 Corinthians 9:8)*

**SECOND . . . What are some reasons that should motivate you to give toward this project?**

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*Sirach 35:10 – Give to the Most High as He has given to you, for the Lord is one who always repay and He will give back to you sevenfold.”(See also: 1 Kings 5:19; Mark 8:2-3; Luke 12:48; Romans 13:7-8; 2 Corinthians 8:11-12)*

**THIRD . . .What attitudes does God like to see demonstrated in your giving?**

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*2 Corinthians 9:7 – Each must do as already determined, without sadness or compulsion, for God loves a cheerful giver.*

*(See also: Exodus 25:1-2, 35:4-5, 20-24, 29; 1 Chronicles 29:17; 1 Corinthians 13:3)*

**FOURTH . . . What does it mean to share sacrificially?**

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*Mark 12:43b-44 – Amen, I say to you, this poor widow put in more into than all the other contributors to the treasury. For they have all contributed from their surplus wealth, but she, from her poverty, has contributed all she had, her whole livelihood.*

*(See also: 2 Samuel 24:24; 1 Chronicles 21:24)*

**FIFTH . . .What does a “sacrificial” commitment require of the giver and what would you be willing to do in order to contribute sacrificially?**

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*2 Corinthians 8:3-5 – For according to their means, I can testify, and beyond their means, spontaneously, they begged us insistently for the favor of taking part in the service to the holy ones, and this, not as we expected, but they gave themselves first to the Lord and to us through the will of God. (See also: 1 Chronicles 29:1-3; Acts 2:44-45, 4:32-37)*

**FINALLY . . . before determining your commitment, consider praying: “Lord, what do You want to do, through me, to accomplish Your will for our parish and the arch/diocese ?”**



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## DISCOVERING WAYS TO GIVE

As you consider your commitment, consider these things:

- SACRIFICE . . .** What does “SACRIFICE” mean to me?  
Your commitment should be built on the theme **“Not Equal Gifts, but Equal Sacrifice.”** Your three-year commitment should be a demonstration of your personal definition of sacrifice.
- PROCESS . . .** What am I willing to do or do without?  
Seek to translate “SACRIFICE” into a plan of action.
- AMOUNT . . .** What kind of commitment will my sacrificial efforts generate during the next three years?

Remember, you will be setting a standard of sacrifice for others to follow. At certain times in our lives we are made more aware of our ministry of good example. What lessons of faith and sacrifice will your offering teach your children, grandchildren and your circle of extended family and friends.

Take a personal inventory — Consider investing from ***as many areas*** as possible.

- PRAYER...** What time and energy can I commit to strengthening my prayer life?
- SERVICE ...** How will I use my Gifts and Talents in the next 3 years?
- INCOME . . .** How will I share my Income?
- ASSETS . . .** What item(s) of value do I own that I can give to my parish (real estate, stocks, bonds, personal possessions, etc.)?
- INCOME PRODUCING:** What income could I dedicate from rental properties, stocks, bonds, certificates of deposit, interest bearing accounts, etc.?
- SACRIFICE . . .** What can I give up, do without, postpone, or alter in order to give to my Parish?

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## POSSIBILITY PLANNING WORKSHEET

How much time to Prayer do I give?

Weekly	Monthly
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How much time to Service do I give?

Weekly	Monthly
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From the monthly budget I could give ...

Weekly	Monthly
Bi-Monthly	Other
Total	

Asset Possibilities

✓	ASSET	VALUE
	Real Estate	
	Stocks	
	Bonds	
	Other Assets	
Total		

Income Producing Assets

✓	ASSET	INCOME
	Rental Properties	
	Stocks	
	Bonds	
	CDs	
	Interest Bearing Accounts	
Total		

Sacrifice .....  
I could do without .....  
Postpone .....  
Alter .....

Total	
POSSIBLE 3-YEAR TOTAL	



# A Test Campaign

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## INITIAL GIFT PROFILE CHART

**\$1,500,000**

**“NOT EQUAL GIFTS, BUT EQUAL SACRIFICE”**

No. Gifts at Level	Gift Level	Total at Level	Cumulative Total
1	\$100,000	\$100,000.00	\$100,000.00
2	\$50,000	\$100,000.00	\$200,000.00
2	\$25,000	\$50,000.00	\$250,000.00
3	\$20,000	\$60,000.00	\$310,000.00
4	\$10,000	\$40,000.00	\$350,000.00
5	\$5,000	\$25,000.00	\$375,000.00
17 Commitments = \$375,000.00 or 25% of Goal			
No. Gifts at Level	Gift Level	Total at Level	Cumulative Total
8	\$15,000	\$120,000.00	\$495,000.00
12	\$12,000	\$144,000.00	\$639,000.00
16	\$10,000	\$160,000.00	\$799,000.00
20	\$7,500	\$150,000.00	\$949,000.00
26	\$5,000	\$130,000.00	\$1,079,000.00
30	\$3,500	\$105,000.00	\$1,184,000.00
35	\$3,250	\$113,750.00	\$1,297,750.00
147 Commitments = \$922,750.00 or 62% of Goal			
164 Commitments = \$1,297,750.00 or 87% of Goal			
No. Gifts at Level	Gift Level	Total at Level	Cumulative Total
10	\$3,000	\$30,000.00	\$1,327,750.00
12	\$2,500	\$30,000.00	\$1,357,750.00
15	\$2,000	\$30,000.00	\$1,387,750.00
18	\$1,500	\$27,000.00	\$1,414,750.00
20	\$1,250	\$25,000.00	\$1,439,750.00
24	\$1,000	\$24,000.00	\$1,463,750.00
Many	\$500 or less	\$36,250.00	\$1,500,000.00

99 Commitments = \$202,250.00 or 13% of Goal

263 Commitments = \$1,500,000.00 or 100% of Goal



# SEPTEMBER

2013

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 <i>Labor Day</i>	3 3 pm Campaign Admin. & Involvement Ldr 5:30 pm Pastor & Campaign Chrs. 6 pm Print/Visual Mtg. 7 pm <b>Train Leadership Team</b> 8 pm Advance Commitment/ Pacesetter Gifts #1	4	5	6	7 Introduce Leadership Team  Distribute Special Edition Newsletter at Masses
8 Introduce Leadership Team  Distribute Special Edition Newsletter at Masses	9	10	11	12	13	14
15	16	17 5:30 pm Print/Visual Comm. Mtg. #2 6:15 pm Contact Team Assts. 7 pm <b>Leadership Team Report Mtg. #1</b> 8 pm Pace Setter Gifts Mtg.#2/ Adv Commit. Mtg#2	18	19 Fact Sheet due to printer	20	21
22 Awareness Gathering	23	24	25	26 Brochure due to printer	27	28
29	30					



OCTOBER

2013

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4 Fact Sheet mailed by printer	5
6	7	8 5:30 pm Pastor & Campaign Chrs 6 pm Train Info. Team 6:30 pm Train Contact Team 7:30 pm <b>Leadership Team Report Mtg. #2</b> 8:30 pm AC Mtg. #3/ Pacesetters	9	10	11 Brochure delivered to parish by printer  Parish-wide Event Invitation due to printer	12
13	14 <b>Columbus Day</b>  Newsletter due to printer	15 Parish mails Advance Commitment Invitations	16	17	18	19 Distribute Information Packets
Information and Prayer Calls -- October 14 – 19						
20 Distribute Information Packets	21	22 5 pm Follow-up Mtg 6 pm Pacesetter Gifts Report Mtg 7 pm LT Report Mtg. #3 8 pm Advance Commitment Host Orientation	23 Parish mails remaining Info Packets	24	25 Parish-wide Event Invitation mailed by printer	26 <b>Weekend I</b> Announce Goals Pastor's Stewardship Talk Poster Festival Attend Meeting to Answer Questions
Advance Commitment Gathering Calls -- October 22 - 31						
27 <b>Weekend I</b> Announce Goals Pastor's Stewardship Talk Poster Festival Attend Meeting to Answer Questions	28 Newsletter mailed by printer	29	30	31		
Advance Commitment Gathering Calls -- October 22 - 31						

**NOVEMBER****2013**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
•	•	•	•	•	•	•
					<b>1</b>	<b>2</b> <b>Weekend II</b> Homily Stewardship Talk Youth Involvement Weekend
<b>3</b> <b>Weekend II</b> Homily Stewardship Talk Youth Involvement Weekend	<b>4</b>	<b>5</b> 7 pm Advance Commitment Gathering	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b> <b>Weekend III</b> Homily Stewardship Talk
<b>Parish Event Invitation Calls – November 4 - 9</b>						
<b>10</b> <b>Weekend III</b> Homily Stewardship Talk	<b>11</b>	<b>12</b>	<b>13</b>	<b>14</b>	<b>15</b>	<b>16</b> <b>Commitment Weekend</b> Homily Stewardship Talk Parish-wide Event
<b>17</b> <b>Commitment Weekend</b> Homily Stewardship Talk Parish-wide Event	<b>18</b>	<b>19</b>	<b>20</b> Parish mails remaining commitment cards	<b>21</b>	<b>22</b>	<b>23</b> <b>Commitment Weekend II</b> Homily Stewardship Talk
<b>24</b> <b>Commitment Weekend II</b> Homily Stewardship Talk	<b>25</b>	<b>26</b>	<b>27</b>	<b>28</b> <i>Thanksgiving Day</i>	<b>29</b>	<b>30</b> Continue to receive Commitments at Mass

**DECEMBER****2013**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<b>1</b> Continue to receive Commitments at Mass	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b> Continue to receive Commitments at Mass
<b>8</b> Continue to receive Commitments at Mass	<b>9</b>	<b>10</b>	<b>11</b>	<b>12</b>	<b>13</b>	<b>14</b> Continue to receive Commitments at Mass
<b>15</b> Continue to receive Commitments at Mass	<b>16</b>	<b>17</b>	<b>18</b>	<b>19</b>	<b>20</b>	<b>21</b> Continue to receive Commitments at Mass
<b>22</b> Continue to receive Commitments at Mass	<b>23</b>	<b>24</b>	<b>25</b> <i>Christmas</i>	<b>26</b>	<b>28</b>	<b>28</b> Continue to receive Commitments at Mass
<b>29</b> Continue to receive Commitments at Mass	<b>30</b>	<b>31</b>				
Celebration Calls – Dec 29 – Jan 4						

**JANUARY****2014**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
•	•	•	•	•	•	•
			1 <i>New Year's Day</i>	2	3	4 <i>Epiphany</i> Celebration Weekend
			Celebration Weekend Reminder Calls – Dec 29 – Jan 4			
5 <i>Epiphany</i> Celebration Weekend	6	7	8 Parish mails Thank-you notes to those making commitments	9	10	11
12	13	14	15	16	17	18
19	20 <i>Martin Luther King Day</i>	21	22	23	24	25
26	27	28	29	30	31	



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## LEADERSHIP TEAM AND LEADERS

The Leadership Team is the core group of leaders in the campaign. A leader or co-leader(s) represents each function during the campaign.

### **ADVANCE COMMITMENT LEADER(S)**

The Advance Commitment Leader is asked to plan and direct a series of Gatherings that can be held at the parish, in the homes of parishioners, or some other location. The purpose of these Gatherings is to ask leaders in the parish to consider making their commitments prior to Commitment Weekend to set the pace for success.

### **CAMPAIGN ADMINISTRATOR(S)**

The Campaign Administrator will work closely with the pastor, your consultant, and the Campaign Chair. Responsibilities include:

- Scheduling arrangements for meetings
- Assigning phone calls and/or visits
- Coordinating all campaign mailings (as applicable)
- Tabulating all reservations and acknowledgments to appropriate leaders.
- Collating materials for all campaign training meetings and activities

### **CAMPAIGN CHAIR(S)**

The Campaign Chair serves in a general leadership capacity for the campaign. The chair will:

- Help moderate Leadership Team meetings
- Be available to support team leaders
- Serve as liaison between team leaders and consultant
- Make public announcements related to the campaign
- Represent the Leadership Team in other communications
- Represent the campaign to all parish teams and ministries
- Set an example for leadership

### **CHILDREN'S ACTIVITY LEADER(S)**

The Children's Activity Leader is responsible for the planning and implementation of activities and learning opportunities during the course of the campaign. The leader will:

- Oversee all plans and arrangements for the Children's Activity during the Parish-Wide Event
- Develop and implement a Poster Festival or some other type of activity for children
- Prepare children's teachers to teach stewardship lessons on giving





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### **CONTACT LEADER(S)**

The Contact Team will be responsible for making phone calls to every parish household at three key times to support the activities of the campaign. This is the largest campaign team—allowing for many people to each do a small task to get a big job done. The purpose of the calls will be to:

- Call 1—Provide instruction to each household regarding the information activity of the campaign.
- Call 2—Encourage attendance at the Special Event and receive reservations, if needed.
- Call 3—Remind each household to return its Commitment Card prior to Celebration Weekend.

None of these calls will involve asking for money or pledges.

### **EVENT LEADER(S)**

The Parish-Wide Event Leader is responsible for all plans and arrangements related to the Parish-Wide Event scheduled in conjunction with Commitment Weekend (with the exceptions of the program). The Leader is asked to participate in the decision related to type of event; to make arrangements for the facility, food, decorations; and to oversee the event.

### **FOLLOW-UP LEADER(S)**

The Follow-Up Leader is responsible for the maintenance of the campaign through the three-year giving period. The leader is asked to:

- Create a three-year calendar for follow-up
- Keep the campaign visible and fresh through regular communications to the parishioners
- Develop and implement activities to introduce new parishioners to the campaign
- Work to keep the stewardship emphasis before the parishioners

### **INFORMATION LEADER(S)**

The Information Team is responsible for selecting and developing a plan to disseminate information to every household. One of several activities (or combination of activities) may be used, such as:

- Distribution of information packets after Mass (may include a video)
- Other information dissemination strategies chosen by leaders



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### **INVOLVEMENT LEADER(S)**

Involvement of people through enlistment is key to the success of a campaign. The Involvement Leader works with all teams to coordinate Involvement. Primary duties include:

- Monitor involvement for each leader and team
- Provide teams up-to-date lists of people available for involvement
- Alert leaders when involvement falters
- Provide help to those having difficulty in Involvement

### **PACESETTER GIFTS LEADER(S)**

The objective of the Pacesetter Gifts Leader is to identify those who may have the ability to make commitments at the highest levels needed for the success of the campaign. In addition, these leaders will implement strategies for individual visits to ask these individuals to prayerfully consider making that commitment.

### **PRAYER LEADER(S)**

The Prayer Leader will develop a prayer support team that will pray on a regular basis for campaign activities, Leadership Team members, and major campaign events. In addition, a parish-wide prayer emphasis may be planned to take place during the Inspiration Phase of the campaign.

### **PRINT COMMUNICATIONS LEADER(S)**

The Print Communications Leader is responsible for the development of all printed material used in the campaign. The Print Communications Team will manage the production of all material and any printing arrangements that are needed.

### **VISUAL COMMUNICATIONS LEADER(S)**

The Visual Communications Leader is responsible for the development and duplication of a short visual presentation that is to be used in the Information Activity. This is an optional activity.

### **YOUTH LEADER(S)**

The Youth Leader(s) is responsible for planning and organizing all activities that involve the youth, 7th-12th grade, of the parish. These activities may include:

- Youth Prayer Activity
- Youth Involvement Activity
- Youth Commitment Event
- Youth Involvement in Parish-Wide Event

The Youth Activity Leader(s) will enlist a team to help with these activities.



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## INVOLVEMENT TABLES

Enlistment takes place in either two or three stages. These stages are outlined below.

1. The pastor enlists leaders for the Leadership Team
2. Each leader enlists a certain number of assistants
3. In some cases, each assistant enlists a certain number of members

Only the Contact Team will enlist both assistants and members. All the other groups will only enlist assistants.

The following five teams should enlist the number of assistants and members according to the tables below. All other team leaders will enlist assistants according to their own team tasks and needs. Please seek the advice of your consultant if you have questions regarding the size of your team.

<b>Contact Team - 3 Levels of Enlistment</b>	
Number of Leaders	3
Each Leader Enlists	4 Assistants
Total Team Assistants	12
Each Assistant Enlists	4 Members
Total Members	48
Total Team	51
<b>Information Team - 2 Levels of Enlistment</b>	
Number of Leaders	4
Each Leader Enlists	3 Assistants
Total Team Assistants	12
Total Team	16



<b>Parish-Wide Event Team - 2 Levels of Enlistment</b>	
Number of Leaders	5
Each Leader Enlists	6 Assistants
Total Team Assistants	30
Total Team	35
<b>Children's Activities Team - 2 Levels of Enlistment</b>	
Number of Leaders	2
Each Leader Enlists	9 Assistants
Total Team Assistants	18
Total Team	20
<b>Advance Commitment Team - 2 Levels of Enlistment</b>	
Number of Leaders	2
Each Leader Enlists	6 Assistants
Total Team Assistants	12
Total Team	14



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## **PACESETTER GIFTS LEADERS**

The Pacesetter Gifts Leader is responsible for identification, review and development of appropriate strategies to challenge those people in the parish whose financial capacity and personal passion for the ministry of Jesus can have an impact on the parish's and arch/diocesan's projects in extraordinary ways.

### **Responsibilities:**

- Attend Leadership Team Training, Leadership Team Report meetings and Pacesetter Team meetings
- Attend Advance Commitment Gatherings
- Prospect Review
  - Build a team for Prospect review
  - Provide input in Prospect Review
  - Strategize best approaches to prospects
- Prospect Visits
  - Build a team to conduct pacesetter visits
  - Orient visitors
  - Manage a small number of prospects
  - Move/manage assigned prospects through the following steps:
    1. Get the appointment
    2. Make "the ask"
    3. Engage in follow-up conversations
    4. Receive the commitment cards
    5. Send thank you notes
- Publicly support the campaign for the parish and archdiocese
- Prayerfully consider a sacrificial, financial commitment to the campaign



**\*\*MEETINGS YOU SHOULD ATTEND\*\***

<b>October 29, 2013</b>	<b>7:00 PM</b>	Leadership Team Training Pacesetter Gifts Meeting #1
<b>December 02, 2013</b>	<b>7:00 PM</b>	Leadership Team Report Meeting #1 Pacesetter Gifts Meeting #2
<b>December 09, 2013</b>	<b>7:00 PM</b>	Leadership Team Report Meeting #2 Pacesetter Gifts Meeting #3
<b>December 16, 2013</b>	<b>7:00 PM</b>	Leadership Team Report Meeting #3
<b>December 20, 2013</b>	<b>7:00 PM</b>	Advance Commitment Gathering #1
<b>December 28 - 29, 2013</b>		<b>Commitment Weekend &amp; Parish-Wide Event</b>

**- Timetable For Completing Your Tasks -**

**October 29, 2013**

**Leadership Team Training and Individual Team Meetings**

- Attend Leadership Team Training - **7:00 PM**
- Review your workbook and place the dates and times of the meetings you will attend on your personal calendar
- Attend Pacesetter Gifts Meeting #1 - Orient and Calendar Pacesetter Gifts Process -
  - Review process and due dates with your consultant (Appendix A)



### **Between Leadership Team Training and Report Meeting #1 on December 02, 2013**

- Meet with the Pastor to obtain lists of individuals who could potentially make Pacesetter Gifts to the campaign
- Prospect Review—Meet with Pastor, Campaign Chair(s) and select group of 6-8 knowledgeable parishioners to identify Pacesetter Prospects (Appendix B)
- Begin identifying and recruiting Pacesetter Solicitors
- Finalize with Pastor and Campaign Chair(s) the project details and costs
- Determine dates for Pacesetter Awareness Gatherings (Optional)

## **December 11, 2013**

### **Leadership Team Report #1 and Individual Team Meetings**

- Attend Leadership Team Report Meeting #1 - 7:00 PM
  - Report on progress and plans
- Attend Pacesetter Gifts Meeting #2 -
  - Report on Pacesetter Prospect List
  - Report on potential/actual Pacesetter Solicitors
  - Strategize for best ways to approach Pacesetter Prospects—Awareness Events/individual visits
  - Discuss Prospect Information Packet (Appendix C)

### **Between Leadership Team Report #1 and Leadership Team Report #2 on December 09, 2013**

- Prioritize list of Pacesetter Prospects
- Finalize list of Pacesetter Solicitors, recruit them, and inform them about upcoming Pacesetter Solicitor Training
- Work on contents of Prospect Information Packet (Appendix C)
- If scheduled prepare and mail invitations to Pacesetter Awareness Gathering or dinner (Appendix D & E)



## **December 09, 2013**

### **Leadership Team Report #2 and Individual Team Meetings**

- Attend Leadership Team Report Meeting #2 - **7:00 PM**
- Attend Pacesetter Gifts Meeting as requested by Consultant
  - Finalize Pacesetter Gifts goal
  - Train solicitors
  - Finalize Awareness Event dates, location, food, hosts, agenda (**Optional**)
  - Assign Pacesetter Prospects to Pacesetter Solicitors

### **Between Leadership Team Report #2 and Leadership Team Report #3 on December 16, 2013**

- If scheduled, attend Pacesetter Awareness Gathering \_\_\_\_\_
- If necessary, finish assigning Pacesetter Prospects to Pacesetter Solicitors
- Complete Prospect Information Packet
- Begin making appointments, information visits, pledge visits
- Track each Pacesetter Prospect in the process (Appendix F)

## **December 16, 2013**

### **Leadership Team Report #3 and Individual Team Meetings**

- Attend Pacesetter Gifts Meeting #3 -
  - Report on pacesetter process and where each prospect is in the process
  - Develop a strategy, timetable and plan, to conclude any work that is not completed
  - Make plans for Pacesetter Prospects who are out of town/unreachable
- Attend Leadership Team Report Meeting #3 - **7:00 PM**
  - Report on progress and plans





### **Following Leadership Team Report #3**

- Continue making pacesetter visits
- Continue tracking of Pacesetter Prospects
- Finalize plans for pacesetters who are out of town/unreachable
- Send personal "thank-you" notes to each pacesetter visited (Appendix G)

## **December 20 - 7:00 PM**

### **Advance Commitment Gathering**

- Plan to attend Advance Commitment Gathering

## **December 28 - 29, 2013**

### **Commitment Weekend**

- Plan to attend a Commitment Weekend Mass. Do not neglect the privilege of worshipping this week!  
If you have not done so, prayerfully complete your commitment card
- Continue to support your parish and the campaign in your own prayers

## **January 04 - 05, 2014**

### **Attend a Celebration Weekend Mass**

*"Thank you for making a difference in the life of your parish and in the success of this campaign."*



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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.



- 
- 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

1	Top Priority Prospects	Second	Third
2	Tier	Prospects	Tier
3			Prospects

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,

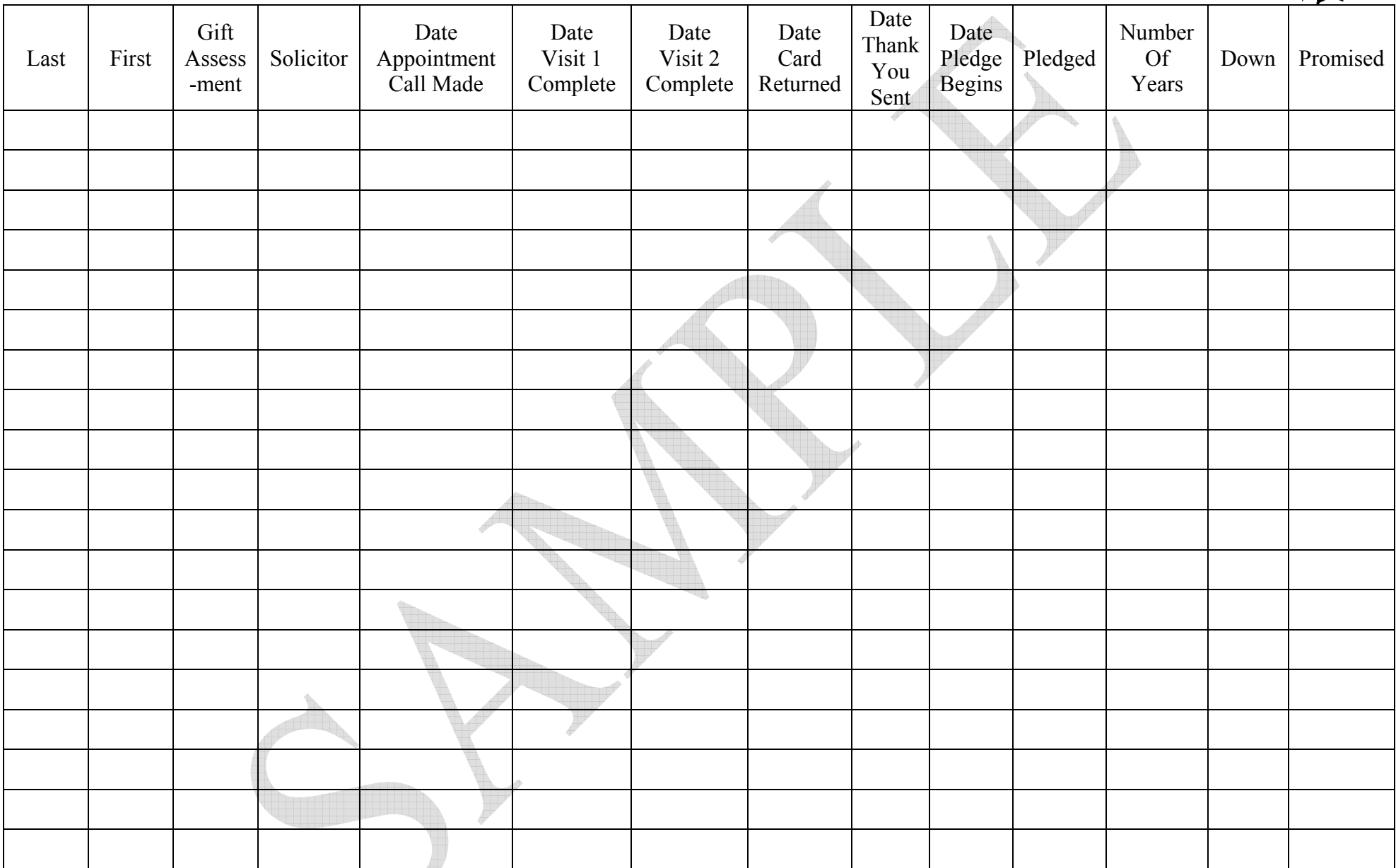
(names)





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

PG Appendix F (Tracking Sheet)





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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)



## EVALUATION OF GIVING POTENTIAL

In order to raise **\$1,500,000**, major gifts in the following categories are usually given. We need to determine if giving potentials exist in your parish. If you know of those who could possibly give three-year commitments in the following ranges, please identify them by name for your consultant. Your suggestions will be held in confidence and will not obligate you or those whom you name. Thank you for your wisdom, assistance, and support.

\$100,000

- |          |          |          |
|----------|----------|----------|
| 1. _____ | 2. _____ | 3. _____ |
| 4. _____ | 5. _____ | 6. _____ |

\$50,000

- |          |          |          |
|----------|----------|----------|
| 1. _____ | 2. _____ | 3. _____ |
| 4. _____ | 5. _____ | 6. _____ |
| 7. _____ | 8. _____ | 9. _____ |

\$25,000

- |           |           |           |
|-----------|-----------|-----------|
| 1. _____  | 2. _____  | 3. _____  |
| 4. _____  | 5. _____  | 6. _____  |
| 7. _____  | 8. _____  | 9. _____  |
| 10. _____ | 11. _____ | 12. _____ |

\$20,000

- |           |           |           |
|-----------|-----------|-----------|
| 1. _____  | 2. _____  | 3. _____  |
| 4. _____  | 5. _____  | 6. _____  |
| 7. _____  | 8. _____  | 9. _____  |
| 10. _____ | 11. _____ | 12. _____ |

Please complete your evaluation as soon as possible and return it to your O'Meara Ferguson consultant, Brendon McDonnell.

O'MEARA FERGUSON