

Successful Annual Appeals for the Small Office

Presenters:

Jill McNally, Diocese of Madison, Wisconsin
Ron Schatz, Diocese of Bismarck, North Dakota

Jill McNally

- Director of Stewardship and Development
- 10 years with the Diocese of Madison
- Instrumental in implementing the Annual Catholic Appeal in 2009 as well as the Priests for Our Future Capital Campaign in 2014



Ron Schatz

- Director of Stewardship and Resource Development
- 26 years with the Diocese of Bismarck
- Most of those years, Ron was a one-person shop. Ron also assists the Catholic Indian Mission on the Standing Rock Indian Reservation with their nationwide, direct mail fundraising.



Speakers



Diocese of Madison

- Established in 1946
- Serves 11 counties in Southwest and South Central Wisconsin.
- 104 parishes
- 44 Catholic elementary schools
- 3 Catholic high schools
- 1 Catholic college
- 285,277 Catholics



Diocese of Bismarck

- Established in 1909
- Serves 23 counties in western North Dakota
- 98 parishes and missions
- 10 Catholic elementary schools
- 3 Catholic high schools
- 1 Catholic college
- 61,862 Catholics

Diocese of Madison Annual Catholic Appeal



- Began in 2009
- Two employees in department
- Built our first robust diocesan database
- Created processing procedures
- Relied on a consultant to guide us through our first appeal
- Asked ourselves – what can we do in-house versus outsource and why

Appeal History


Diocese of Bismarck Annual God's Share Appeal

- Began in 1958 (\$155,360 raised)
- 2017 - 60th Anniversary (\$3,314,402 raised)
- 3¼ employees in department

Appeal History

**Diocese of Madison
Annual Catholic Appeal**

- \$3,200,000 Goal
- \$3,450,000 Raised
- 16,632 Donors
- 25% Participation Rate
- \$204.00 Average Gift









Appeal Statistics

**Diocese of Bismarck
Annual God's Share Appeal**

- \$3,257,000 Goal
- \$3,314,402 Raised
- 10,451 Donors
- 47.5% Participation Rate
- \$317.17 Average Gift

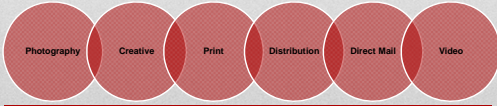
Appeal Statistics

What can I outsource?

 Direct Mail/ Thank You's	 Gift Processing
 Graphic Design	 Storage/ Scanning
 Printing	 Distribution

Consider a partner that can be a “one-stop-shop” versus hiring multiple vendors

- In 2009 we were using 6 different vendors
- In 2012 we started eliminating different vendors
- In 2016 we are now only using 2 vendors



Management

Copyright

What to keep in-house?


Art Direction

Gift Processing

This is what we do in-house

- Manage the overall process
- Copyright
- Some gift processing
 - Import of pledges/payments
 - Bank check and unusual gift processing
- Work closely with our vendors
- Allows more time to meet donors
- Work on training events and donor relationship/recognition events






Staffing

Ask some questions

- How much staff do I have?
- Is my staff capable of doing the work?
- How much work can my staff take on?
- Do you need to customize a job around your staff?



Make a list of your staff

- Do you have the right people in the right seat on the right bus?

Know your strength and weakness areas
Hire accordingly






Staff correctly

- Where do you need the most help?
- Cross train your employees
- Find the right staff, you can always customize the job to a good employee

Utilize internal departments that can help

- Communications
- Computer Support
- Down-time Employees



Ask yourself some questions

- Is it smarter to outsource or hire employees?

Review your budget

- If we keep work in-house/hire employees, what additional resources will we need
 - Storage for pledge cards
 - Computer equipment
 - Training
 - Salaries and benefits (what is the return on investment)



If you don't have an appeal budget, make one!

- Breakout each area (i.e. print/design, video, postage, donor recognition, etc.)

Consider adding your appeal expenses to your overall case statement – be transparent



Annual Catholic Appeal

PLEDGED vs PAID			
Year Donors Pledged	Exemption	Year Pledged	
Exemption Rate		Year Paid	
		Exemption	

SOLICITATIONS			
Solicitations		Donor Rate	Pledge/Paid
Direct Mail	Direct Mail	Direct Mail	Direct Mail
Phone	Phone	Phone	Phone
Postcard	Postcard	Postcard	Postcard
Follow Up	Follow Up	Follow Up	Follow Up
Exemption	Exemption	Exemption	Exemption
Total	Total	Total	Total

DONOR ENGAGEMENT			
Engaged Donors	New Donors	Engaged Donors	
Engagement Rate	Engagement Rate	Engagement Rate	


RESULTS BY CONSTITUENCY			
Diocese	Diocese	Average Pledge	
Diocese of Albany	Diocese of Albany	Diocese of Albany	
Diocese of Buffalo	Diocese of Buffalo	Diocese of Buffalo	
Diocese of Rochester	Diocese of Rochester	Diocese of Rochester	
Total	Total	Total	

CONSECUTIVE YEAR DONORS			
Donors 1 Year			
Donors 2 Years			
Donors 3 Years			


GIVING LEVELS			
Diocese	Diocese	Average Pledge	
Diocese of Albany	Diocese of Albany	Diocese of Albany	
Diocese of Buffalo	Diocese of Buffalo	Diocese of Buffalo	
Diocese of Rochester	Diocese of Rochester	Diocese of Rochester	
Total	Total	Total	

ROI and CBO				
Diocese	Expenses	Revenue	Net Revenue	ROI
Diocese of Albany	Diocese of Albany	Diocese of Albany	Diocese of Albany	
Diocese of Buffalo	Diocese of Buffalo	Diocese of Buffalo	Diocese of Buffalo	
Diocese of Rochester	Diocese of Rochester	Diocese of Rochester	Diocese of Rochester	
Total	Total	Total	Total	

RETURN ON INVESTMENT (ROI)
COST TO RAISE A \$ (CBO)



**Delegate the work
Manage the process**



Start your creative process early to avoid last minute stress

- Appeal is conducted during Lent
- Start planning meetings in August

Schedule

CAMPAIGN NAME	Campaign Item	Prior Completion Date	Ship/Mail Date	In Parish/Home Date	Creative Files	Date/Ship to
2017 ACA - Mailing	Brochure	2/17/2017	2/17/2017	2/28/2017	1/27/2017	1/30/2017
	#9	2/17/2017	2/17/2017	2/28/2017	1/27/2017	1/30/2017
	5x9.5 Envelope	2/17/2017	2/17/2017	2/28/2017	1/27/2017	1/30/2017
2017 ACA - Parish Material	Tabloid	2/13/2017	2/28/2017	2/21/2017	1/27/2017	
	In-Pew Envelope	2/13/2017	2/28/2017	2/21/2017	1/28/2017	
	Poster	2/13/2017	2/28/2017	2/21/2017	1/27/2017	
	Spanish Flyer	2/13/2017	2/28/2017	2/21/2017	1/27/2017	

SH ORDER DATE: 1/18/17
 SHIP DATE: 1/18/17
 CLOSE DATE: 1/18/17
 PRINT DATE: 1/18/17

Questions?

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