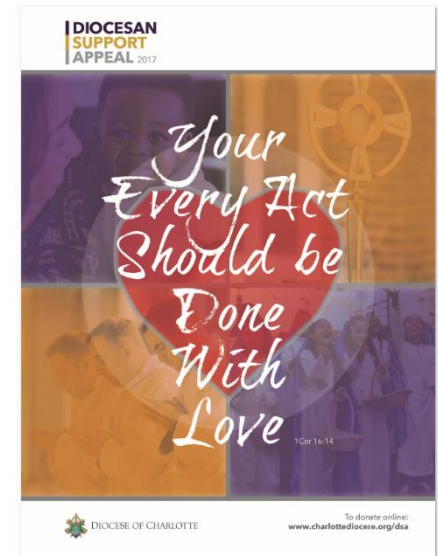


# Fundamentals of a Diocesan Annual Appeal

Presented by:

Jim Kelley  
Diocese of Charlotte, NC

# Diocesan Annual Appeals Done Under the Umbrella of Stewardship



**“As your Bishop, I humbly ask you prayerfully to consider making a contribution to the 2019 Diocesan Support Appeal. Please take the time to reflect on your own blessings and return a portion of these gifts to help your brothers and sisters in our diocese who are served by our ministries, programs and services. We are called to respond to Jesus’ presence in our lives by serving others.”**



# Steps to Successful Implementation

- Data Management
- Goal Setting & Rebates
- Preparation & Pre-Campaign Planning
- Promotion & Training
- Solicitation
- Follow-up & Donor Retention
- Evaluation
- Results
- Staffing

# Database & Gift Entry

- Choice of program/software
- Source of Data – Data census entering
- Determine who is sent mailing
- Gift Entry – in-house or lockbox
- In pew pledge processing

# Determining an appeal goal

- Is it a goal or an assessment?
- Collaborative effort could include: CFO, Chancellor, Diocesan Finance Council, Agency Directors, Deans, Development Officer
- Achieving diocesan needs with appropriate and achievable targets for parishes

# Rebates – Yes or No?

- Nearly 60% of diocesan offices have rebates and “strongly agree” that their parishes support the annual appeal process.
- Parishes see direct benefit.
- Parishes incorporate appeal into ongoing stewardship efforts.
- Why not offer a rebate?

# Statement of Case

- Arlington's case remains basically the same each year with the appeal funding supporting the main programs, offices and ministries of the diocese such as: Vocations, Evangelical Efforts, Multicultural Ministries, Office for Family Life, Catholic Charities, Virginia Catholic Conference, Youth Ministry and others.
- Charlotte's case is typically the same each year with ministries funded falling into categories of Education, Vocations, Multicultural, Catholic Charities, Diocesan Housing Ministry and Eucharistic Congress.
- Some dioceses have no Cathedraticum and the appeal funds all programs and ministries as well as diocesan administrative offices.

# Parish Based Campaign

## Raleigh - Bishop's Annual Appeal (BAA)

- Diocesan Steering Committee
- Diocese provides all marketing materials
- Campaign run at parish level
- Local appeal by pastors, pastoral administrators and fellow parishioners
- Potential for large number of volunteers
- Local follow up



# Diocesan Based Campaign

## Charlotte - Diocesan Annual Appeal (DSA)

- Diocese provides all marketing materials
- Campaign run at diocesan level with local support
- Diocesan appeal by Bishop followed by local appeal by pastors, pastoral administrators and fellow parishioners
- Diocesan follow up with local support

Develop  
comprehensive  
plan with  
guidebook  
given to  
parishes

**DIOCESAN**  
**SUPPORT**  
**APPEAL** 2017



A Resource Manual  
for  
Pastors and Parish DSA Coordinators  
Diocese of Charlotte

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# Parish Tools

- Training sessions held in various parishes throughout the diocese
- Parish Leadership Manual and Presenter Manual given to parishes to help guide them through the campaign
- Some materials distributed at kick-off meetings, some materials available online for parishes to download
- Video (English and Spanish and CC)

# Communication/Publicity to parishes

- Diocesan Level
  - Weekly parish report
  - Weekly email with special announcements and suggested weekly bulletin announcements
  - Phone/Emails for individualized attention
  - Special bulletin inserts (3 times/year) in an email and downloaded from website

# Communication/Publicity

- Diocesan Level
  - Newspaper
    - Stories and Updates on Campaign
    - Tag articles during year for areas supported
  - Video
  - Pledge Reminder
    - With a buck slip
  - Website
    - Information on appeal for parishes to download
    - Videos
    - Ways to Give

# Communication/Publicity to parishioners

- Diocesan Level
  - Prayer Request Card



Dear Bishop Jugis,  
Please remember my/our intentions in your prayers  
during the coming year.

NAME \_\_\_\_\_

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# Communication/Publicity to donors

- Diocesan Level

- Planned Giving Card

- Insert PG brochure in PIF acknowledgment letters



## Charitable Gifts Through Your Will and Estate Planning

In making a bequest through your will or a gift in your estate plan, you can continue long-standing church support.

I would consider naming  my Parish and/or  The Diocese of Charlotte and/or  The Foundation in my will or estate plan. Please send me information on making a bequest gift as part of my estate plan.

I have already named my Parish and/or The Diocese of Charlotte and/or The Foundation in my will or estate plan.

Please send me information on the Catholic Heritage Society — the Diocese's way of honoring those who remember the church in their wills and estate plans.

NAME *(please print)* \_\_\_\_\_

ADDRESS \_\_\_\_\_

\_\_\_\_\_

# Appeal Brochure Development

- Make it appealing and visual to all constituents
- Impart stewardship message
- Demonstrate benefits
  - Diocesan Programs
  - Parish Needs
- Provide Vignettes/personal quotes
- Utilize Compelling Photos

# Including Our Multicultural Brothers & Sisters

- Be flexible
- Recruit Chairperson for Spanish speaking parishioners
- Use Bilingual materials
  - Manual, Posters, Bulletins, Brochures, Letters
- In-pew appeal
- Working through Multicultural Ministries or Spanish Apostolate Office
- **Don't be afraid to ask!**



# Methods of Asking for the Gift

- Personal Asks
  - Major Gifts
    - 22% Pledge >50%
- Direct Mail
  - Segmented ask based on last gift
  - Targeted Letter
  - Personally signed
  - Digitized signature-Bishop, Pastor
  - Matching gift insert (ARL)
- Lay Presenter/In-pew Appeal
- Online Gifts
- Receptions/Dinners
- Email Blasts






# 3 Pulpit Opportunities

- Announcement Weekend – announce the campaign is beginning and the video will be shown the next weekend. Provide a script to parishes.
- Appeal Weekend #1 – Pastor
- Appeal Weekend #2 – Lay Presenter (from supported ministry, or a vested parishioner)

# Announcement Weekend

- Appeal begins this week
- What the appeal supports (types of ministries, programs)
- Let parishioners know they will receive information in the mail
- Let parishioners know the video will be shown next week
- Encourage parishioners to pray for the success of the Appeal

*“We are His Hands,” is the theme of the 2019 Diocesan Support Appeal. This week, you should receive a letter or postcard from Bishop Jugis asking for your generous support of the DSA; and next weekend we will view the DSA video, so we can all have an understanding of how the funds given to the DSA impact our diocese. Bishop Jugis asks each of us to prayerfully consider a gift to the DSA as a way of serving Christ through service to thousands of Catholics in western North Carolina.”*



We recommend **TWO** back  
to back In-Pew Appeal  
Weekends

# Sample In Pew Envelopes

**DIOCESAN  
SUPPORT  
APPEAL 2016**

*Whatever you do...*

Your participation in the 2016 Diocesan Support Appeal will impact the lives of thousands of people throughout the Diocese of Charlotte through programs and ministries that reach beyond the scope of any individual parish.

OUR COLLECTIVE GIFTS MAKE THESE PROGRAMS POSSIBLE.

**I am pleased to join in support of the Diocesan Support Appeal!**

First Name \_\_\_\_\_ Last Name \_\_\_\_\_  
Spouse's Name \_\_\_\_\_ Telephone \_\_\_\_\_ circle: home /cell \_\_\_\_\_  
Email \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_  
Please credit my gift to the following parish: (Parish Name) \_\_\_\_\_

I have already sent my DSA Pledge by mail  on line  
(Please **Do Not** fill in the pledge box area on the right.)  
 I am unable to make a gift to the DSA at this time.

For parish office use only:  
Diocesan ID # \_\_\_\_\_  
 New  Visitor

**Suggested Pledge** - may be paid in monthly installments ending in Dec.  
 \$2,000  \$1,500  
 \$1,200  \$1,000  
 \$800  \$600  
 \$400  \$200  
 Other \_\_\_\_\_

Total Amount Pledged: \$ \_\_\_\_\_  
Amount Enclosed: \$ \_\_\_\_\_  
 Cash  Check # \_\_\_\_\_  
**Please make checks payable to DSA**  
Balance to be Paid: \$ \_\_\_\_\_  
You will receive monthly reminder statements for your pledge balance.



# Sample In Pew Envelopes



## OUR CATHOLIC APPEAL

for our people, our ministries, our future

Affix Label Here  
(for Parish use only)

*For Office Use Only*

▲ Check # \_\_\_\_\_

▲ Check Date \_\_\_\_\_

Please print legibly and return this envelope to your Parish. (Do not Mail!)

I have already made my gift.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Donor Signature: \_\_\_\_\_

You may also give by:     See inside for details.

### Suggested Pledge

#### Corpus Christi Society

<input type="checkbox"/> \$25,000	\$2,500
<input type="checkbox"/> \$20,000	\$2,000
<input type="checkbox"/> \$15,000	\$1,500
<input type="checkbox"/> \$10,000	\$1,000

#### Lumen Christi Society

<input type="checkbox"/> \$7,500	\$750
<input type="checkbox"/> \$5,000	\$500
<input type="checkbox"/> \$2,500	\$250

#### Other Gift Levels

<input type="checkbox"/> \$1,800	\$180
<input type="checkbox"/> \$1,200	\$120
<input type="checkbox"/> \$600	\$60
<input type="checkbox"/> \$366	\$36.60
<input type="checkbox"/> \$ _____	\$ _____

**Total Pledge:**      **Down Payment:**      **Remaining Balance:**  
 \$ \_\_\_\_\_      \$ \_\_\_\_\_      \$ \_\_\_\_\_

Please make checks payable to **Our Catholic Appeal**.



# Make It Easy To Give

- Cash
- Check
- Credit Card Charge
- Direct Debit Charge
- Stock transfer
- Matching Gifts
- On-line giving
  - Pledging online
  - Credit Card or Direct Debit

# Cultivation or Thank You Events

- Social Gatherings
  - After Masses
  - In a home
  - At the Rectory
- Dinners
  - Thank you
  - Cultivation and Presentation
- Receptions
  - Pastor
  - Bishop
- Special communication efforts with donors

# Solicitation efforts: Follow-up

- Second appeal letter sent from Bishop
- Second appeal letter sent from Pastors
- Second appeal letter sent from Agencies
- “Nudge” letter to no pay/slow pay donors
- LYBUNT Letter
- Email blasts
- Appeal letter sent from donor
- Appeal letter using gift equivalencies
- Special letter to never-givers or rare-givers

# Solicitation

Arlington

Dear Mr. and Mrs. XXXXXXXX,

Since my conversion to the Catholic faith in 2003, God has blessed me with many opportunities to serve our Church. At the Church of the Nativity in Burke, I help lead the RCIA program to form new disciples. I am a member of the Board of Directors of Catholic Charities of the Diocese of Arlington to assist those in need. I also serve on the Diocesan Review Board (established in 2002). This Review Board ensures that child protection policies are in place in our diocese, and makes recommendations to the Bishop regarding the credibility of evidence when clergy are accused of sexual abuse.

For nearly a year, news about clergy sexual abuse has prompted some to say, “don’t give bishops a dime.” Some think that gifts made to our Bishop’s Lenten Appeal (BLA) benefit the Bishop personally, and reducing or eliminating contributions will prompt the Bishop to enact new policies or make better decisions. The fact is, withholding funds won’t hurt the Bishop, but it will impact Church ministries and people who benefit from the BLA: the hungry, the homeless, women in crisis pregnancies, Catholic school and religious education students and seminarians studying for the priesthood.

Like many, I too was angered by misconduct of clergy and the failure of some bishops to deal properly with abuse issues. However, as the first enclosure with this letter indicates, the Diocese of Arlington and Bishop Burbidge have been at the forefront of efforts to ensure the safety of children, help victims heal and address each allegation of abuse responsibly. Our Catholic faith continues to flourish in our diocese. I recently witnessed 28 new disciples who were confirmed at our parish Easter Vigil Mass. I know firsthand the good work of Catholic Charities in such ministries as Christ House, which helps transform the lives of poor and homeless people. I give thanks to God for the 4 men who will be ordained priests in June and the 52 men who will be in the seminary next fall. Enclosed with this letter is information that highlights many other BLA funded ministries, including child protection and victim assistance programs.

When we support the ministries of the BLA, we help keep Christ’s Light shining brightly in the midst of darkness. As a fellow Catholic who shares your concerns and your hope in Jesus, I ask you to join me in supporting the Bishop’s Lenten Appeal this year to fulfill our baptismal call to help transform our world that so desperately needs it.

Sincerely in Christ,  
Ronald S. Riggins  
Parishioner, Church of the Nativity

# Pledge Card Insert: Archdiocese of Hartford

## 2016 ARCHBISHOP'S ANNUAL APPEAL... "God's Mercy at Work"



- Yes, Archbishop Blair,** I/we want to be part of "God's Mercy at Work" for the 2016 Archbishop's Annual Appeal. Please use my/our gift to advance the Good Works of the Church and the ministries of the Archdiocese.

**Equivalent of:**

- One Catholic School Tuition Scholarship
- One Month Supply of Diabetic Medication at Malta House of Care
- Meals for 126 Individuals at St. Vincent DePaul
- Lenten Sacrifice - \$2/Day

<u>Gift</u>	<u>5 Payments</u>
\$500.00	\$100.00
\$247.00	\$ 49.50
\$135.00	\$ 27.00
\$ 80.00	\$ 16.00

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, ST, Zip: \_\_\_\_\_

Email: \_\_\_\_\_

Parish: \_\_\_\_\_

Parish City: \_\_\_\_\_

Total \$ \_\_\_\_\_

Enclosed \$ \_\_\_\_\_

Balance \$ \_\_\_\_\_

**Make checks payable to:**  
 Archbishop's Annual Appeal, P.O. Box 28, Hartford, CT 06141-0028

**See Reverse for:**  
 Credit Card    Securities    Name, address, parish corrections

# Gift Equivalencies: Archdiocese of Hartford

Gift Range	Ask Levels	5 Payments	Equivalencies
<b>\$0-\$35</b>	\$247	49.40	• One Month Supply of Diabetic Medication at Malta House of Care
	\$190	38.00	• Provide Training and Support to One Youth Minister
	\$80	16.00	• Lenten Sacrifice - \$2/day
	\$55	11.00	• Provides 51 Soup Kitchen Meals
<b>\$36-\$73</b>	\$368	73.60	• Emergency Assistance Fund Grant
	\$247	49.40	• One Month Supply of Diabetic Medication at Malta House of Care
	\$135	27.00	• Meals for 126 Individuals at St. Vincent dePaul
	\$80	16.00	• Lenten Sacrifice - \$2/day
<b>\$74-\$115</b>	\$356	71.20	• Fourteen Week Supply of Diapers for a Newborn
	\$247	49.40	• One Month Supply of Diabetic Medication at Malta House of Care
	\$190	38.00	• Provide Training and Support to One Youth Minister
	\$135	27.00	• Meals for 126 Individuals at St. Vincent dePaul
<b>\$116-\$175</b>	\$412	82.40	• Non-Profit Provides 28 Families Basic Hygiene Products and Medications Weekly
	\$380	76.00	• Provide Training and Support to Two Youth Ministers
	\$247	49.40	• Provides Two Week's Worth of Non-Perishable Items at Local Food Pantry
	\$210	42.00	• One Week of Participation in Early Childhood Program
<b>\$176-\$225</b>	\$500	100.00	• One Catholic School Tuition Scholarship
	\$412	82.40	• Non-Profit Provides 28 Families Basic Hygiene Products and Medications Weekly
	\$300	60.00	• Wellness Blood Screening for a New Patient at Malta House of Care
	\$247	49.40	• Provides Two Week's Worth of Non-Perishable Items at Local Food Pantry
<b>\$226-\$275</b>	\$540	108.00	• Month of Family Counseling in Behavioral Health Program
	\$412	82.40	• Non-Profit Provides 28 Families Basic Hygiene Products and Medications Weekly
	\$380	76.00	• Provide Training and Support to Two Youth Ministers
	\$300	60.00	• Wellness Blood Screening for a New Patient at Malta House of Care
<b>\$276-\$350</b>	\$791	158.20	• Eight month supply of diapers for a newborn in need
	\$540	108.00	• Month of Family Counseling in Behavioral Health Program
	\$445	89.00	• One Month of Groceries for a Household in Need

## Seattle

### **SAMPLE OF SEGMENTS (5)**

#### **Last Years' Donors – 2 separate letters**

- \$365 and above (asked for 5% increase)
- Below \$365 (asked to consider \$365)

#### **Lapsed Donors (gave a gift sometime between 2008-2014 but not in 2015)**

- Asked to consider \$365

#### **Severely Lapsed Donors (last gift prior to 2007) and Severely Nevers (in database prior to 2007 with no gift history)**

- Trying to re-engage/engage
- No formal letter – redesigned brochure and pledge card with short message
- Amount choices \$50/100/200/Other

#### **Newly Registered and Newer Nevers**

- Asked to consider \$365



## **Seattle**

### **\$365 ASK**

If you gave last year, please consider increasing your gift by 5% this year. If you did not give last year, would you consider a gift of a dollar a day (\$365)?

*Gifts of any amount are welcome, and your gift will make a big impact on many lives in Western Washington!*

### **Started asking for the \$365 gift amount in 2007**

**The first year, we had 497 donors:     \$181,405**

**This past year, we had 3,684 donors: \$1,344,660**

# You can't say "thanks" too often or too much!

- Thank-you card from Bishop
- Thank you calls from Bishop/Diocesan staff
- Thank-you letter from Bishop
- Pastor's Thank-You
- Thanksgiving "Thank-You" letter with prayer intention card from Bishop
- Thanksgiving phone blast "Thank-You"

# Year-Round Education on Appeal/Diocese

- Diocesan Newspaper articles
- Parish bulletin thoughts
- Newsletters from diocesan agencies
- Pledge reminder impact messages

# Buckslip

**DIOCESAN**  
**SUPPORT**  
**APPEAL** 2019



## Your DSA Dollars at Work

Each April and May, thousands of girls and boys across the Diocese of Charlotte make their First Holy Communion. The Diocesan Support Appeal proudly provides assistance to all our parish Directors of Religious Educations through catechist formation and various resources.

May God continue to bless these children.

**Thank you for your support of the DSA!**

# Evaluating Your Appeal

- Self-assessment or use a Consultant
- Use New or Existing Advisory Committee
  - Involve Pastors, Laity and Staff on Committee
- The Process
  - Have Ideas on what you are trying to Change
  - Draft an Issue Paper of Known Concerns
  - Survey Committee for Other Issues
  - Discuss Issues and New Ideas or Methods

# Assessment Components:

- Evaluation may include:

**The Bishop's Role**

**Pastors' Role**

**Pastoral or Lay Leadership**

**Training of Leaders**

**Donor Understanding**

**Diocesan Staff**

**Solicitation Methods**

**Campaign Material**

**Donor Participation**

**Diocese's Image**

**Appeal Organization**

- Have honest reflection and discussion
- See outside opinions
- Review measurable outcomes (appeals analysis)
- Be willing and able to react to things you learn
- Expand your horizons!

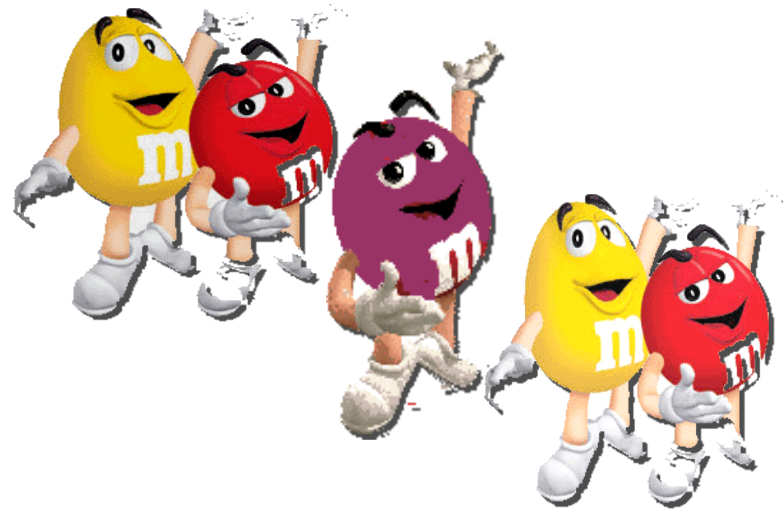
# 2018 DSA Appeals Analysis

Appeal	Total Gifts	% of Gifts	Donors	% of donors	Avg. Gift Amt per Donor
01 - First Ask	\$1,477,550	26%	4155	23%	\$356
02 - Pastor Support (Ask)	\$1,096,718	19%	3368	19%	\$326
03 - In Pew	\$1,496,564	26%	5420	31%	\$276
04 - Second Ask	\$315,558	5%	1117	6%	\$283
05 - Third Ask	\$108,6200	2%	445	3%	\$244
08 - Rollover Gifts	\$70,444	1%	278	2%	\$253
09 - Misc Gifts	\$302,379	5%	792	4%	\$336
10 - Online Gifts	\$832,191	14%	1768	10%	\$471

# Best Practices – Look beyond your own diocese

- Five **M**'s to building a network of resources:

- 1) **M**aterials
- 2) **M**eetings
- 3) **M**ixing
- 4) **M**odels
- 5) **eM**ails





# Communicating Results

- Diocesan Newspaper
- Final results sent to parishes
- Website story on results
- Diocesan Annual Financial Report
- Share previous year results at new year kick-off events

## **Small Office**

- Director
- Administrative Assistant
- Support staff (seasonal)

## **Medium/Large office**

- Director of Office
- Annual Appeal Director
- Leadership / Special Gifts Director
- Administrative Assistant
- Database Manager
- Database Manager – could be done by the finance office
- Planned Giving Director

# Role of Diocesan Staff


- Provide proactive leadership for Appeal
- Coordinate Diocesan training sessions
- Coordinate and disseminate information
  - Clergy
  - Laity
  - Parish Staff
- Offer encouragement and appreciation to parish leaders
- Weekly communication with parishes
  - Fax
  - E-mail
  - Phone

# Role of Diocesan Staff (cont'd)

- Develop a year long appeal calendar
- Identify struggling parishes and work closely with them on individual basis
- Oversee accurate record keeping
- Interact with accounting office

# Role of Diocesan Staff (cont'd)

- Communicate acknowledgements
  - Written
  - Telephone
- Respond to prayer intentions
- Establish a speakers bureau
- Develop all marketing materials
  - Video, Posters, Brochures, letters



# In Closing

- Each Diocese is Different
  - Must evaluate materials presented
  - What is appropriate for your diocese?
  
- Running An Annual Appeal...
  - Prior to, during, or after a capital campaign
  
- Questions



# Contact Us

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