

Parish Capital Campaign Basics And Sample Campaign Materials

For additional assistance, please contact

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Steps for Conducting a Parish Capital Campaign

STEP 1: Assessment

- A. Convene the Campaign Committee to assess fund raising status and involve them in the planning process.
- B. Reaffirm internal agreement on needs, plans and priorities, Recruit volunteers and/or additional Campaign Committee members as necessary.
- C. Develop case statement for support and timetable.
- D. Analyze prospect base. Analyze offertory giving records and list families by giving level. Consider ways you might enlarge your constituent base.
- E. Continue regular fund raising activity.

Step 2: Pre-campaign Activity & Major Gifts Phase

- A. Determine campaign goal and overall campaign direction and strategy.
- B. Develop gift range chart.
- C. Develop written plan with specific tasks, person responsible, and time deadline for completion.
- D. Conduct Major Gift Phase – solicit and secure gifts commitments from major donors.
- E. Conduct in-house phase – the pastor, parish staff, and Campaign Committee members should be asked to make a gift commitment.

Step 3: Parish Phase

- A. Make public announcement when 40%-50% of goal is pledged.
- B. Follow established plan.
- C. Strategies may include personalized mailings, tables after Mass, in-pew solicitation, and pulpit talks.
- D. Continue personal solicitation.
- E. Continue all regular fund raising, communications and PR activities.

Step 4: Wrap Up

- A. Conduct telephone follow-up for solicitation of smaller gifts.
- B. Conclude personal solicitation.
- C. Manage pledge payment follow-up.
- D. Evaluate campaign results.
- E. Provide appropriate recognition for staff, donors, volunteers, and others who were involved in the campaign.
- F. Continue all regular fund raising, communications, and PR.

Parish Capital Campaign Tips for Success

1. **Obtain Diocesan Approval.** All parish capital campaigns must be approved by the Bishop. Income from approved campaigns is excluded from assessable receipts of the parish.
2. **Develop and Communicate a Compelling Case.** Identify a genuine need, and help people become personally committed (mind and heart) to making a difference in the parish (and the world) by helping to meet that need through the capital campaign. A parish capital campaign should be *custom tailored to fit the unique needs of the parish community and unique objectives of the capital project*. Each sample brochure and letter provided in this handout will need to be customized for your parish and campaign. They are meant to be examples only. Reasons for the appeal (the case statement) need to be *clearly* communicated. Printed materials should describe all financial objectives and have a *professional appearance*. The care, quality, and enthusiasm with which the campaign is presented to the parish is an indicator of the care, quality and enthusiasm with which people will expect their gifts to be administered.
3. **Motivate and Involve Volunteers.** Motivate and involve a large number of volunteers to conduct your parish capital campaign. You can't conduct an extraordinary fund raising program by direct mail or by taking up a second collection. Successful capital campaigns are the result of strong, committed leadership. Leadership from the pastor is not enough. Successful campaigns also require the active, grass-roots involvement of women and men in many different facets of the parish – each performing important but manageable tasks within the overall campaign structure. Finding new ways to personally involve large numbers of people in the campaign can be one of the most challenging tasks, but is essential to success.
4. **Ask.** Someone has to ask for the gift. Parishioners should be asked to make substantial financial commitments at levels of giving that stretch their ability to give. The ask can be buried in a letter or done in a generalized way from the pulpit or at a large gathering of people, but in the end, the only really effective way to solicit substantial gifts (of any size) is by means of a personal invitation. When presented with a compelling case, strong leadership and active volunteers, and the right kind of personal invitation, it is difficult to respond “no.” Every day, the average individual is presented with multiple opportunities to respond to extraordinary needs presented to them in capital campaigns. Your parish capital campaign is at least as important as the other charitable causes.
5. **A Stewardship-Based Campaign.** A capital campaign can be an excellent opportunity to teach principles of Christian stewardship and to challenge people of faith to make substantial commitments of time, talent and treasure based on prayerful discernment of God's will. A stewardship-based campaign begins, or reinforces, a process of stewardship education and formation that should continue long after the capital campaign is over, and it invites people to discern God's will in their lives. A capital campaign can be an occasion for spiritual growth if it remembers to place first things first. The campaign is never an end in itself. It is always a means to an end. The end does not have to be purely financial – it can be a pastoral or

spiritual end. Discerning God's will is always a much more challenging personal invitation than simply asking for a one-time financial commitment!

6. **Pledges.** Encourage pledges over a 3 year period. People will give more when they can spread payments over an extended period of time. All pledges should be gently solicited. No one is asked to give more than they can afford. Gifts of all sizes are gratefully received. All parishioners are included in the appeal, and every member of the parish is treated in the same manner.
7. **Continue Normal Fund Raising.** The appeal should be non-disruptive to normal parish activities. Regular fund raising activities should continue throughout the campaign, although care should be taken to plan fundraising activities cooperatively and clearly communicate reasons for the appeals. Help parishioners to understand that capital campaign pledges should be "above and beyond" their regular giving to the parish. Remind them that their regular gifts (parish offertory, annual U.P. Catholic Services Appeal gifts, and other parish financial support) are still needed.
8. **Gift Discernment.** Guidelines to Giving help people to discern what gift amount they can give. The guidelines should be tailored to the giving potential of the parishioners together with the amount to be raised. Include examples of total gift amounts broken down into manageable payment schedules (i.e. a \$1,000 pledge, paid monthly for three years, is approximately \$28/month, less than \$1/day).
9. **Attitude.** A parish capital campaign can and should be an exciting time in the life of a parish family – not a dreaded, fund raising experience. As parish leaders, one of our greatest strengths is an attitude of opportunity, not obligation. A parish capital campaign is an opportunity to give back to God in thanksgiving a portion of the blessing He has freely given to us. It is an opportunity for all parishioners to give extensively of their time, talent, and treasure for the betterment of their parish community. If we, in our capacity as leaders, focus on the obligation rather than the *opportunity* to give, we do not allow our people to experience the great joy of giving, especially the joy of giving back to their God. Our attitude and enthusiasm must immediately convey that this parish project is really an opportunity, not simply another obligation to add to the list.
10. **Thank Everyone.** Last, but certainly not least, take the time to properly thank everyone. People give to a cause because they have a need to help. They want to feel that they have indeed helped, and the only way this will happen is if you tell them. Consider carefully how and when you will thank those who give. The minimum every donor should get is a letter or card personally signed by the pastor. Many capital campaigns offer special recognition to donors who give at or above a predetermined gift level (a memorial coffee mug, a dedication book or inexpensive memento, or a plaque with engraved nameplates that is displayed in a prominent location.) What ever method you choose, make sure you thank every donor in some way.

Sample Time Line For a 7-Week In-Pew Capital Campaign

- Weeks 1-4 Advance Gift Phase
- Identify potential donors (at least 10-15% of the parish)
 - Contact potential advance donors through personal visits, receptions, letters, and phone calls
 - Obtain leadership pledges
 - The campaign is “kicked off” with some pledges already in
- Weekend #5 In-Pew Weekend #1
- Announce campaign to the entire parish from the pulpit
 - Discuss goals, reasons and importance of the campaign
 - Announce pledge total received to date (from the advance gift phase)
 - Discuss the events of the upcoming weeks
 - Recite the campaign prayer
 - If a plaque or other donor recognition piece is used, it should be erected so parishioners are able to view it for the first time. Engraved nameplates may already be on the plaque.
- Weekend #6 In-Pew Weekend #2
- Announce campaign goals, objectives & current pledge total once again
 - Ushers distribute information (Q&A sheet, Guidelines to Giving)
 - Discuss suggested giving levels, address key concerns and questions
 - Remind the parish that next weekend is the weekend everyone will be asked to make their pledges
- Week #6 Direct Mail to all Households
- Between in-pew weekends #2 and #3, a campaign brochure, question & answer sheet and cover letter from the pastor is mailed to every home. If a donor recognition piece is used, include a flyer describing it and the gift levels required. This will set the stage for Commitment Weekend.
- Weekend #7 In-Pew Weekend #3 (Commitment Weekend)
- Announce campaign goals, objectives & current pledge total once again
 - Ushers distribute Commitment envelopes with contain two pledge cards (one to turn in and one to keep), a pencil and a Guideline to Giving.
 - The suggested giving levels are discussed again
 - At this time people are asked to make their pledges and given a few minutes to fill out their cards,
 - Ushers pick up the envelopes with the completed pledge cards in them
- Week #7 Wrap Up
- A personalized thank you letter is sent to all who responded
 - A follow-up letter is sent to all who have NOT responded
 - A second follow-up (letter or phone call) is sometimes sent to all who still have NOT responded
 - Report back to the parish community on campaign progress

ST. OUR PARISH
100 Main Street
Anytown, USA 00001

*Sample Reception
Invitation Letter*

Mr. and Mrs. Joe Parishioner
111 Main Street
Anytown, USA 00001

Dear Joe and Mary,

As concerned and involved parishioners, you know we have much to be grateful for here at St. Our Parish. You and your family have celebrated many rights of passage by the sacraments in our worship space. Some have shared in the educational experience of St. Our Parish's School. Some have intensely met the presence of God at the altar or confessional. Some have professed their love in lifetime commitment or buried a loved one. St. Our Parish has been a gathering place of prayer for thirty-five years and we celebrate that heritage.

As your pastor and with the enthusiastic approval of the Pastoral Council, I would welcome the opportunity to discuss with you a capital campaign to ensure the ongoing maintenance of our parish worship space.

Ongoing maintenance for anyone who owns property is a way of life. Our buildings are thirty-five years old. Both the Church and the convent require new roofs. The carpet in the Church is showing the wear of twenty-five years. The front steps and front doors need replacement. The original gym lighting, heating and cooling systems need review. I need your help to enact these needed procedures.

You are cordially invited to a reception on Saturday, November 15 at 7:00 p.m. at the Parish Rectory, 101 Main Street. Refreshments will be served. Please R.S.V.P. by using the enclosed card and self-addressed stamped envelope. At this reception, I will share with you my hopes for St. Our Parish as we journey to the next millennium.

Your acceptance of this invitation will be greatly appreciated and will be a sign of your commitment to "Preparing St. Our Parish for the next Millennium."

Sincerely yours in Christ,

Pastor

ST. OUR PARISH
100 Main Street
Anytown, USA 00001

*Sample Pastor's Advance Gift
Solicitation Letter*

Mr. and Mrs. Joe Parishioner
111 Main Street
Anytown, USA 00001

Dear Joe and Mary,

I deeply appreciate the tremendous support you have given to St. Our Parish. I am sending this information to you with the hope that you will be able to join with me and fellow parishioners in helping St. Our Parish address some pressing needs within the parish.

In the coming months, our Church will be undertaking major renovations including: moving the Tabernacle to a more prominent area of worship, raising the altar and moving it forward, modifying the front wall and bringing the Baptismal font to the Sanctuary area; also, we will restore and rearrange the pews, install new flooring, replacing the oil burner, add a handicap accessible lavatory, paint the walls and ceilings, and repave the parking lot. It is now time for us to move forward as a parish community and meet these needs.

For this reason, with the approval of our Bishop and our Parish Pastoral Council, we will conduct a special capital fund drive to raise a minimum of \$350,000 in pledges, payable over three years. If we can raise at least \$350,000 in pledges through our "Honor Our Past – Invest In Our Future" campaign, we will be able to meet many of the needs I have listed above.

I will be asking ALL parishioners to join with me in making a three year pledge for this important project. Due to your generous financial support to St. Our Parish, I am asking you to make a Pacesetter Gift of at least \$3,000 or more if you can manage it, payable over a three year pledge period. The enclosed brochure will give you additional information about your pledge for our campaign. All gifts over \$1,080 will be recognized on our new St. Our Parish Family Plaque. Please study the enclosed flyer describing our new Family Plaque.

Your unselfish pledge will help ensure the success of our campaign because it will serve as a positive example for the rest of our parishioners who will be asked to make their three year pledges on Commitment Weekend, November 22 and 23.

Please fill out the enclosed pledge card and return it to the parish office by November 5. I have enclosed a self-addressed stamped envelope for your convenience.

Thank you for your past and present support of St. Our Parish. Please join with me and pray for the success of our campaign.

Sincerely in Christ,

Pastor

ST. OUR PARISH
100 Main Street
Anytown, USA 00001

***Sample Letter #1 to accompany
the brochure sent just prior to
Commitment Weekend***

Mr. and Mrs. Joe Parishioner
111 Main Street
Anytown, USA 00001

Dear Joe and Mary,

I am pleased to be able to report that our “Preparing St. Our Parish for the Next Millennium” capital program is advancing right on schedule. Thus far, we have received \$124,840 against our \$350,000 minimum goal. Our average pledge at this time is \$1,980.

I am enclosing our campaign brochure for your review. Please read it carefully. The brochure will provide you with all the details of our project, present our “Guideline to Giving” and answer most, if not all, of the questions you may have about this important undertaking for St. Our Parish. It is important that you have the opportunity to review our campaign brochure now and discuss your intentions with other family members.

Our Parish Family Plaque, now a permanent part of St. Our Parish, already has several engraved nameplates. Please study the enclosed St. Our Parish Family Plaque flyer and join with me in placing your nameplate on our plaque.

Please pray for the success of this campaign. Commitment Weekend is Saturday and Sunday, May 30 and 31. God bless you.

Sincerely in Christ,

Pastor

ST. OUR PARISH
100 Main Street
Anytown, USA 00001

***Sample Letter #2 to accompany
the brochure sent just prior to
Commitment Weekend***

Mr. and Mrs. Joe Parishioner
111 Main Street
Anytown, USA 00001

Dear Joe and Mary,

Construction is underway at St. Our Parish! The much needed building improvements will make our church more beautiful and hospitable. They will help us to more fully experience the renewed liturgy that has come to us from the second Vatican Council. The Council urges us to take into account the fact that people who attend the liturgy, and those who are a part of the assembly, are very important to God and to each other. This includes the beauty inside of our building; enough light to see each other, the presider and the printed page; and arrangement of pews that creates a strong feeling of community; the rescue of important reminders and artifacts of the past; and an environment that emphasizes what is truly important in the lives of the people who are present.

I am grateful to the team of St. Our Parish parishioners who have helped to plan the project and the fund raising that is necessary to finance it. Our fund raising goal is \$350,000. A few parishioners have generously taken the lead and spurred us to action by already contributing \$124,840 toward the project. We have presented improvement plans and the critical necessity of financial support over the past few weeks. Now it is time to secure your personal pledge of support.

It is our request that every St. Our Parish family make a financial commitment, payable over three years, to support this important project. I hope that you will prayerfully consider this opportunity, reflect on God's blessings, and commit with vigor to this essential parish project. Please use the enclosed pledge form to indicate your response, and return it to the parish within the next two weeks.

Giving is a spiritual adventure. It is an act performed for God and with God. As we put this into perspective, we will know the joy that comes from making the decision to give. The building improvements that we are making to our church honor those who went before us and represent a special gift to ourselves and to future generations of St. Our Parish families. I ask that you take up the challenge of deepening your own experience of faith and further the mission of Christ carried out here at St. Our Parish.

Sincerely yours in Christ,

Pastor

St. Our Parish
Anytown, USA

Capital Campaign Pledge Form

Name _____
Address _____ City/State/Zip _____
Phone (Home) _____ (Work) _____ (E-Mail) _____

Have you remembered your parish or Diocese in your Will?

- Please send me more information
- I have included St. Our Parish in my will
- I have included the Diocese in my will

In appreciation of God's gifts, I/we pledge the following:

- | | | |
|---|--|---|
| <input type="checkbox"/> \$10,000 (\$3,333/year/3years) | <input type="checkbox"/> \$750 (\$250/year/3years) | <input type="checkbox"/> \$150 (\$50/year/3years) |
| <input type="checkbox"/> \$ 5,000 (\$1,667/year/3years) | <input type="checkbox"/> \$500 (\$166/year/3years) | <input type="checkbox"/> \$100 (\$33/year/3years) |
| <input type="checkbox"/> \$ 2,500 (\$833/year/3years) | <input type="checkbox"/> \$300 (\$100/year/3years) | <input type="checkbox"/> \$ 75 (\$25/year/3years) |
| <input type="checkbox"/> \$ 1,000 (\$333/year/3years) | <input type="checkbox"/> \$225 (\$75/year/3years) | <input type="checkbox"/> Other \$ _____ |

Payable: Monthly Quarterly Semi-Annually Annually
For: 1 year 2 years 3 years Other _____

Memorial/Honorary Gift: I would like my gift to be in memory/honor of: _____
(please print name)

Amount Enclosed: \$ _____ Signature: _____
Balance Due: \$ _____ Date: _____

Thank you! For your convenience, the Diocese of Marquette can assist with making your gift to St. Our Parish in the form of securities, life insurance, charitable gift annuity, or other planned gift. For assistance call 906/227-9138.

- Always include a self-addressed, stamped return envelope with the pledge card.
- Pledge card could alternatively be printed on the flap of a remittance envelope, so the parishioner fills in the information, encloses their check, folds and seals the envelope.
- As pledges are redeemed, this is an opportunity to verify information and update parish records accordingly. It is also an opportunity to ask for and record new information, such as e-mail address, and whether or not the parishioner has included the parish in their will. If the parishioner indicates that they have included the parish in their will, a thank you is in order. If they indicate that the diocese is in their will, please notify the diocesan Development Office so that a thank you can be sent on behalf of the diocese.
- When additional information is sought, provide it immediately. If the donor wants more information about including the parish in their will or about making a planned gift, the sooner you respond the better. Your diocesan Development Office can provide sample will language, Will Planning Guides, and assistance with planned giving.

ST. OUR PARISH
100 Main Street
Anytown, USA 00001

*Letter sent after
Commitment Weekend
to those who have NOT responded*

Mr. and Mrs. Joe Parishioner
111 Main Street
Anytown, USA 00001

Dear Joe and Mary,

I am sure you will be pleased to learn that our parish-wide campaign is being very well received and is nearing its close. Our overall objective is \$350,000, and we now have \$300,000 in pledges and gifts. My prayerful hope is that every family in St. Our Parish will take part in this program of prayer and sacrifice for the New Millennium.

In order to meet our objective, we need each family to prayerfully consider a substantial gift to God in the true spirit of love. Often this is not a great burden if you will consider a pledge payable over 36 months. Several gift plans are shown in the enclosed brochure. Please study carefully the information describing Our Parish Family Plaque.

I realize that not every family is able to choose the same gift plan, but every family can be counted among our parish benefactors. What our Lord asks is not equal pledges but equal sacrifice. Please think about what you can manage without undue burden. Even if you cannot make a pledge, please write me a little note on the back of the card and return it to me. You have my total assurance that your communication will be confidential. There may even be something I can do to assist you.

The campaign will soon be over. In order to complete our campaign, we wish to have a response or pledge card from every parishioner. Please return your card to me in the enclosed envelope this week or drop it in the collection basket this weekend. If you have returned your pledge card before receipt of this letter, please accept my most sincere gratitude for your participation.

In the meantime, be assured that I pray at Mass everyday for you and for all the families of St. Our Parish. Please join with me and pray for the success of our program of spiritual renewal.

Sincerely yours in Christ,

Pastor

ST. OUR PARISH
100 Main Street
Anytown, USA 00001

Sample Thank You Letter #1

Mr. and Mrs. Joe Parishioner
111 Main Street
Anytown, USA 00001

Dear Joe and Mary,

On behalf of St. Our Parish, I want to thank you for your pledge to support the Capital Campaign. Your generous support helps to ensure the success of our parish improvement project, and is a reflection of your deep commitment to our faith community here at St. Our Parish.

I am both gratified and inspired by the personal investment that so many of our parishioners have made already to our Capital Campaign. The confidence that is being expressed in our parish's ability to come together and achieve our vision for a beautiful and hospitable church is overwhelming.

May the blessing of God's Spirit continue to nourish you in the days to come.

Gratefully in Christ,

Pastor

ST. OUR PARISH
100 Main Street
Anytown, USA 00001

Sample Thank You Letter #2

Mr. and Mrs. Joe Parishioner
111 Main Street
Anytown, USA 00001

Dear Joe and Mary,

I have received your commitment of \$ _____ to the St. Our Parish Capital Campaign. As your pastor, and on behalf of our entire parish family here at St. Our Parish, I want to thank you for your gift.

I know you agree that the projects we are undertaking are much needed and worthwhile. Your understanding and generosity, together with others, will help to provide a secure future for our parish.

As we continue to move forward, I will keep you informed. In the meantime, please join me in praying for the success of our campaign. May God bless you and those you hold dear.

Sincerely in Christ,

Pastor

P.S. Your generous commitment entitles you and your family to special donor recognition on St. Our Parish Family Plaque. I am enclosing a self-addressed envelope and an inscription card for you to complete and return as soon as possible. It is not necessary for your pledge to be paid in full. We will order your engraving now.

ST. OUR PARISH
100 Main Street
Anytown, USA 00001

***This letter is sent to those
who write or call to say they
are unable to make a pledge.***

Mr. and Mrs. Joe Parishioner
111 Main Street
Anytown, USA 00001

Dear Joe and Mary,

Thank you so very much for your thoughtful response to my request for a pledge to our parish capital campaign. I am grateful to you for what I know is a meaningful and genuine concern for St. Our Parish.

As your pastor, it is tremendously moving to me to hear from so many of our parish family. Together, great things can be accomplished. Thank you for answering my letter; please continue to pray for the success of our effort. For my part, I assure you that I will always strive to exercise prudence in the financial affairs of our parish.

Each week as I offer Mass for you, I do so with a heart full of gladness and thanksgiving. May God grant you every blessing and again, I offer my very warm thanks.

Sincerely in Christ,

Pastor