Faithful To God

Loving To Our Neighbor

Bishop’s Annual Appeal ☩ 2013

Telephone Follow-up Manual

Bishop’s Annual Appeal Follow-up Process
INTRODUCTION

On behalf of Bishop Frederick Campbell and the Office of Development and Planning, we thank you for volunteering to assist with the follow-up efforts of the Bishop’s Annual Appeal. Your gift of time and talent will impact the overall efforts at your parish and benefit so many diocesan ministries, programs, services and agencies.

The Telephone Follow-up is the final step in the Appeal solicitation process. Follow-up efforts are conducted to encourage and increase parishioner participation. There are two methods of follow-up solicitation available for the parish to use:

- Pastor’s Follow-up letter (see page 16 of the Instruction and Reporting Procedures Manual)
- Telephone Follow-up Phone Calls

This manual specifically explains the Telephone Follow-up solicitation method.

TELEPHONE FOLLOW-UP

Making phone calls can be very beneficial to the parish’s overall participation. Speaking directly to parishioners establishes lines of communication and offers an opportunity to explain the benefits of the Bishop’s Annual Appeal. This also allows parishioners to make a well informed decision, encourage their participation and can result in an immediate gift.

Phone calls are made only to households within the parish that have not responded to the Appeal. The list of parishioners to call is determined by the remaining Pink ID Labels or contact the Office of Development and Planning for a list. Once the parish has determined who needs to be contacted, the Parish Staff or Bishop’s Annual Appeal Leadership should prepare the Telephone Follow-up Cards and a group of volunteers should be assembled to assist with the calls. A date, time and place should also be coordinated.

Phone calls can be made two or three weeks after the Bishop’s Annual Appeal Weekend. The length of time a parish spends making phone calls depends on the number of calls that need to be made and the number of volunteers available to make the calls. It is best to divide up the calls among the volunteers and allow them two weeks to complete a group of calls. We recommend a total of 15 to 25 calls per volunteer. As a suggestion, if the volunteer completes their phone calls early they may want to make additional calls. All phone calls should be completed by the last week of reporting. Please refer to the 2013 BAA Calendar on pages 2 and 3 of the Instruction and Reporting Procedures Manual for a suggested timeline.

Volunteers can gather in one central location to make phone calls, or volunteers can make the calls individually from their home.

Please read through the Telephone Follow-up Manual before making any phone calls, paying close attention to the Helpful Hints and Facts and Figures pages. This information will help each volunteer to prepare when making calls.
MATERIALS NEEDED

- **Telephone Follow-up Manual** —provides information and tools to facilitate the follow-up phone call process. Each volunteer should receive one manual. **Please read through the manual before making any phone calls.**

- **Pre-labeled Telephone Follow-up Cards** — The Parish Staff or Bishop’s Annual Appeal Leadership will provide Telephone Follow-up Cards with Pink ID Labels affixed. The Pink ID Labels contain the contact information of the parishioners, including the phone number.

INSTRUCTIONS

1. Determine how many calls need to be made. This can be identified after all pledge/gift envelopes have been received and processed from Bishop’s Annual Appeal Weekend or “Sign-up During Mass” and Worker Stations. The remaining Pink ID Labels should provide the necessary call list or you can contact the Office of Development and Planning to obtain a listing. The Parish Staff or Appeal Leadership should attach all remaining Pink ID Labels directly to the Telephone Follow-up Cards and then provide them to the volunteers.

2. Assemble a group of volunteers to assist with the calls. The number of volunteers is based on the number of calls to be made. Each volunteer should be assigned 15 to 25 phone calls and try to complete the calls within a two-week period. As a suggestion, if volunteers complete their phone calls early they are welcome to make additional calls. The work will seem easy when many are involved.

3. Establish a schedule of dates, times and location for the volunteers to make calls. The time of the phone calls should be made during the week in the evenings from 7:00 p.m. to 8:30 p.m. or on weekends, starting May 25 through June 23. The location could be at the parish facility or each volunteer can make the calls from their home.

4. Conduct a training session with the volunteers before making the calls. Provide each volunteer with a copy of this Telephone Follow-up Manual. Review the Helpful Hints and Facts and Figures on pages 3 and 4 of this manual. Be sure to address any questions the volunteers have prior to making calls. Conduct a brief “run-through” of the suggested script on page 6 of this manual.

5. Provide the pre-labeled Telephone Follow-up Cards to the volunteers, allowing them to choose whom they will call. Once volunteers have selected their group of names, it is very important that each volunteer fill out the Volunteer Contact Form found in the back of the manual. Volunteers should list all the names of the families they will be calling. This Volunteer Contact Form should be returned to the Parish Staff or Appeal Leadership before calls are made.

6. Ask volunteers to rubber band their completed Telephone Follow-up Cards together and return them to the Parish Staff or Appeal Leadership. When reporting the telephone follow-up results to the diocese, send the Telephone Follow-up Cards with your weekly Parish Report (Form 10). **See additional instructions on page 17-18 of the Instruction and Reporting Procedures Manual.**
HELPFUL HINTS

Be informed:
Information about the Bishop’s Annual Appeal is provided on pages 4 and 5 of this manual. Please read through the information and share it during your phone conversation. It is helpful to share how the funds will be used to support our diocese and parish families.

Be personal:
Keep in mind phone calls are being made to fellow parishioners. It is more personal when their name is used. He or she will listen more attentively to what you have to say if you are courteous. Thank the parishioner for their time or consideration whether or not a gift is made.

Participation:
The goal of the phone call is to inform and share details about the Bishop’s Annual Appeal and to encourage everyone to participate at any level. No gift is too small. Remind them that the Diocese truly needs the support of all our members in order to continue its outreach of charity, education, and other religious services. Ask them to pray for the success of the Bishop’s Annual Appeal. Refer to pages 4 and 5 of this manual for additional Facts and Figures.

Etiquette:
The best time to call is during the week in the evenings from 7:00 p.m. to 8:30 p.m. or on weekends. Let the phone ring at least five times before hanging up. Offer to call back if the parishioner is busy. Avoid calling at mealtime or late hours.

Answering Machines or Voice Mail:
It is suggested that you speak directly to a person and avoid leaving messages. If the parishioner is not answering, try again later.

Handling objections:
Above all, do not fear objections because this will tell you just how well informed each parishioner is about the parish and the Bishop’s Annual Appeal. Listen to their concerns and see if you are able to ease their objection.

If they are upset with the parish, Diocese or refuse to give:
Allow the parishioner to share his or her feelings. Once they have shared their feelings, they may be more receptive to what you have to say. Above all, do not argue. We want to encourage participation, not discourage it. Please record the response of the person you are speaking to on the Telephone Follow-up Card. Use either the boxes provided or the “Other” area.

Make Notes on Telephone Follow-up Card:
The cards are designed specifically for the Telephone Follow-up process and provide extra space for notes or additional information.

No contacts:
If after several attempts you are unable to contact a parishioner, please check the appropriate box on the card, “Unable to contact.” In July, the Office of Development and Planning will send a final follow-up mailing to all those who were not contacted.
FACTS and FIGURES

2013 Diocesan Information

- The diocesan goal for 2013 is $6 million.
- The Bishop’s Annual Appeal is the major fundraising effort conducted annually throughout our 23-county diocese with all parishes participating.
- The Bishop’s Annual Appeal provides funds for ministries, programs and services in education, charity, spiritual formation, pastoral ministry, parish assistance, and much more. See page 5 for additional information.
- Every parish meeting their parish goal has the opportunity to receive 100% of payments received above and beyond their parish goal and free from the diocesan assessment.
- Pledges may be paid over 10 months from June through the following March.
- Every gift is tax-deductible.
- We ask that each and every family of our diocese pray for the success of the Appeal and consider a gift to the Appeal. **No gift is too small.**

2012 Bishop’s Annual Appeal Facts and Figures

- The 2012 Appeal realized more than $6.7 million in pledges — 114.7 percent of goal, with more than $6.2 million paid, as of February, 2013.
- The average pledge in 2012 was $277.82.
- A total of 24,373 households contributed to the 2012 Appeal.
- Seventy-six (76) parishes exceeded their goals, providing more than $1.2 million for the needs of the individual parishes.
- The 2012 Miter Society grew to 1,928 members, welcoming more than 317 new members.
- The 2012 Miter Society pledged more than $2.94 million towards the $5.9 million goal.
- The 2012 Miter Society average gift was $1,526.43.

Parish Information

Please contact your pastor or parish administrator for the information below:

Our 2013 Parish Goal is: $______________________________

Amount Pledged Last Year: $____________________________

Number of Donors Last Year: __________________________
FACTS and FIGURES

The money raised through the Bishop’s Annual Appeal helps to financially assist the following ministries, programs and offices. Please visit www.coldsdioc.org for more information.

OFFICE OF Vocations
- Education and formation of seminarians pursuing a vocation to the priesthood.
- Funds events and programs such as the Andrew Dinners, Marian Dinners, and Learn to Discern.

OFFICE OF THE DIACONATE
- Offers comprehensive formation, continuing education, workshops, and retreats for all Deacons and Diaconate candidates.

OFFICE OF DIVINE WORSHIP
- Assists the office in supporting the Bishop in his role as chief liturgist for our diocese.
- Funds help to support the spiritual and pastoral programs such as RCIA, celebration of Confirmation and celebration of Episcopal Liturgies for parishes and groups.

OFFICE OF CATHOLIC SCHOOLS
- Provides tuition assistance to families in need.
- Offers grants to secondary schools for capital needs.
- Financial support for faculty and staff development, and curriculum enhancement.

RELIGIOUS EDUCATION AND CATECHESIS OFFICE
- Supports all Parish School of Religion teachers and parish catechists in forming the foundations of faith for young minds.

MARRIAGE AND FAMILY LIFE OFFICE
- Provides marriage preparation for couples and life enrichment programs to families.
- Funds ministries, programs and workshops on parenting and natural family planning.

OFFICE FOR SOCIAL CONCERNS
- Funds the overall goals and mission of the office to build social order through systemic change.
- Serves as local liaison for national programs; Catholic Relief Services & Campaign for Human Development.

BLACK CATHOLIC MINISTRIES
- Supports the mission of Black Catholic Ministries to promote education, spiritual growth and evangelization within the African American community.

CATHOLIC LATINO MINISTRY OFFICE
- Funds the services, ministry programs, and conferences that focus on the Latino community.

DIOCESAN COUNCIL OF CATHOLIC WOMEN
- Help to support, empower and educate all Catholic Women in spirituality, leadership and service.

JOINT ORGANIZATION FOR INNER-CITY NEEDS
- Supports the mission of J.O.I.N. to reach out to those who are in need.

OFFICE OF YOUTH AND YOUNG ADULT MINISTRY
- Provides funding for ministries and programs for youth and young adults at parishes, Catholic schools and college campuses within our diocese.

INSTITUTIONAL ASSISTANCE
- Provides programs for elderly, crisis intervention, and spiritual care of the hospitalized and the infirm.

ASSISTANCE TO PARISHES
- Offers an opportunity for parishes to receive funding to be used for the needs of the parish.

RETREAT CENTERS
- Provides ongoing support for the operation and staffing of retreat facilities.
TELEPHONE FOLLOW-UP GUIDELINES

Making the Call:

After you have reviewed the information in this manual and selected those parishioners whom you will be contacting, your phone calling can begin. Remember that most parishioners are aware of the Bishop's Annual Appeal from the brochure they received in the mail in late April. Appeal posters, parish bulletins, and pulpit talks have been shared with the community as well.

Try to inform your fellow parishioners of the importance of their participation, and the benefit to the parish. Let them know that they can participate by making a gift or pledge in a manner that suits their personal financial situation. Remember, every gift is important.

Suggested Telephone Script:

“Hello ___ (Parishioner’s Name)____, my name is ___ (Your Name)____. I’m calling from ___ (Parish Name)___ on behalf of ___ (Pastor’s Name)____ and Bishop Campbell. I serve on the parish committee for the Bishop’s Annual Appeal and we are making phone calls to discuss the importance of the Appeal and ask for your participation.”

“As a parish, it is important to encourage every family to participate by making a gift or pledge to the Appeal. Your gift or pledge directly impacts the number of ministries, services and programs throughout our diocese. In addition, your participation also helps our parish. The goal for our parish this year is $________, and once we have achieved this goal, the funds we raise above this amount will be returned to our parish to be used for [insert the use of 2013 funds returned to the parish].”

“Our diocese touches the lives of those within the 23 counties and 109 parishes. As you can tell the need is great knowing the number of people residing in these areas. Thousands of individuals are served daily by this outreach. Understand your gift will make a vital impact on these lives and continue to support our Catholic faith. We are asking for your participation. No matter the amount, your gift is important and I know ___ (Pastor’s Name)____ and Bishop Campbell will greatly appreciate your generosity.

Would you be able to help support our faith community by making a gift or pledge?”

If the parishioner responds “yes” — “That’s great. Thank you for your generosity. You can make a gift or pledge right over the phone today. Are you able to make a pledge and pay it in the next 10 months or would you prefer to make your gift in a different manner?”
If the parishioner makes a pledge — “Again, your pledge can be paid in 10 monthly payments, if you wish. It can be arranged for you to receive monthly reminder statements sent directly to you in the mail.”

**Verify the contact information on the Pink ID Label and correct anything incorrect. Accurately record the pledge information on the Telephone Follow-up Card and clarify the gift or pledge payment schedule with the parishioner.**

“On behalf of _____ (Pastor’s Name) _____ and Bishop Campbell we thank you very much for your support!”

If the parishioner responds “no” — “Thank you for your time. Perhaps you will consider giving to the Bishop’s Annual Appeal in the future. Please pray for the success of our efforts and have a nice evening.”

If the parishioner has already given, is no longer a member of the parish, or if you are unable to contact the parishioner please check the appropriate box on the Telephone Follow-up Card.

** Make sure to record all responses on the Telephone Follow-up Card.**
VOLUNTEER CONTACT FORM

Please fill out and return this form to your Bishop’s Annual Appeal Leader before making phone calls.

Volunteer’s Name: ____________________________________________________

Email: ____________________________

Phone Number: ____________________________

I will be calling the following parish families:

1. ______________________________________

2. ______________________________________

3. ______________________________________

4. ______________________________________

5. ______________________________________

6. ______________________________________

7. ______________________________________

8. ______________________________________

9. ______________________________________

10. _________________________________

11. _________________________________

12. _________________________________

13. _________________________________

14. _________________________________

15. _________________________________

16. _________________________________

17. _________________________________

18. _________________________________

19. _________________________________

20. _________________________________

21. _________________________________

22. _________________________________

23. _________________________________

24. _________________________________

25. _________________________________