

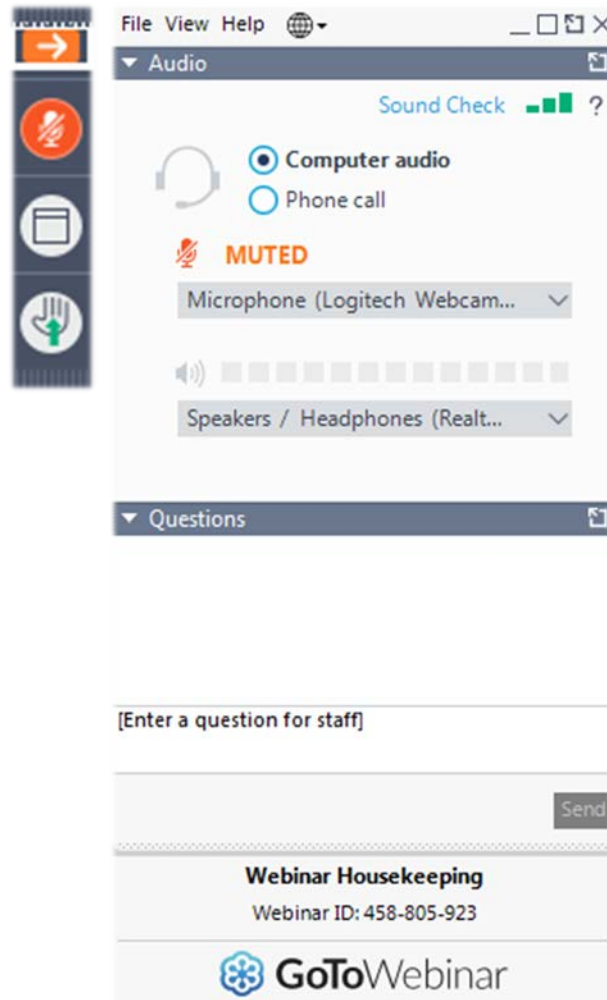


# CATHOLIC STEWARDSHIP IN UNCERTAIN TIMES: BEST PRACTICES DURING COVID-19

*CCS is a strategic fundraising firm. We partner with nonprofits for transformational change.*



# Logistics



To join audio:

- Choose “Computer audio” to use VoIP and listen through your computer
- OR
- Choose “Phone call” and dial using the information provided. International numbers available.

Throughout the webinar please type your questions here for discussion later

# OPENING PRAYER



# Today's Presenters

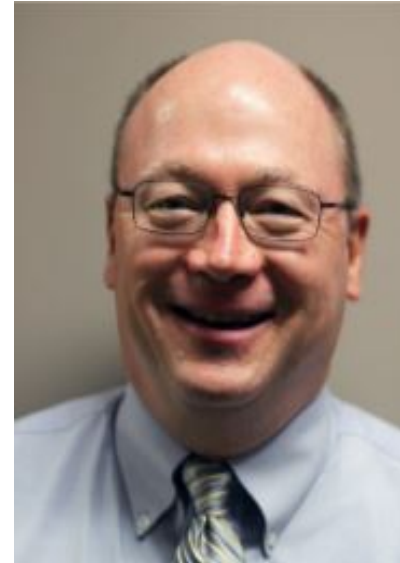
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**Thomas Kissane**  
Principal & Managing Director  
CCS Fundraising



**Peter Hoskow**  
Principal & Managing Director  
CCS Fundraising



**James Kelley**  
Director of  
Development Diocese  
of Charlotte

President *emeritus*  
International Catholic  
Stewardship Council



**Michael Murphy**  
Executive Director  
International Catholic  
Stewardship Council



**STEWARDING MAJOR DONORS  
DURING DIFFICULT TIMES**

**MICHAEL MURPHY  
EXECUTIVE DIRECTOR**

Face-to-Face interactions  
are Impossible in the  
short-term





Social distancing will prevent us from engaging donors one-on-one



**# 1**

**Show you care about your major donors.**



## Initial interactions with major donors are simple and low-key

- Be mindful of the immediacy to check on your major donors
- Secure your list of major donors with whom you wish to interact
- Create a timetable and schedule for yourself and colleagues
- Get to the phones and begin making calls
- Follow Jesus' command: "Be compassionate as your father is compassionate" (Luke 6:36).

Now we get to the phones



**# 2**

**Enlist your top diocesan leaders to communicate with major gift donors.**

Enlist your bishop  
to reach out to a  
select number of  
major donors



# Other diocesan leaders should be enlisted to communicate with major donors

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Bishop

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Auxiliary Bishops

---

Vicar General

---

Moderator of the Curia

---

Chancellor

---

Chair of the Diocesan Finance Council

---

CFO

---

Chair of the Presbyterial Council

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Other diocesan leaders

**# 3**

**Communicate the effectiveness of the diocese's strongest and most popular ministries.**

## Highlight the most effective diocesan ministries

Seminarians

Catholic schools

Youth and young adult ministry

Evangelization

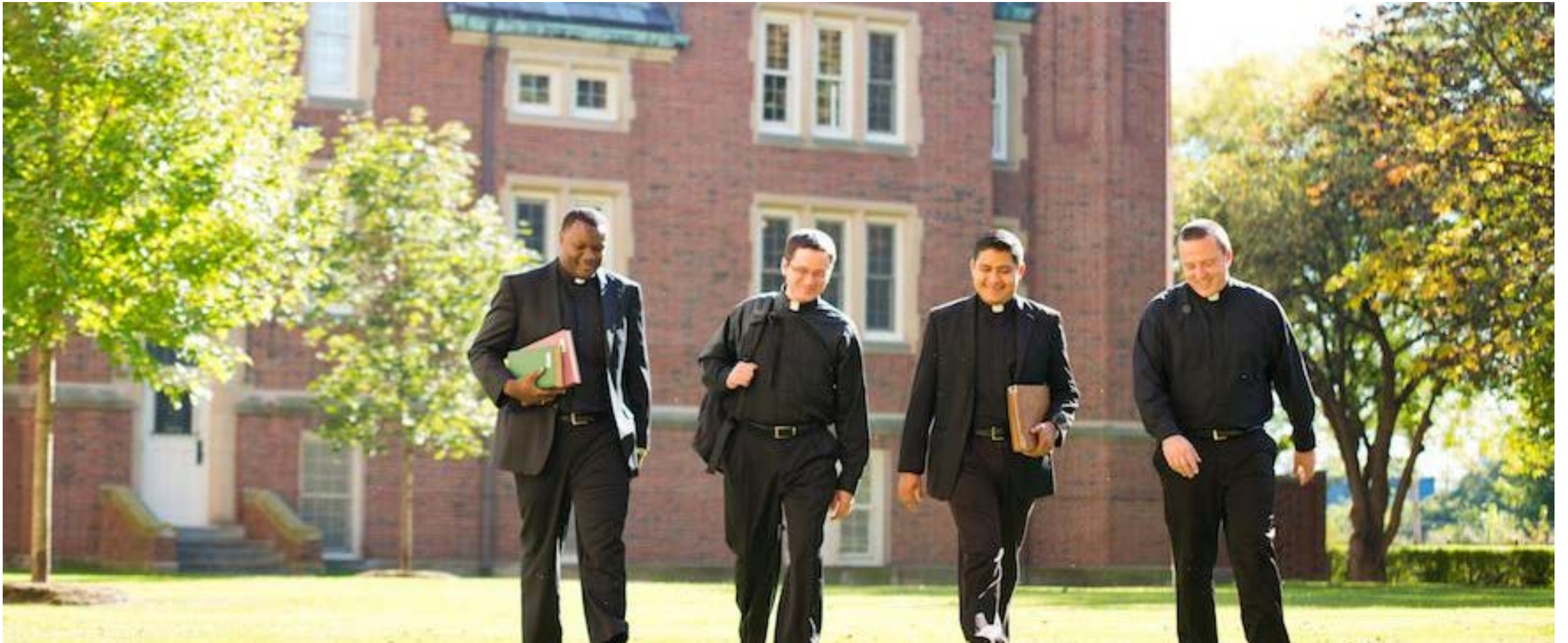
Senior priest care

Vocations

Sacred music ministry



Seminarian formation is one of the most effective diocesan ministries to highlight



**# 4**

**Communicate the essence of diocesan events in digital format.**





Give major gift donors an opportunity to see how their gifts are being used



Catholic school children offer a compelling reminder to pray that we will be able to gather again soon



# IMPLICATIONS OF THE CURRENT SITUATION

**TOM KISSANE**

# Timeless Principles for Fundraising

Concerns about the impact of Coronavirus (COVID-19) underscore the nonprofit sector's vital leadership role in the welfare of our communities. In light of the current and rapidly evolving circumstances, CCS offers the following timeless fundraising principles to remember and reinforce:



**Create an Action Plan**



**Avoid Wholesale Cancellation**



**Consider Special Briefings with Major Donors**



**Leverage Technology**



**Motivate & Show Empathy**

# 1. Create an Action Plan

Develop a plan of action, including a communications plan over the next several weeks, featuring an outreach initiative of personal calls and emails to key donors and friends.

**Sample 30-60-90 Plan**

Task		Month 1				Month 2				Month 3			
		Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4
1	Conduct video calls with all Board members												
2	Send email to entire database with updates												
3	Make personal calls to donors												
4	Make personal calls to key stakeholders												
5	Conduct webinar with donors and key stakeholders												
6	Write and post blog regarding current landscape												
7	Share updates on social media												



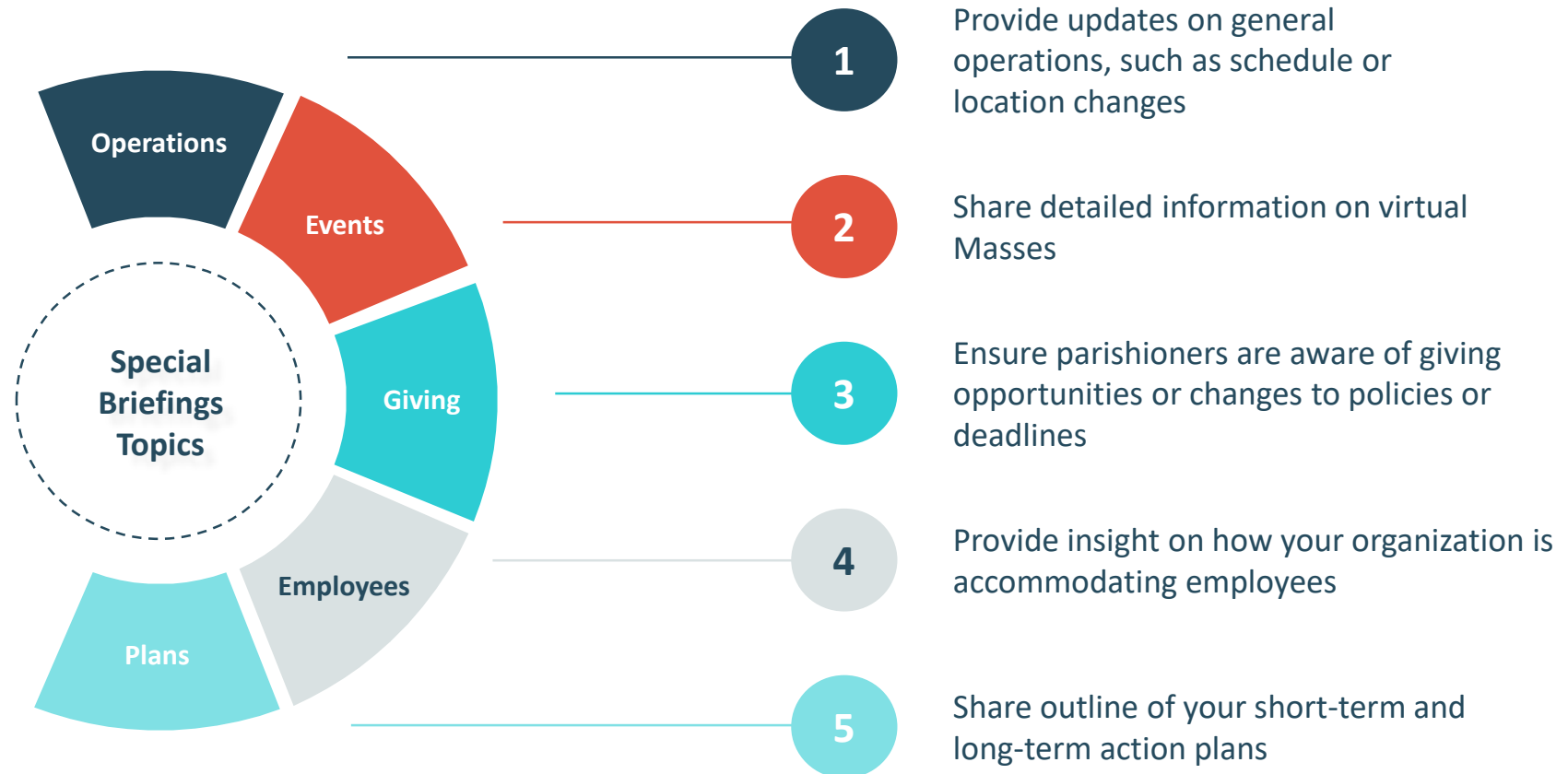
## 2. Avoid Wholesale Cancellation of Stewardship Plans

Adhere to your overall stewardship plans and strategies, with reasonable adjustments to your day-to-day meetings, events, and activities, depending on your local circumstances.

Event	Alternate Option
Donor Lunch/Meeting	Donor video or phone call
Weekly Team Meeting	Zoom meeting, shared Google document/SharePoint, daily phone calls
Forum/Conference	Webinar with emphasis on chat and polling features to increase interaction
Mass/Gatherings	Facebook Live Masses, Virtual Community Sessions

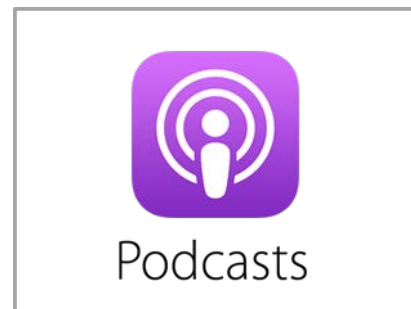
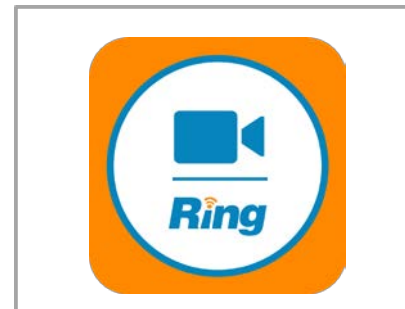
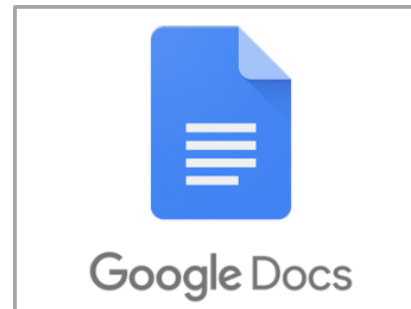
### 3. Consider Special Briefings with Major Donors

Consider hosting a series of teleconference briefings on issues pertinent to the current situation. Donors and constituents are interested in knowing how their diocese/parish are responding to the current situation.



## 4. Leverage Technology

Find ways to more effectively incorporate video conferencing, podcasts, or virtual briefings that make meetings more dynamic and create more personal experiences regardless of distance. Consider how social media or other virtual platforms can serve as temporary alternatives to in person convenings.



## 5. Motivate & Show Empathy



Generous Catholic Community



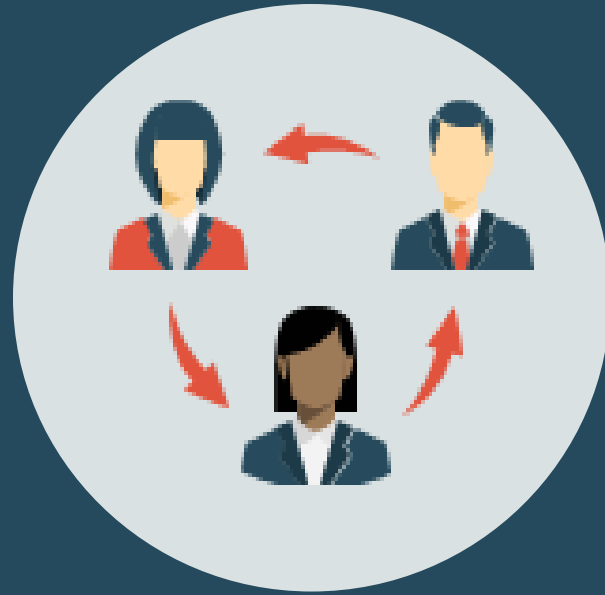
Opportunity to Participate for Engagement



Show Sincere Concern for Health & Safety



Respond and Reach Out



# ALL HANDS ON DECK: THE NEED FOR QUICK ACTION

PETER HOSKOW

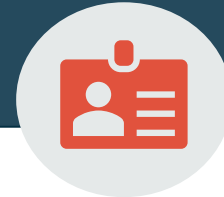
# Create an Online Offertory Page



Transition Typical In-Person  
Giving to Online Giving



Give Detailed Instructions



Communicate &  
Personalize Contact

# Pivot to Facebook Live Masses

To reinforce strategies and ensure that all parishes within a diocese are doing their part, stewardship leaders at the diocese must become the “arms and legs” of the diocese.





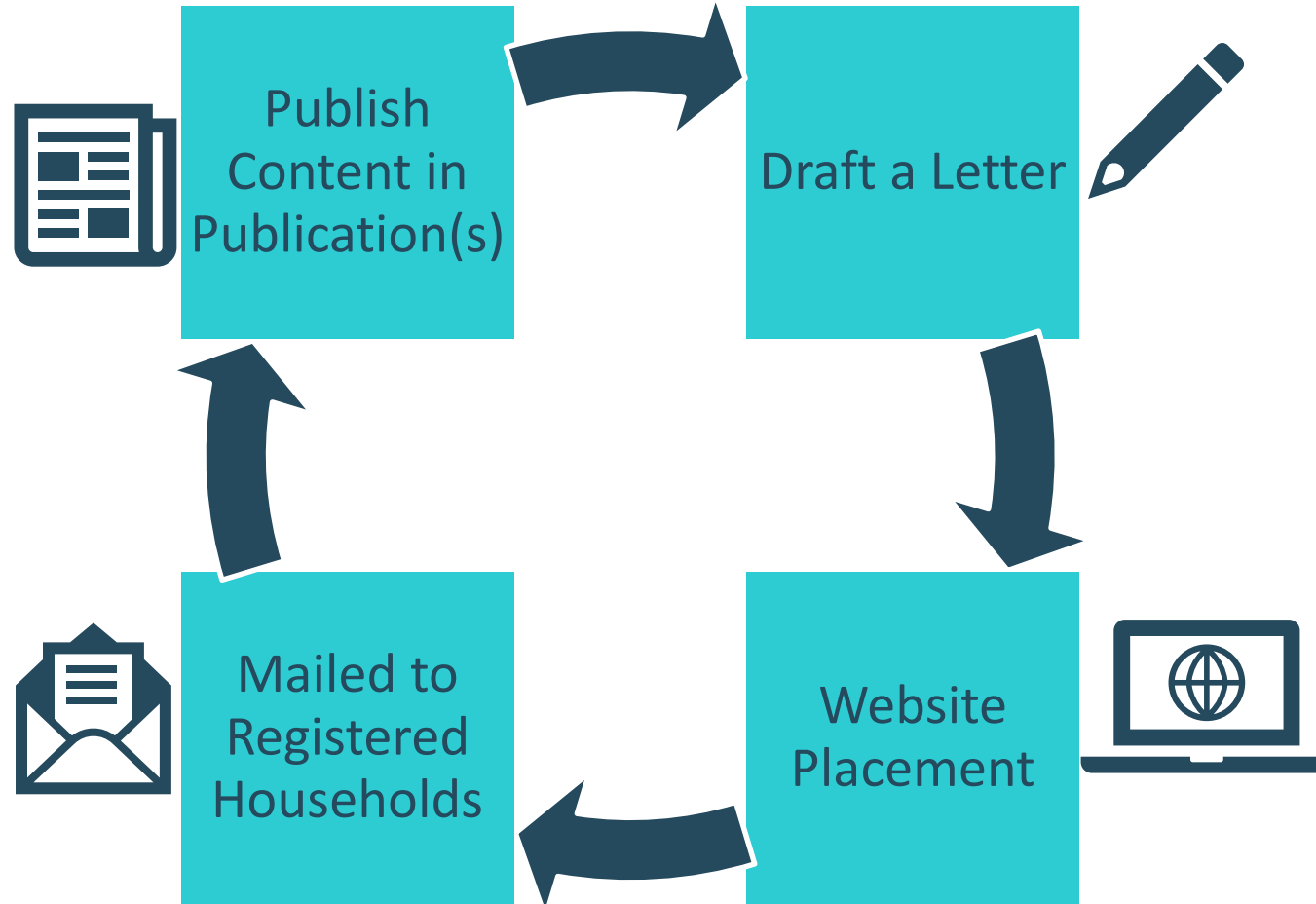
# COMMUNICATIONS STRATEGIES

**JIM KELLEY**



# Distribute a Bishop Letter

The letter was also placed in the Catholic News Herald for their March 27 edition



Bishop Jugis sent a letter to all the faithful on the coronavirus.

Sent to registered households (75,000) later next week.

The letter was put up on the diocesan website & Catholic News Herald website.

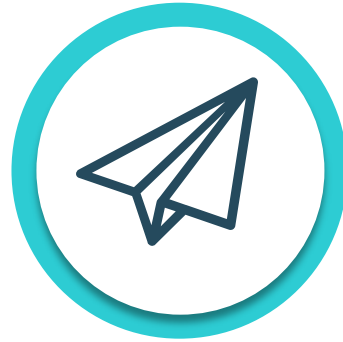
# Communication Tips for Parishes



## DRAFT A LETTER

- Modify it to meet your specific parish needs.
- In my 34 years working in the diocese, we have found in past crises, it is important to both connect with parishioners and to still request their financial support.
- Those who do this do much better than those who don't.

# Communication Tips for Parishes



## PUSH OUT A NEWSLETTER

- Monsignor Marcaccio from St. Pius Catholic Church created and shared.
- Father Putnam from St. Mark Catholic Church built on the message and also shared.
- These newsletters were put on the parish websites, emailed to parishioners, and were mailed on March 27 to their homes.
- Sending consistent communications using multiple channels is important.

# Communication Tips for Parishes

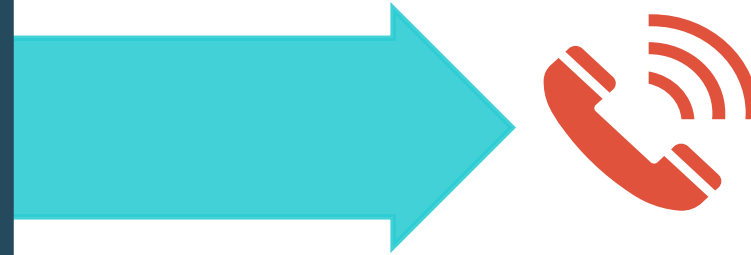


## KEEP IN TOUCH WITH PARISHIONERS IN NEED

- St. Pius and St. Mark both had staff and volunteers call over 350 senior citizens in their parishes.
- The volunteers asked them if they were doing okay and if they needed anything – medications, food, etc.
- They asked the seniors for their emails if the parish did not already have them. They asked them to call the parish if they needed any assistance. As I said, connecting with your parishioners is critical.

# Communication Strategies

**CREATE A SCRIPT FOR  
ANY PHONE CALLS  
(ESPECIALLY FOR THE ELDERLY)**



- St. Mark Catholic Church created an easy-to-follow script.

# Communication Strategies



- Immaculate Conception and St. Gabriel both had their pastors send messages through their website and YouTube.
- Can be done cheaply and effectively using phone (if better equipment isn't available).
- Allows you to reach a lot of people at once.

# Communication Strategies



- The editor of our Diocesan Newspaper, Patricia Guilfoyle, and I worked on an online offertory giving story. It included a story about the importance of giving and it listed every single parish in the diocese with their mailing addresses and a checkmark if they had online giving.
- In the online version of the Diocesan Newspaper this week, when people click on the story, the URL for every online giving portal at each parish is available.
- This story appeared in the March 27 issue of The Catholic News Herald.



# Communication Strategies



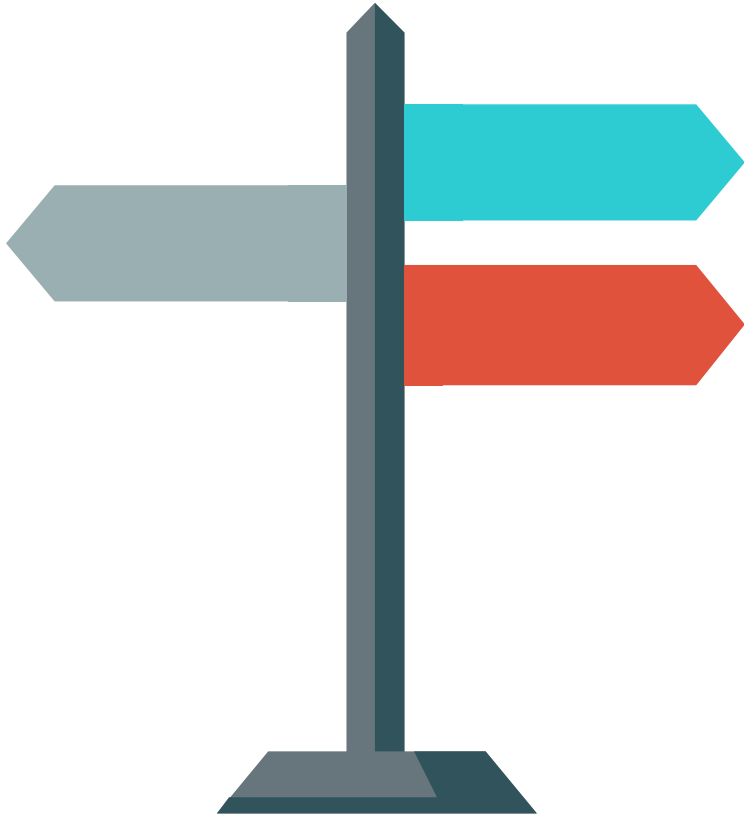
- As Pete mentioned, these are important.
- Our Diocesan Newspaper (in their March 27 edition) listed information on every parish in the diocese who had live Masses so people could see.
- These Masses are all available on each Parish's website.
- This is a way to make connections in the community and keep offertory going strong.
- Mention offertory during each live Sunday Mass like Father Larry Richards from St. Joseph in Erie, PA.

# Create & Share Guiding Principles



- In light of the current and rapidly evolving circumstances, the development office offered guiding principles around efforts for pastors, staff, and volunteer leaders.
- People follow leaders. I also know that we can't take a horse to water and make him drink but, we can make him thirsty, and that is my job and yours.

# Sample Guidelines



1. Don't make assumptions regarding parishioners' giving ability.
2. Despite the economic impact of the crisis, people still support their main causes where they feel the most attachment and the most connected.
3. We can't control events, but we can work toward greater control over creative responses to events.
4. Believe in abundance as Jesus tells us to do. Work to overcome your parishioners' perception of scarcity.
5. Encourage your parishioners to focus on gratitude because we still have so much to be thankful for. Spend time thanking parishioners.
6. As you always do as pastors, staff and volunteer leaders, point to Jesus for what's important. Encourage your people to focus on the Mass (even if it is online for now), scripture, prayer, faith, hope, love, family, friends, and those in need. Increase opportunities for people to grow in their relationship with Jesus and service to others.
7. Talk about the impact of your parishioners' giving.
8. Keep in touch with those in need in your parish – the elderly, the sick, etc. Let your parishioners know you value them and care about them. Offer resources that might be helpful to them.
9. Increase communication with parishioners. Keep them fully informed and deeply engaged. Use various communication methods – letters, newsletters, emails, phone calls, web sites, podcasts, virtual briefings, etc. Use multiple methods to communicate. Step up your outreach to your parishioners.

# Helping People Get Acclimated Online

I have received a number of calls from pastors who are not currently using online giving (approximately 25 parishes and missions)



**All Parishes and Missions**  
Should be Seriously Considering  
Online Giving



**We Compiled a List**  
of Seven Companies That Parishes  
Can Use for Giving

# Reaching Out to Those Who Haven't Given This Calendar Year

1.

Catholic Charities emailed 2,000 donors who hadn't given yet this year.

2.

By doing this, they received gifts between \$200 and \$10,000.

# Continue with Future Plans



## CONTINUE TO MAIL OUT CONTENT TO DONORS AND PROSPECTS

- We mailed out a Catholic Charities Newsletter on March 26
- We are still continuing to mail out our second Diocesan Appeal on April 13
- Mailing out Planned Giving Newsletter on April 20
- Have a letter going out from Catholic Charities to donors and prospects on April 27.

These four dates were already on the calendar.

# Messaging Strategies

Create and Share Best Practices

As the experts, the diocese should be distributing and continuing to tweak best practices for stewardship and giving with each parish.

Our office is continuing to gather best practices/ideas and we will share those with our parishes as we deem them appropriate. For example, mail an Easter card

Continue to Thank Your Parishes for Their Hard Work

Show appreciation for all they are doing and thank them for going the extra mile during this uncertain time.

Also continue to thank parishioners for their past and continued giving.

# Messaging Strategies



## SHARE SUCCESS STORIES

- Fr. Frank Cancro from Queen of the Apostles said that after a very "low" first weekend it appears they have reclaimed about 80% of their weekly giving because so many more people have signed in for online giving. They averaged about 30% of their givers from online donations previously. That is good news.
- Fr. Christian Cook of the Immaculate Conception said, like many pastors, he used version of our letter template to communicate with his parishioners. He also emailed me a YouTube offering to his parish regarding continued financial support



# Develop a Plan for Parish Financial Systems



The CFO of the Diocese of Charlotte developed a plan of financial assistance for parishes with limited financial resources.

# Q&A

# Contact Us

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**Jim Kelley**

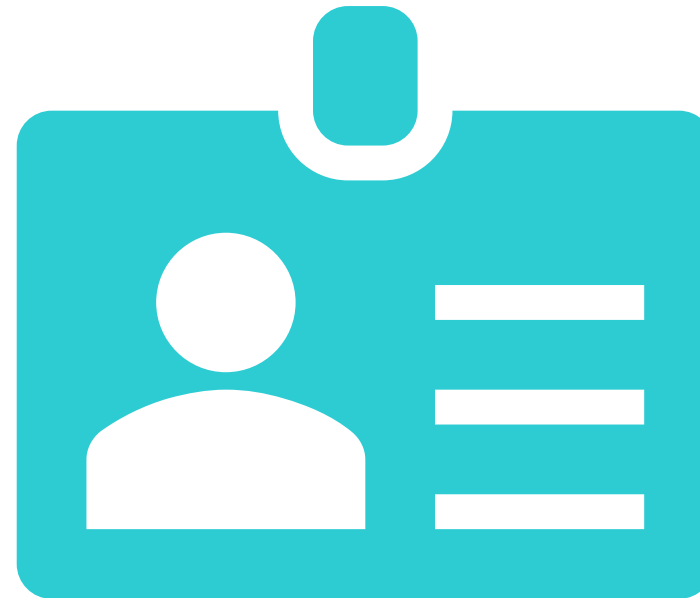
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# THANK YOU

