

## **RHONDA'S NOTES FROM ICSC**

### **SESSION 7: ABC'S OF MANAGING A DONOR PORTFOLIO: WHERE TO SPEND YOUR TIME FOR MAXIMUM EFFECT.**

**Speaker Mary Lou Ozimek, Assistant Exec. Dir. Catholic Community Foundation – Cleveland, OH**

Focus on deeper major donor relationships

Create specific personalized communication plans on a calendar and create donor specific plans

Major donor criteria:

- \$2,500+ annual giving with significant increases
- \$5,000+ annual giving
- \$10,000+ one-time check campaign
- \$25,000+ campaign giving

Define portfolio prospect pool by capacity to give, recency of gift, willingness to engage. Focus on top.

240,000 = 600,000 Catholics or 2,000 visits (campaign mode) made in 2 ½ years. Have relationship managers on staff. Without, lost opportunities for development money.

**Process: 150 qualified donors per portfolio/relationship manager (6 Touches Before Ask)**

1. Intro letter from Bishop
2. Phone call one week later
3. Email or personal note one week later – Impact story
4. Survey those who are non-responsive – what are their areas of interest?
5. Touch point again via phone/email
6. This process takes time and effort...
7. Ask

#### **Giving Tiers:**

A = High capacity, large gifts, engaged -reach out to 1x a month

B= Potential to give more -reach out to 8-9 months/yr.

C= Willingness to engage ---slow progress - reach out to 5-7 months/yr.

### **Sample Actions to take:**

Share impact stories from daily reading “You make a difference” stories

Seminarians in stories

Video clips

Mass Intentions for donor/family

Lenten booklet mailings

Request a donor testimonial

Saint Day card, birthday card

- IF asking letter has an amount chart...note that we ask major donors for a “major leadership gift” never listing a dollar amount. Print these personal letters in-house.
- Emphasis Qualified Donors – some donors will write a check, yet they do NOT want a relationship
- Think about donor relations/needs: \$10,000+ meet with Bishop, \$25,000+ offer a special noon Mass with lunch reception, etc.

### **SESSION 16 – 6 FUNDRAISING AUTOMATIONS THAT WILL BLOW YOUR MIND.**

**Speaker: Nic Prenger, CEO Prenger Solutions Group - Omaha, Nebraska.**

Automation ideas: instant gift alerts – Ding! “Donor gift has arrived” triggers the flow. Everyone is resource strapped and everyone needs to be a Relationship Manager. Draft heartfelt donor emails. (Kansas City and Denver given a shout-out for emails) everything should now be automated! Auto flow, auto response, yet make custom to donors. Streamline gift acknowledgements Save staff time.

#### **Suggestions:**

- Thank you letters
- \$5,000+ gifts get Cardinal’s signature
- Automatically mark gift acknowledgments
- Create year-end tax statements – complete with summaries and attach to email or in body of email.
- Convert manual recurring gifts to automatic recurring gifts w/Automate Genius – service and monitor
- Do a Friday afternoon database clean-up... new donors, Fix “all caps”, and see Giving Societies/Tiers

- Nic's company offers Microsoft 365 = \$4/month to build it by AutomateGenius.com
- Set-up ringless voicemails to thank donors for their gifts
- Generative AI – will work for Catholic social media
- Make gift processing easier and automatic with a personal connection

**SESSION 21 – USING ENGAGEMENT TO POWER ALL ASPECTS OF YOUR STEWARDSHIP EFFORTS. Speaker: Steve Homiak, Director of Parish Support and Annual Campaigns, Archdiocese of Seattle, WA.**

**Engagement = Belonging**

**Attitude = “YES! I belong here!”**

Use social media, website, mail, mobile apps, email and online giving to share for a robust and healthier spirituality and engagement. Involved parishioners attend Mass, go to Confession, participate in Donut Sunday and make \$2 donations!

What is engagement?

- Strong emotional connection
- Spiritual commitment
- Spiritual health
- Means to an end (Discipleship)
- A way to measure and identify what parishioners like

**ACTIVELY ENGAGED:**

**TOURISTS THINK:** What's going on at church this weekend? Should I attend? How can I help?

**ACTIVELY DISENGAGED:**

**TERRORISTS THINK:** How can I complain? Why are they doing this? Who decided that?

**Focus on causes to influence outcomes:**

- Mass attendance
- # of money raised in pew, online, annual appeal, Fall Festival
- # of people watching live stream

**What is the impact plan? Do you have one? Create one!**

- Drive engagement
- Increase spirituality
- Increase commitment
- All outcomes grow

**Know that parishioners are asking themselves these questions about the parish and Mass:**

- How can we grow spiritually?
- Do I belong?
- What do I give?
- What do I get?

**Think about what newcomers want and need:**

- Can I take coffee in to Mass?
- Do I have to go to confession?
- When is confession and where does the line form?
- Where do I find a church that fits me?
- Where do I park?
- What entrance do I go in?

Belonging leads to believing. Increased engagement = Increased spiritual health  
If Plan A doesn't work, remember that there are 25 other letters....

## **SESSION 36 - USING RESOURCES WISELY.**

**Speaker: Amy Ponson, Exec. Dir. Catholic Foundation of S. Louisiana, Diocese of Houma.**

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Think about brand recognition...and the trajectory of any appeal. Who is the audience? Know them. Older generations prefer direct mail, online giving, in-pew materials and are the planned giving target market. The younger generation prefers messages via text, digital media, and giving when made easy. Digital media must be in the mix for all ages. Hybrid approach: FB, LinkedIn, X, QR Codes, Google ads, etc.

Men typically give to retired priests and seminarian campaigns.

Women have a soft spot for Catholic schools and children.

Lead lists? Only purchase what you need. Clean up your own data. Keep it current and timely.

Focus on IMPACT and MINISTRY. Listen to the priests challenges. Listen from the pew.

## **TUESDAY OCTOBER 3 - DAY 2**

### **SESSION 47 – DON'T YOU KNOW ME? IMPROVING THE DONOR ONLINE EXPERIENCE = MORE PERSONALIZATION + LESS FRICTION**

**Speakers: Bridget Daly: VP Bus Dev & Vern Sebbby” Sr Acct Exec for GiveCentral, Chicago**

40% increase in results with personalization

Over 60% of online pages viewed on mobile devices

Always use the donors name, customize each ask, customize acknowledgements.

Have specific missions---seminarians, priest retirement, CSO, etc.

Use customized links for QR codes

#### **POWER OF SUGGESTION:**

For an annual appeal – show donor's 4 yr. history, total and average. ASK for 30% increase.

One-click giving (Smart Give) use secure links, open rates above 55%, meet donors where they are, Use an online donor database and see what happens.

Provide updated newsletter, prayer cards, and be mission oriented, include prayer requests, etc.

## **SESSION 51 – A PARISH STEWARDSHIP TOLL KIT TO SUPPORT YOUR STEWARDSHIP JOURNEY**

**Speaker: Jane Baldwin, Dir. Of Religious Ed – Epiphany Cathedral, Venice, FL.**

Educate, train, support and recharge ministry work, staff and volunteers. WE LOVE OUR PARISH FAMILY! Have an assigned staff liaison to all ministries. Monthly, quarterly or weekly Stewardship eNewsletter or a column in the Bulletin? Include policies and procedures, best practices.

Training + Expectations = Effective Work

Ideas: Adopt a Patch (Garden on site)

Leaders & Co-Leaders plan for the future....continuation when ministry is successful and serves a purpose and need in the parish community. Need a manual with policies and procedures. Mission Statement too. Start and end meetings in prayer. Goals should be: **SMART**:

**S=specific M=measurable A=achievable R=Relevant T=Time bound**

Have a book in the narthex “Welcome Book” for folks to sign-in. WELCOME TO GOD’S FAMILY.

Motivate people to attend and stay... become engaged.