LOCAL CHURCH CAMPAIGN MANUAL

Transforming Churches • Transforming Lives

SOUTHEAST CONFERENCE
UNITED CHURCH OF CHRIST

CAMPAIGN OFFICE:

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Lake Geneva, WI 53147

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I. <u>INTRODUCTION</u>

This workbook provides a step-by-step process for local church participation in the Southeast Conference United Church of Christ Campaign. The procedures which are outlined and explained herewith should be applied to a local church capital campaign and can be easily applied to your church's on-going stewardship program as well. Followed closely, it will lead you and other members toward at least three important objectives:

- Greater personal growth through understanding that giving is, after all, a grace given each of you by God.
- A deep sense of satisfaction in giving of yourselves to support more fully Christ's mission everywhere.
- A greater awareness of the potential within the congregation so that together you may reach a higher level of stewardship in the future.

II. <u>ADVANCE PREPARATION</u>

A. <u>Determine the Type of Campaign</u>

The first thing you will need to consider is the type of Campaign you will be conducting. Remember, experience has proven that the best results have been achieved when the Local Church ties in a local need with the Conference effort as a combined Campaign. <u>NOTE</u>: Please do not hesitate to contact the Campaign Office at 800-903-1535 when determining the type of Campaign to conduct. Please refer to pg. 17 of this manual for Church Pledge / Payment Methods.

Here are the options:

1. <u>COMBINED CAMPAIGN</u>: **<u>This is the best and most highly recommended way to conduct your Campaign</u>**. This Campaign involves conducting an every member Campaign for the local church needs and combining this with the Southeast Conference Campaign commitment (goal accepted) being included as the outreach and mission portion of the Campaign. Every church has needs – whether it be building, maintenance, programs, endowment, etc. This Campaign has had the most success because there is something in it for the local church as well as the wider church. We recommend that you develop one pledge card for this effort.

2. <u>CONFERENCE CAMPAIGN</u>: This type of Campaign is conducted for only one objective – the Southeast Conference Campaign. No local church needs are included. An every member Campaign would be conducted. Pledge cards are available by calling the Campaign Office at 800-903-1535.

3. <u>CONFERENCE CAMPAIGN & BUDGET ITEM</u>: This type of Campaign is basically the same as the Conference Campaign (#2) but it has the church also including an amount in its budget as well to fulfill its pledge to the Southeast Conference Campaign. An every member Campaign would be conducted. Pledge cards are available by calling the Campaign Office at 800-903-1535.

4. <u>BUDGET ITEM</u>: This option has the church putting the pledge it makes to the Southeast Conference Campaign in its budget as a line item. If the church chooses this option, it is highly recommended that the church conduct Awareness / Education Meetings so that all members are fully informed and educated about the Southeast Conference UCC and its Campaign.

B. <u>Enlist a Campaign Coordinator</u>

The Campaign Coordinator will be responsible for supervising the development, implementation and coordination of all Campaign activities (enlistments, promotional material, meetings, etc.). The Coordinator will need to keep the urgency of the Campaign at the forefront with all volunteers.

C. Enlist a Secretary

The Campaign Coordinator will need to make arrangements for the preparation of certain materials and information and therefore will need the assistance of a secretary. This person may be a regular employee of the church or a volunteer.

D. Enlist the Campaign Steering Committee

The Campaign Steering Committee will assist the Campaign Coordinator in planning the Campaign in your church. This Committee up front will make all key decisions in regards to the enlistment of Congregational Chairs and other key leaders of the Campaign. Its membership should consist of five to ten members, including the Campaign Coordinator, Congregational Chairs, Supporting Committee Chairs, and Minister/Pastor, ex-officio and others who can enlist and motivate fellow members. Meetings of this Committee should occur every other week through the Kick-Off of the Campaign and at the call of the Campaign Coordinator thereafter.

E. Enlist the Congregational Gifts Chairs

This is the quality job of the Campaign, and more often than not, the measure of the degree of success. The Congregational Chairs should be persons of proven capabilities. The Congregational Chairs should be persons of power and influence and have a willingness to use it. The number of Congregational Chairs is dependent upon the number of family units. (Please see pg. 6)

F. Update the Church Roll

There may be some churches whose church membership rolls will need to be up-dated because of recent accessions, removals or death. Be sure you have an accurate list of members, including correct addresses and telephone numbers.

G. Prepare Two Sets of File Cards

If you want to do the management of the Campaign manually, you can do this by using 3 x 5 file cards, print labels or type / print the correct name, address and phone number of each church member (Family Unit).

The other set will serve two functions. The Prospect Review Committee will use these cards for the purpose of evaluating the prospects (Family Units) by gift levels and the identification of potential leaders and visitors.

Once these cards are organized, they are your pool of prospective volunteers - (it will eliminate the possibility of the Congregational Chairs asking the same person twice when enlisting Team Members). When the Congregational Chairs meet, they will want to select the cards of the persons they wish to enlist. Each Congregational Chair should only choose the number of Team Members needed. If more names are needed, the Congregational Chairs can select new names from the Coordinator. Any unused names should be returned to your file and the cards of those who refuse to work should be so noted to avoid additional contacts.

NOTE: For those churches who would like to computerize the Campaign, there is fund-raising software available (at an additional discounted cost of $500.00) to manage your Campaign and post-Campaign collection period. If you are interested in computerizing your Campaign, please call the Campaign Office and inquire about CMS Fund-Raising Software at (800) 903-1535 or you may go to the web page at www.cmssoftware.net. **All forms mentioned in this Manual will not be needed if you utilize the**

CMS software.

H. Prepare All Standard Forms

Samples of the forms needed are appended.

I. Order Pledge Cards

If your church is only conducting a Conference Campaign, pledge cards are available and may be ordered from the Southeast Conference Campaign Office by calling (800) 903-1535.

If your church is conducting a combined Campaign (Conference + Local), please use the Conference pledge card as a guide.

III. CAMPAIGN ORGANIZATION

A. Gifts Division

It is recommended the Campaign be organized into one Gifts Division:

Congregational Gifts Division - All who are considered church members (Family Units) will be considered prospects for the Campaign.

B. Supporting Committees

Four supporting committees are given specific functions necessary to complete the Campaign organization:

1. **Treasurer / Auditor** - All pledges and payments should be transmitted through the church treasurer. It is highly recommended that the Campaign Steering Committee enlist an Auditor to assist in the audit and reconciliation of completed pledge cards and payments as a cross check. If it is just a Conference Campaign, all checks should be designated to the Southeast Conference UCC Campaign. If it is a combined Campaign, all checks should be designated in the name of the church.

2. **Promotion Committee** - This committee is responsible for:

   a. Informing the entire congregation of the needs of the Campaign by utilizing the Southeast Conference Campaign Video and Brochures provided to the church;

   b. Maintaining a continuous program of information about the progress of the Campaign in the local church by utilizing all media option (Bulletins, Newsletters, Website, etc.);

   c. Handling all arrangements for Campaign functions.

   To help carry out these responsibilities, the Promotion Chair should appoint one sub-Chair to handle meeting arrangements. The Promotion Chair may wish to add one or two others to make up the total committee. The Promotion Committee should meet during the first week of the Campaign activity.

3. **Prospect Review Committee** - This committee is responsible for: a) determining the suggested asking amount or range of each Family Unit; b) deciding on who is the "right person" to make the visit; and c) the identification of potential Campaign leaders and visitors.

This committee may be comprised of the Campaign Steering Committee, a sub-committee or a separate committee. Due to the function of this committee, **its members should remain anonymous**.

4. **Planned Giving Committee** - This committee is responsible for coordinating and designing all planned giving efforts during and after the Campaign. Planned Giving is a way to enable your members to make larger gifts to your church that they could not make from their income. While some planned gifts provide a life-long income to the donor, others use estate and tax planning techniques to provide gifts to their church in ways that maximize the gift and/or minimize its impact on the donors estate. It is advised, if possible, to enlist members with legal, accounting, and insurance expertise or estate planning background. The Planned Giving Committees job is never done. This committee should continue to operate in perpetuity. To order planned giving materials from the National UCC Office, please call 800-846-6822.

5. **Follow-up and Collection Committee** - This committee will be responsible for supervising the collection of pledges throughout the payment period, following up with prospects who asked to be contacted at a later date, and giving new members the opportunity to participate in the Campaign.

IV. STANDARDS OF GIVING NECESSARY FOR SUCCESS

The success of your Campaign depends upon the attention paid to standards of giving necessary to produce the amount required. We, therefore, urge you to give strict attention to the kind of gifts needed to reach your goal.

Extensive fund-raising experience proves that one-third or more of the objective must come from 10 gifts; that the next one-third must come from 20 to 40 gifts; and, that the remaining one-third will come from everyone else.

For example: Suppose your church goal is $50,000. Needed gifts should approximate the figures in the chart below for a church of 150 Family Units.

NUMBER OF GIFTS	GIFT AMOUNT (OVER 3-5 YEARS)	TOTAL	CUMULATIVE TOTAL	
1	$ 5,000	$5,000	$ 5,000	10 GIFTS FOR 35% OF THE OBJECTIVE
1	2,500	2,500	7,500	
1	2,000	2,000	9,500	
2	1,500	3,000	12,500	
5	1,000	5,000	17,500	
8	750	6,000	23,500	38 GIFTS FOR 34% OF THE OBJECTIVE
10	500	5,000	28,500	
20	300	6,000	34,500	
40	200	6,000	42,500	
50	100	5,000	47,500	
NUMEROUS BELOW	100	2,500	50,000	

NEVER, NEVER make the mistake of assuming that you can reach a goal by asking for an equal amount from each member. You will not reach your church's goal, and the Southeast Conference UCC Campaign will not receive the financial support it needs for a successful Campaign.

NOTE: Please call the Campaign Office at 800-903-1535 and we will be glad to prepare a Standards of Giving Chart for your Campaign. When you call, be prepared to give us the number of Family Units and the dollar goal for your Campaign.

Large amounts of money are not raised by casual asking --- "anything you can spare will be okay". Leaders must know what Standards of Giving are the minimum required to produce success; and further, that the number and size of gifts needed, do in fact exist.

A fundamental of fund-raising therefore, is the identification and correct evaluation of prospective donors in sufficient numbers and at the levels prescribed in the Chart of Standards. A safe margin would be three to five prospects for each gift needed.

The Prospect Review Committee is the instrument through which you determine giving ability (suggested asking amounts). During the Prospect Review process, you will: 1) determine a Suggested Giving Level (SGL) for each Family; 2) suggest whether a certain individual would be a good volunteer; and 3) determine the best person to visit each member. (If you have not done so already, please call the Campaign Office to order the Standards of Giving Chart for your church.)

V. THE PERSONAL VISITATION CAMPAIGN

A. Determine the Size of Campaign Organization

The most effective structure for personal visitations is based on the concept that no one leader or worker should be heavily burdened. Experience has shown that a ratio of one to five is close to the ideal . . . each Team Member calling on five members, each Chair enlisting and soliciting anywhere from four(4) to five(5)

Team Members. **<u>No Campaign volunteer(s) should solicit anyone else until they make their own pledge first</u>**.

The following chart illustrates how many Chairs and Team Members you will need based on the number of Family Units.

CONGREGATIONAL GIFTS DIVISION				
No. of Family Units	Cong.'l Chairs Needed	No. of Team Members Each Chair Needs to Enlist	Total No. of Team Members	No. of Families Team Members to Visit
20	2	2 each	4	3-4 each
45	2	4 each	8	4-5 each
60	3	4 each	12	4-5 each
75	3	4-5 each	14	4-5 each
100	4	5 each	20	4-5 each
125	5	4-5 each	24	4-5 each
250	8	5 each	40	5-6 each

B. <u>Recruit the Campaign Organization</u>

The Congregational Chairs should review the file cards which were prepared in advance and from them select prospective Team Members. As soon as the Team Members are recruited, the Congregational Chairs should report the names to the Campaign Office at the church.

The Congregational Chair's responsibilities are as follows:

1. To enlist four(4) to five(5) Team Members who will agree to attend a meeting and personally call on four(4) to six(6) other members.

2. To solicit these Team Members for their own pledges.

3. To encourage attendance at all meetings.

C. <u>Follow a Promotional Build-up Calendar</u>

Following those suggestions that relate to the role of the Promotional Committee, develop a promotional calendar necessary and suitable to your church.

D. <u>Launch the Campaign</u>

Plan a special service or event at the beginning of the Campaign to supplement other promotional ideas included in this manual.

E. Assign Prospects

All remaining Family Units will be assigned to the Team Members by the Pastor and the Congregational Chairs prior to the training meeting. Each Team Member will be assigned five(5) to six(6) Family Units to visit with. This is an important step in making sure the church raises its maximum potential during the Campaign. This meeting should take place three weeks prior to the Team Member Training Meeting.

F. Train Team Members

Schedule a training meeting for all Team Members as close as possible to the launching event. Attendance at the training meeting is essential if the Team Members are to do a good job of interpreting the needs and seeking gifts. For those who absolutely cannot attend, a smaller make-up session should be planned. Untrained Team Members should not make calls.

G. Use the Two Call System

Asking for gifts should begin as soon as possible after the training meeting. An excellent way to finish the Campaign quickly is to ask all Team Members to make their calls on the Sunday afternoon following the training luncheon, which in turn follows the special service or event.

We strongly recommend that your Campaign be conducted on the TWO CALL PLAN. This provides for two visits in each home rather than one. During the first call, the Team Member presents the Campaign material and explains the exciting programs / plans of the Local Church and Southeast Conference UCC Campaign. This is the educational emphasis of the Campaign and the challenge we hope to bring into each home. The family's participation in the Campaign is not mentioned until the very end of the first visit and then only as a suggestion for them to "think and pray" about their commitment to this program. Their decision will be asked for two-three days later in a second brief visit, by appointment. Please set this second visit appointment before leaving the first visit.

H. Report Progress

One of the most important aspects of a Campaign is to keep everyone informed as to progress. Once the solicitations have begun, telephone follow-up should be made and progress bulletins should be sent regularly to all Team Members, keeping them posted on progress and reminding them of visitation deadlines. We would recommend that you do not announce the Campaign dollar total until 90-95% of the pledge cards are reported. Instead, use a participation thermometer during the Campaign to encourage 100% participation.

I. Acknowledge Pledges

As soon as gifts and pledges are received, be sure a card or letter of thanks is sent. These should be signed personally by the Pastor or person appointed (i.e. Campaign Coordinator). The pledge card itself is designed so that payments on pledges may be recorded as received.

J. To Insure a "Winning" Campaign

1. Follow-up should be done with those members who asked to be recontacted at a later date.

2. Those members who gave a one-time gift should be contacted on the anniversary date of their gift for another gift or long-term commitment.

3. New members of the congregation should be given the opportunity to participate in the Campaign.

4. Use your church newsletter, bulletins and website to inform your congregation of Campaign progress and remind them of their pledges.

K. Thank Your Volunteers

A letter from the Congregational Chairs should be sent to all Campaign volunteers thanking them for their participation and praising them for a job well done.

VI. ASSIGNMENT MEETING PRIOR TO TEAM MEMBER TRAINING MEETING

Pre-assigning members to the Team Members is the best way to get optimal results. All remaining Family Units will be assigned to the Team Members by the Pastor and the Congregational Chairs prior to the training meeting. The Congregational Chairs should assign five(5) to six(6) Family Units to each Team Member. The Congregational Chairs should first take into consideration the volunteer name suggested during the Prospect Review process. If no name was suggested, try to assign the Family Units to the Team Members being asked for similar dollar levels (either equal to or lower than if at all possible). This is an important step in making sure the church raises its maximum potential during the Campaign.

The Prospect Assignment Meeting should take place at least three weeks prior to the Team Member Training Meeting. This will give the Campaign Secretary enough time to prepare all of the materials needed for the Team Member Training Meeting.

TO ASSIGN PROSPECTS TO THE TEAM MEMBERS:

A. Have the Congregational Chairs write each of their Team Members names on the Prospect Selection Form (one for each).

B. Determine who the strongest Team Members are under each Chair and remember to assign accordingly.

C. Assign the prospects to the strongest volunteers first and then using the second criteria of aligning by asking figures. NOTE: We recommend that you do not assign friends to friends or family to family unless they are determined the best person to visit.

D. Please have the Congregational Chairs print clearly the prospects name on the appropriate Team Members Prospect Selection Form. NOTE: All Family Units should be assigned.

E. Once you complete this process, turn the Prospect Selection Forms over to the Campaign Secretary so they can complete the Volunteer Assignment Form for each Team Member.

VII. TEAM MEMBER KICK-OFF TRAINING MEETING

Several steps must be taken in order to ensure the success of the Training Meeting. These are:

A. Provide as much advance notice of the dates as possible. Ask your Congregational Chairs to assist you by informing the Team Members when they are enlisted that they are expected to attend the training meeting. Ask the Campaign Secretary to send reminder cards by mail or email several days before the meeting is held or call one day prior to when the meeting is held.

B. Individualize each Team Member's packet and enclose the following materials:

- Campaign Brochure
- Team Member Instructions
- Pledge Cards (for all prospects assigned)
- Volunteer Assignment Form

C. It is often advisable to arrange for teams to be seated together.

D. Begin on time, and begin with a brief word of prayer.

E. Have your Campaign Coordinator, Pastor or Congregational Chairs present background information regarding the Local Church and the Southeast Conference UCC Campaign. The Case For Support and/or Campaign Brochure are the best guides to do this. If available, also show the audio-visual presentation. Review the Campaign promotional material.

F. Review how to complete the pledge card. Enclosed in each Team Members packet are the assigned pledge card for each family they are visiting. The Team Member should give careful attention to the following instructions:

   1. Be sure the family's name and address are correct.

   2. Be sure to review with the donor that each item is completed: the total amount of the pledge, the terms and the beginning date of payments.

   3. Be sure the box entitled "Total Gift" indicates the total amount of the pledge, and that any payments on the pledge (partial or complete) is shown as "Paid Herewith".

   4. <u>Make certain the pledge card has been signed and dated by the donor</u>.

   5. A security envelope is enclosed for each pledge card in the Team Member packet for the member to enclose their completed pledge card.

   6. If you wish to have a well-managed Campaign, it is recommended that you use the Volunteer Assignment Form. One copy should be put in the Team Members packet and the Campaign Coordinator should keep a copy to track each Team Members progress.

G. <u>Role Playing</u> - Use your creative imagination to role play the following events:

   1. Asking for an appointment.
   2. Explaining the Campaign.
   3. Asking to prayerfully consider the gift.
   4. Answering objections.

   You may wish to type cast your volunteers into such role characteristics as:

   1. Benignly disinterested.
   2. Curious.
   3. Protective of their dollars.
   4. Somewhat hostile and assertive.

   Don't let each role-event go for more than three to four minutes. Call time. They'll get the flavor, and have an enjoyable time in the process.

   Make the following points:

   1. <u>Never</u> lose your cool or your temper - no matter what the provocation.

   2. <u>Never</u> argue, but it is appropriate to suggest alternative understandings and interpretations.

   3. Be positive.

   4. Expect the best.

H. Share the Campaign timetable and deadlines with your volunteers.

I. After a time of questions and discussion, close with a prayer.

VIII. <u>**CAMPAIGN PROMOTION**</u>

In most congregations, few people are fully aware of the Southeast Conference UCC Campaign. Unless the needs are interpreted in an interesting persuasive manner, the Campaign may fall short of its goal. On the other hand, adequate interpretation can produce a new understanding of the Mission goals of the Southeast Conference and result in a Campaign that exceeds these goals. Every available channel of communication should be utilized to the fullest.

A. <u>Launching Event</u>

One of the best ways to inform, as well as interpret a new program is to get as many church members as possible to attend a special service to be scheduled just before solicitation begins. As an alternate, a congregational lunch or dinner might be held as the launching event.

Action required by the Chair of the Promotion Committee:

1. Consult with the Campaign Coordinator about a special service, lunch or dinner; set a time and place.

2. Work with the Campaign Coordinator and Congregational Chairs in the preparation and mailing of letters which promotes the launching event.

3. Arrange for a mutually acceptable date for the congregations presentation of the Campaign audio-visual.

4. Have the Promotion Chair organize a committee (one member for each fifteen families) to call all who have not made reservations for the dinner, urging attendance, or to call families who often miss church, urging them to attend.

   The list of members may be assigned to the callers, or committee members may select names they wish to call. One meeting of this committee would be helpful in accomplishing its objectives.

B. <u>Campaign "Alerting" Letter Sent to All Families</u>

This letter should be sent well before the active phase of the Campaign. (See sample appended.)

C. <u>Special Information at Church Services</u>

Certainly one of the most effective ways to interpret the Local Church and the Southeast Conference UCC Campaign is during regular Sunday services. This can be done in several ways:

1. Bulletin inserts - a series of bulletin inserts may be used on succeeding Sundays.

2. Lay speakers - on each of the Sundays that the bulletin inserts are used, a Campaign leader should be asked to speak for three to four minutes on the Campaign and the progress being made and why their participation is important.

3. As noted above, a special Sunday Service just before the congregational solicitation begins will add meaning to the total effort and set it in proper perspective. The Congregational Chairs of the

Campaign might speak briefly, and there should be a dedication of workers service. The sermon should be devoted to Mission and Evangelism which the Campaign will accomplish.

D. Special Programs at Meetings of Organizations

The Southeast Conference UCC Campaign Video or a volunteer speaker (from the church) should be offered wherever possible to each organized group in the church - women's and men's organizations, couple's clubs, young adults, teen-age groups. Arrangements should be made as far in advance as possible, as these programs are usually planned well ahead.

E. Promotion in Church Newsletter or Website

The regular use of the church newsletter or website is an excellent way to promote the Campaign.

F. Youth Committee to Make Posters

This is an excellent method of gaining understanding of the Mission on the part of the youth of the congregation. After the posters are made, the youth committee could also be responsible for displaying them in various locations.

G. Use your creativity and the special "people resources" of your congregation, i.e.

- those who have had some past experience with the Conference, or
- those most knowledgeable about the Conference to help interpret the Campaign.

If you need help on planning any of these or would like additional suggestions, please call or write the Campaign Office:

Southeast Conference UCC
Campaign Office
1160 Lakeview Court
Lake Geneva, WI 53147
(800) 903-1535

IX. PLANNING CALENDAR

Good planning requires time and preparation before the Campaign is presented to your members. The open planning calendar of events that follows is for your convenience. You may adapt as your own situation requires. However, it is a plan which will give orderly management to your Campaign.

Use the Suggested Timetable to set up your calendar of events.

SUGGESTED CAMPAIGN TIMETABLE

ADVANCE PREPARATION	✓ CHECK WHEN COMPLETED	TARGET DATE FOR COMPLETION	RESPONSIBILITY
1. Enlist Campaign Coordinator			Pastor / Moderator
2. Enlist Campaign Secretary			Pastor and Campaign Coordinator
3. Enlist Campaign Steering Committee			Pastor / Moderator and Campaign Coordinator
4. Review Membership Roll			Pastor and Campaign Coordinator
5. Prepare two sets of 3 x 5 file cards of members or computerize. (Call Campaign Office at 800-903-1535)			Secretary under the direction of Campaign Coordinator
6. Duplicate Forms			Secretary
7. Order additional materials from the Southeast Conference (if needed).			Campaign Coordinator or Secretary
ACTIVE CAMPAIGN FIRST WEEK			
1. Campaign Steering Committee Meets: a. Campaign Plan and calendar adopted b. Type of Launching Event decided			Pastor Campaign Coordinator
2. Send "Alerting Letter" to Congregation			Campaign Coordinator / Secretary
3. Visit Pastor and Campaign Coordinator for Pledge			Pastor Campaign Coordinator
4. Enlist Congregational Chairs			Campaign Steering Committee
5. Promotion Committee Meets			Promotion Chair
6. Prospect Review Committee Meets			Prospect Review Chair and Campaign Coordinator
SECOND WEEK			
1. Complete Prospect Review			Prospect Review Chair and Campaign Coordinator
2. Prepare Master Lists			Secretary
3. Prepare Pledge Cards			Secretary / Campaign Coordinator

ACTIVE CAMPAIGN SECOND WEEK (continued)	✓ CHECK WHEN COMPLETED	TARGET DATE FOR COMPLETION	RESPONSIBILITY
4. Organization Meeting for Congregational Chairs			Campaign Coordinator
5. Visit Congregational Chairs for Pledge			Campaign Coordinator
6. Begin Enlistment of Team Members			Congregational Chairs
7. Complete all plans for Launching Event			Campaign Coordinator Congregational Chairs Promotion Chair
8. Send Invitation Letter to Launching Event			Promotion Chair
THIRD WEEK			
1. Campaign Steering Committee Meets			Pastor Campaign Coordinator Congregational Chairs
2. Use First Bulletin Insert			Promotion Chair and Campaign Coordinator
3. Lay Leader speaks during Sunday Service			Promotion Chair and Campaign Coordinator
4. **DEADLINE**: Enlistment of Team Members			Congregational Chairs
5. Visit Team Members for Gifts			Congregational Chairs
6. Assignment Meeting			Campaign Coordinator Congregational Chairs
7. Prepare Volunteer Packets (Include Pre-assigned prospects)			Secretary / Campaign Coordinator
FOURTH WEEK			
1. Use Second Bulletin Insert			Promotion Chair
2. Lay Leader speaks during Sunday Service			Promotion Chair
3. **DEADLINE**: Training Meeting Packets			
FIFTH WEEK			
1. Campaign Steering Committee Meets			Pastor Campaign Coordinator Congregational Chairs
2. Launching Event			Pastor Congregational Chairs Promotion Chair

ACTIVE CAMPAIGN FIFTH WEEK (continued)	✓ CHECK WHEN COMPLETED	TARGET DATE FOR COMPLETION	RESPONSIBILITY
3. First General Report (All volunteer pledges due)			Campaign Coordinator Congregational Chairs
4. Final Bulletin Insert			Promotion Chair and Campaign Coordinator
5. Team Member Kick-Off Training Meeting			Pastor Campaign Coordinator Congregational Chairs
6. Conduct Make-up Training Meeting			Campaign Coordinator Congregational Chairs
SIXTH WEEK			
1. Announce Progress to Date (No Dollar Totals)			Campaign Coordinator Congregational Chairs
2. Second General Report			Campaign Coordinator Congregational Chairs
3. Third General Report			Campaign Coordinator Congregational Chairs
4. Final General Report			Campaign Coordinator Congregational Chairs
SEVENTH WEEK			
1. Campaign Steering Committee Meets			Pastor Campaign Coordinator Congregational Chairs
2. Victory Announcement			Congregational Chairs
3. Follow-up loose ends			Campaign Coordinator
4. Close out Campaign			Campaign Coordinator

X. THE COLLECTION SYSTEM (Manual)

A. Special Significance

A fund-raising Campaign does not end with the final report meeting. Its true success is achieved through an effective collection procedure which produces maximum results. The system recommended here is time tested. It works. It has served thousands of institutions, helping them to collect an unusually high percentage of Campaign pledges.

B. Personnel and Supervision

No system will produce maximum results without the careful attention of competent staff personnel and regularly scheduled review and supervision.

The Collection Committee should consist of a minimum of the Church Treasurer, a member of the Campaign Steering Committee, and a member of the Board/Council's Stewardship Committee. A person should be appointed to Chair the Committee.

The Committee should meet monthly at definite pre-arranged times and "on-call" from the Chair to:

1. Review the status of collection.
2. Review and take action of any problem accounts.
3. Implement procedures for collection of problem and/or "in arrears" accounts.

Plan to make phone calls or personal visits on "in arrears accounts," those who fall behind by more than sixty days. After the donor's statement has been sent, wait ten days to see if nonpayers have responded. If not, make a call on the family or individual to see if some adjustment in the terms of the pledge is necessary. Perhaps a different schedule of payments would help, or an extended pay period. Before any such calls are made, however, the committee should check with the Pastor to see what advice he or she has to offer on the best approach to the particular families or individuals. Letters should not be used. In the event of financial reverses for a contributor, the Chair should be empowered to waive some or all of the unpaid pledge.

C. Mechanics and Record Keeping

Remember, you have two options--if you are computerized, CMS Management Software is available at an additional cost - please call the Campaign Office at (262) 245-2680. This software can also be utilized on an annual basis to conduct your own stewardship program or capital Campaign. It is fully integrated to work with many word processing programs; or manually by following the points listed below.

The pledge cards are designed so that the back may serve as a permanent record of payments. The amount of the pledge, date and terms of payment and balance due should be posted at the top of the card.

1. All pledge cards with a balance due should be filed in a monthly "TICKLER FILE" under the next due date.

2. Pledge cards on which payment has been made in full should be filed in a separate alphabetical "PAID IN FULL" file.

3. In case of a one-time gift, the committee should consider placing a plain white card with complete information (name, address, campaign volunteer, amount and date of gift) in a "TICKLER FILE" for a recontact to this member on the anniversary date of the gift.

4. Pledge cards of those members who asked to be recontacted at a later date should also be filed in the "TICKLER FILE" for future contact. Unless they are converted into donors, they should be marked “REFUSED” and put in the Refused File.

5. Pledge cards of those members who chose not to participate (Refused) should be kept separate for review and recontacted by the committee.

6. Periodic statements (monthly or at least quarterly) should be sent to all who have pledged or you may wish to incorporate the Southeast Conference UCC Campaign into your regular Sunday offering envelope.

7. As payments are received, they should be posted on the back of the pledge card. The card should be re-filed as to the next due date.

8. When the pledge is paid-in-full, the pledge card in the "TICKLER FILE" can be transferred to the "PAID IN FULL" file. You may wish to send a thank you letter to donors upon completion of their pledge payment. By the end of the payment period, the "TICKLER FILE" will be closed out, except for those who have defaulted on their payments. The "PAID IN FULL" file will represent an alphabetically arranged file.

D. Follow-Up Information Program

Arrange for reports in church newsletters, Sunday bulletins, bulletin boards, church website or included in the Pastor's announcements on Sunday morning, from time to time which tells how the total effort is progressing.

Reports will help keep interest high, and remind donors of the effect their gift is making on the church's mission efforts.

E. Remittance of Funds

When your church makes its commitment to the Southeast Conference UCC Campaign in accordance with a decision of the Board/Council, it will probably be payable over a period of five to seven years. Please consult the Pledge/ Payment Methods Chart on the following page for remitting funds.

Mail payments to:

Southeast Conference UCC
Campaign Office
1330 West Peachtree Street, NW
Suite 350
Atlanta, GA 30309

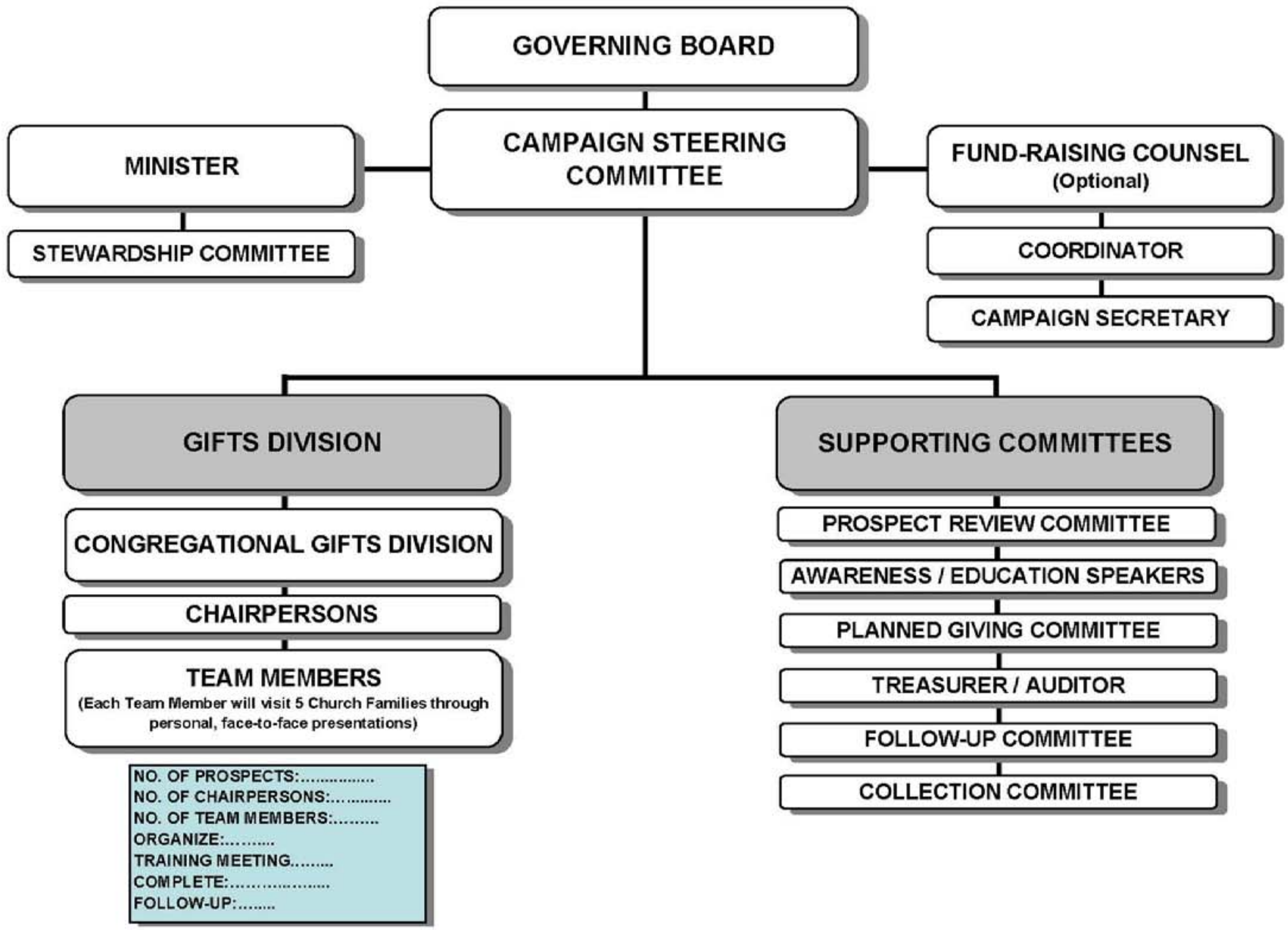
CHURCH PLEDGE / PAYMENT METHODS

11/11/09

PARTICIPATION METHODS (In Recommended Order)	PAYMENT METHODS	PLEDGE CARDS
COMBINED CAMPAIGN (Local Church & Conference)	-Conduct every member campaign. -Establish Separate Campaign Bank Account (do not co-mingle operating & campaign funds). -Create Line Item on Offering Envelopes for Campaign to distinguish between campaign & stewardship giving. -Donor will write one check made payable to the Church (Write church campaign name in the memo line on the check). -It is recommended that the church write one check to the SE Conference UCC monthly or at least quarterly. -Reminder Notices will be mailed by the Conference to the church based upon the payment terms indicated on the Declaration of Commitment Form.	Church will create one pledge card (do not itemize both campaigns - should be one campaign).
CONFERENCE CAMPAIGN	-Conduct every member campaign. Church to decide method of remittance: **Option 1: (Recommended) The church is responsible for collecting payments and remitting to the Conference**. -Establish Separate Campaign Bank Account (do not co-mingle operating & campaign funds). -Create Line Item on Offering Envelopes for Campaign to distinguish between campaign & stewardship giving. -Donor will write one check made payable to the Church (Write SE Conference UCC campaign in the memo line on the check). -It is recommended that the church write one check to the SE Conference UCC monthly or at least quarterly. -Reminder Notices will be mailed by the Conference to the church based upon the payment terms indicated on the Declaration of Commitment Form. **Option 2: The church is NOT responsible for collecting payments.** -The church will turn over all of the signed pledge cards to the SE Conference UCC and the Conference will handle the payment collection by sending Reminder Notices directly to the donors.	Pledge cards are available from the Conference. Please call 1-800-903-1535 to order.
CONFERENCE CAMPAIGN & BUDGET ITEM	-Conduct every member campaign. Church to decide method of remittance: **Option 1: (Recommended) The church is responsible for collecting payments and remitting funds to the Conference**. -Establish Separate Campaign Bank Account (do not co-mingle operating & campaign funds). -Create Line Item on Offering Envelopes for Campaign to distinguish between campaign & stewardship giving. -Donor will write one check made payable to the Church (Write SE Conference UCC campaign in the memo line on the check). -It is recommended that the church write one check to the SE Conference UCC monthly or at least quarterly which also includes the budgeted amount. -Reminder Notices will be mailed by the Conference to the church based upon the payment terms indicated on the Declaration of Commitment Form. **Option 2: The church is NOT responsible for collecting payments.** -The church will turn over all of the signed pledge cards to the SE Conference UCC and the Conference will handle the payment collection by sending Reminder Notices directly to the donors. -It is recommended that the church write one check to the SE Conference UCC monthly or at least quarterly for the budgeted amount. -Reminder Notices will be mailed by the Conference to the church based upon the payment terms indicated on the Declaration of Commitment Form just for the budgeted amount.	Pledge cards are available from the Conference. Please call 1-800-903-1535 to order.
BUDGET ITEM	-Conduct Awareness / Education meetings to inform the congregation about the conference campaign. -It is recommended that the church write one check to the SE Conference UCC monthly or at least quarterly for the budgeted amount. -Reminder Notices will be mailed by the Conference to the church based upon the payment terms indicated on the Declaration of Commitment Form.	Not applicable
OTHER PLAN	Please consult with the Campaign Office to determine the best form of payment.	?

NOTE: All payments should be made payable to: Southeast Conference UCC Campaign and mailed to:
Southeast Conference UCC, Campaign Office, 1330 West Peachtree Street, NW, Suite 350, Atlanta, GA 30309.

LOCAL CHURCH CAMPAIGN ORGANIZATION CHART



SAMPLE LETTER

CONGREGATIONAL "ALERTING" LETTER

A letter similar to the following should be sent to members of the congregation by either the Pastor or the Congregational Chairs. Remember, that some members of the congregation (in spite of all the publicity) may not have heard of the Campaign or its purpose. This letter is proposed as an "alert" to the membership. Distribution in the early days of the Campaign is recommended.

(ON LOCAL CHURCH LETTERHEAD)

Dear Member:

Our congregation will soon be participating in the Southeast Conference UCC Campaign. Over a five year pledge period the Fund will challenge the whole church to contribute to the needs of the Conference.

The Southeast Conference UCC Campaign provides an exciting opportunity to expand the work of the United Church of Christ here in the Southeast. The $1,400,000 - $3,800,000 goals will be used for:

1. **Building Covenant and Connection across the Conference to encourage and support one another and to provide resources that will enable our churches to more effectively provide witness to our communities.**

2. **Building Leadership for the local church and the emerging Southeast Conference UCC.**

3. **Building Congregations.**

By official action of our (joint boards, trustees, congregation)*, we are about to launch our Campaign for $__________, which we have determined is our share of the $1,400,000 - $3,800,000 goals adopted by the Conference.

Our plans here at ___________ Church are about completed. In the weeks just ahead you will learn more about this project and the opportunity for you to participate in it.

Sincerely yours,

*Name of appropriate governing body.

SAMPLE LETTER

INVITATION TO THE LAUNCHING EVENT

(ON LOCAL CHURCH LETTERHEAD)

Dear Mr. and Mrs. Jones:

You are cordially invited to a special Southeast Conference UCC Campaign (dinner, lunch or other launching event) of __________ Church, to be held (place, date, time). At this dinner (or event), the needs and plans of the Southeast Conference Campaign will be discussed. I know that you, as dedicated and interested members of our congregation, will want to be with us.

Please use the enclosed return card to signify acceptance.

Sincerely yours,

Congregational Chairs

SAMPLE RETURN CARD - RETURN ADDRESSED AND STAMPED

Dear Mr./Mrs.______________________________:

This will acknowledge your invitation to the
Southeast Conference UCC Campaign
dinner (or launching event).

❏ You can count on us. Number attending _______.

❏ Sorry, we cannot be present.

Signed_____________________________

____

PLEDGE ACKNOWLEDGMENT

(On Local Church Letterhead)

Dear _____,

On behalf of (name of church) and the Southeast Conference UCC, thank you very much for your generous commitment to the (name of campaign). *"Give and it will be given to you. A good measure, pressed down, shaken together, running over, will be put into your lap; for the measure you give will be the measure you get back."* Luke 6:38

The total amount of your commitment is $________. The terms of payment you indicated are as follows: $___________ (frequency) for 5 years beginning (date). You have remitted to date the amount of $__________. Your pledge balance is $__________. If this information does not agree with your records, please contact (name & telephone number).

Please make checks payable to: (name of church) in order to deposit your payment to the correct account. Please earmark (name of campaign) in the memo portion of your check.

Your commitment, together with a host of others' will strengthen our church now and in the years to come. Please accept our gratitude for your generous support.

Sincerely,

(Treasurer, Congregational Chairs or Pastor)

SAMPLE AGENDA 1

ORGANIZATIONAL MEETING

■OPENING PRAYER

■PURPOSE OF CAMPAIGN

Brief review of background and needs to be met

■DISCUSSION OF CAMPAIGN PLANS

Our Local Challenge in the Southeast Conference UCC Campaign (include goal)

Organization (what is required for the task ahead)

Soliciting Division

Supporting Committees

Launching Event

Calendar of Activities

■DATE OF NEXT MEETING

■CLOSING PRAYER

SAMPLE AGENDA 2

LAUNCHING EVENT

- OPENING PRAYER

- DINNER (LUNCHEON)

- INTRODUCTIONS / PURPOSE OF MEETING

- THE SOUTHEAST CONFERENCE UCC CAMPAIGN

- OUR RESPONSIBILITY AS MEMBERS OF THE SOUTHEAST CONFERENCE

- KINDS OF GIFTS NEEDED TO REACH GOAL

- DISCUSSION

- CLOSING PRAYER

SAMPLE AGENDA 3

VOLUNTEER KICK-OFF TRAINING MEETING

■OPENING PRAYER

■APPRECIATION TO VOLUNTEERS

■THE SOUTHEAST CONFERENCE UCC CAMPAIGN

Campaign Needs and Plans

Local church goal

Organization

Timetable

■IT'S HOW YOU ASK THAT COUNTS

■EXPLANATION OF MATERIALS

■QUESTIONS AND ANSWERS

■CLOSING PRAYER

ENLISTMENT REPORT

The following persons have been enlisted to serve as ____
(CONGREGATIONAL CHAIRS OR TEAM MEMBERS)

in the _Congregational Gifts Division____

PLEASE PRINT OR TYPE

NAME / HOME ADDRESS / CITY, STATE, ZIP	BUSINESS ADDRESS CITY, STATE, ZIP	TELEPHONE NUMBER(S)
1.		Home: Business:
2.		Home: Business:
3.		Home: Business
4.		Home: Business:
5.		Home: Business:

Do not delay filing this report with the Campaign Office until enlistment is completed. Two or three names may be filed at a time and additional forms used for further enlistments.

(Please Check)

❑ This completes my list

❑ More to come

Number of persons still to be enlisted _____.

Date:______________________________

Signed:____________________________

Business Address:____________________

Business Telephone:__________________

Residence Address:___________________

Telephone:_________________________

(Please check address preference for mailing)

VOLUNTEER ASSIGNMENT FORM

VOLUNTEER:

REPORTING TO:

DIVISION:

PROSPECT AND ADDRESS	EVALUATION	PLEDGE	WORKER / COMMENTS

PROSPECT SELECTION FORM

(Name of Team Member) (Phone Number)

(Name of Chair Team Member is Report To)

PLEASE FILL IN THIS FORM AND HAND IT TO ONE OF THE CAMPAIGN COORDINATOR AFTER THE MEETING.

ASSIGN THE FOLLOWING PROSPECTS:	EVALUATION	PLEDGE
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		
16.		
17.		
18.		
19.		
20.		

SAMPLE PLEDGE CARD

These pledge cards are available at no charge from the
Southeast Conference Campaign Office. Please call (800) 903-1535 to order.

FRONT SIDE

Name: ______________________________

Address: ______________________________

____

City: ______________ State: ______________

Zip Code: ______________________________

SOUTHEAST CONFERENCE UNITED CHURCH OF CHRIST
1330 West Peachtree Street NW • Suite 350 • Atlanta, Georgia 30309

In support of the Southeast Conference of the United Church of Christ Campaign, I/We subscribe the total sum of $ ____________ to be paid over ________ Years

beginning Month: __________ Day: __________ Year: ________

Payment Terms: ❒ Annually ❒ Semi-Annually ❒ Quarterly ❒ Other ____________ **❒ Auto Withdraw**

Memorial: ❒ Yes ❒ No In Honor of: ______________________

Email address: ______________________

NOTE: This commitment can be changed at any time by notifying the Church Office.

SIGNED: ______________________ DATE: __________

NOTE: Please enter in check memo line: ***"Transforming Churches-Transforming Lives"*** *Campaign*

Transforming Churches • Transforming Lives
SOUTHEAST CONFERENCE
UNITED CHURCH OF CHRIST

For Office Use Only

TOTAL GIFT:	$
PAID HEREWITH:	$
BALANCE:	$

BACK SIDE

PLEDGE AMOUNT		DATE		TERMS			
DUE DATE	DATE PAID	AMOUNT	BALANCE	DUE DATE	DATE PAID	AMOUNT	BALANCE

SOUTHEAST CONFERENCE UCC CAMPAIGN

IT'S HOW YOU ASK THAT COUNTS

BE INFORMED ABOUT THE CAMPAIGN

1. Become familiar with the Southeast Conference UCC Campaign by studying the materials.
2. Be "sold" yourself on the Campaign before you try to sell others. Make your own pledge first.

PLAN YOUR APPROACH

1. Know your prospect. Try to learn as much as possible about the families you'll be visiting.
2. Tailor your visit.
   - Remembering that no one supports a cause he/she does not understand. Ask yourself, "What should I emphasize to this person?"
   - Regarding his/her participation
     - Would tax information be of interest?
     - Or the giving of securities?
   - Remembering that this is a 5 year commitment. Strive for a pledge, not a cash-out-of-pocket "donation".
3. Have a definite "suggested asking" figure in mind for each prospect (found on the Volunteer Assignment Form).
4. Plan to make two visits with each prospect.
5. If necessary, take someone with you.
6. See your best prospects first - success is contagious.

ON THE FIRST VISIT

1. Present the cause...but not the pledge card. Make it a visit for information, cultivation and challenge.
2. Be sure your prospect learns what his/her "suggested asking" figure is.
3. Answer questions.
4. Make an appointment for a second visit before you leave, so that your prospect can "think and pray over it."

ON THE SECOND VISIT

1. Re-emphasize what seemed to interest your prospect on the first visit.
2. Encourage a commitment and then present the pledge card.
3. If asked, help to complete the details on the card and have the card signed.
4. NEVER, NEVER leave the pledge card with your prospect!
5. Have the prospect put the pledge card in the security envelope.

IMPORTANT POINTS FOR SUCCESSFUL VISITS

1. Study all the publicity materials.
2. Make your own commitment **before** your first visit.
3. Begin making your visits immediately.
4. See only the people whose pledge cards you have been assigned.
5. Be patient and tactful with each prospect.
6. Report on all pledge cards promptly.
7. Be proud to represent the Southeast Conference. Do not apologize for making the visit. Be proud to be a member of a church that believes in meeting the mission and evangelism challenges of our church.
8. Do not allow yourself to be drawn into any argument.
9. Do not delay your first visit.
10. Do not telephone your prospect (except to make an appointment for a visit).
11. Do not fail to report promptly.
12. Do not leave the pledge card with your prospect.

HANDLING OBJECTIONS

You can expect at least some of the churches you solicit to object to the idea of pledging. Objections are a natural part of the campaigning process, so they should be regarded as welcome signals that you are doing your job the way it should be done. However, unless you really understand what objections are and how to handle them, they can present big problems. Therefore, the purpose of the following information is to give you insight into the psychology of objection, and a simple system of handling them.

Keep the following points in mind:

OBJECTIONS AREN'T PERSONAL!
An objection is never directed against you, it is directed at the idea you are presenting.

OBJECTIONS PROBABLY AREN'T REAL!
Most objections are "stalls" rather than sincere objections. You have to probe pretty deep to uncover the real thing.

BE SYMPATHETIC!
Listen carefully to what your prospect says, and sympathize with them. **Don't agree with them, however.** You can be sympathetic and concerned without necessarily agreeing with them.

YOU HANDLE OBJECTIONS!
The operative word is handle, not answer. You can't answer an objection because it is almost more imagined than real. Obviously you can't logically answer an imaginary argument; **you must handle it, deflect it.**

DON'T ARGUE!
If you argue with an objection, you will force your prospect into defending it, which they will resent. Remember the old adage about winning the battle but losing the war? As a solicitor, you may win an argument but you will lose your sale.

ENCOURAGE THEM TO TALK!
When they voice an objection, let them expand on it at length. If the objection is insincere, illogical, or both, it will tend to fall on its own weight as it is articulated.

ABOVE ALL, RELAX AND BE YOURSELF!
You shouldn't feel that your job is to match wits or verbally "fence" with your prospect. Neither is it necessary to overwhelm your prospect with rhetoric. You have an important idea to present, and you should be absolutely relaxed and be yourself.