

*How To*

# OPTIMIZE

YOUR ANNUAL DIOCESAN APPEAL





Hey! This is Fr. Peter from St. Patrick Parish. As you know, I've been preaching for a number of weeks about the importance of supporting the diocesan appeal. Well, the appeal kicks off this weekend, and we need YOU to help us gain some traction on our parish goal. You in?

## HOW TO OPTIMIZE YOUR ANNUAL DIOCESAN APPEAL

It may feel as though there has never been a greater opportunity to give to those in need than there is today. According to the National Center for Charitable Statistics (NCCS), more than 1.5 million nonprofit organizations are registered in the U.S. This number includes public charities, private foundations, and other types of nonprofit organizations. What does this mean for the Catholic Church and, more specifically, annual diocesan appeals? That they've got a lot of competition when it comes to recruiting supporters and reaching their fundraising goals.

Have you heard of the Pareto principle? Also known as the 80/20 rule, it states that for many events, roughly 80% of the effects come from 20% of the causes. That same principle can also be used to illustrate church giving. This means that only a fraction of those sitting in the pews actually make the commitment to support parish and diocesan appeal-funded ministries. The question then becomes, why? Why don't more people give to an appeal that benefits all of us, from the least to the greatest? Why do they not give to ministries that support Catholic school students, priestly formation, young adult programs, or even their own parish?

Unfortunately, there isn't a perfect answer to these questions. However, there is a lot that dioceses can do to customize and change their messaging and method of delivery to increase donor giving, by using parishioner data trends from — where else? — the parishes themselves. Read on for why data collection is so vital for successful diocesan appeals, what data is most useful to analyze, and how to effectively utilize it.

### FINDING A CONNECTION IS KEY

A great way to capture the attention of your diocese and encourage donations is to form the appeal not as a request for money, but as a story where they are the hero. In order to help them form a connection to people and places that they may never meet or experience, it's essential to capture their compassion. The best person to do this is by utilizing someone they're already familiar with and trust — the pastor.

It's a proven fact that the parishes that do well in fulfilling their diocesan goal are the ones in which the pastors support it fully. They don't take the box of posters and flyers and stick it in the back of church. Rather, they carefully plan their homilies to reflect the stewardship message and encourage their members to "prayerfully consider supporting the appeal."

This is great and encourages growth for the main goal. But these days, members also need to be reminded that they are vital in reaching the goal.

Pastors need to be able to connect what appears to be a far-off, “doesn’t affect me” kind of appeal, and share exactly how it benefits their local Catholic community. Financial assistance for young men studying for the priesthood, community assistance for charities throughout the diocese, scholarships for low-income students attending local Catholic schools, spiritual gatherings for young adult formation ... each parish has, in one way or another, a connection to their diocesan appeal. And it’s the job of the pastor and parish leadership to show parishioners what that connection is.

Are there some churches that receive funding from the diocesan appeal for their parish pantry or senior care services? Did a parish recently receive a grant from the diocese for faith formation? Is there a parish family whose son is discerning priesthood at the seminary, or whose daughter is considering becoming a religious order sister? Does the parish have a Catholic school that receives scholarship funding for low-income students? If a parish can answer yes to any of these, then they have a connection to the diocesan appeal. The next step is finding the best way to show that connection to them, and the key to that is in the data.

## THE IMPORTANCE OF DATA — AND HOW TO UTILIZE IT

Contrary to popular belief, data isn’t just a collection of numbers. Rather, the goal of collecting data is simply to gain a deeper understanding of how things are and whether your efforts are as effective as possible. When it comes to delivering the message of a diocesan appeal to thousands of people — especially with the cost of direct mail such as bishop letters, appeal brochures, and reminder postcards — administrative costs must be as targeted as possible. Each cost incurred takes away from the overall amount collected. To be good stewards of what is given by parishioners, each dollar needs to be utilized as best as possible — and this can be done by knowing who your audience is.

When it comes to working with parishes, data gathering is a 50/50 partnership. The data they have at their disposal is invaluable to a diocese. Think parishioner contacts, sacramental numbers, age/

location demographics, talent assessments, and more. With this kind of information, dioceses can tailor their messaging to specific groups, whether that be high-end donors, families, or even just young adults who give what they can.

The best way to get the most up-to-date and accurate information from parishes is to have a central database in which to input and access in real time. If each parish has a church management system such as WeGather, they can maintain their own member contacts on a regular basis and enter their latest sacramental records. The collection of this specific data is then accessible to the diocese, which can be used in an appeal that is, in turn, designed to help those exact parishes.

Direct mail is a huge part of diocesan annual appeals. However, it is also one of the most costly as the price of postage tends to rise each year. The goal is to then have as much accurate contact information as possible, so that the return on investment is comparable to what it cost to send. If a diocese has a parish-wide church management system, then there is no need to request mailing lists from parishes (which, of course, comes in all kinds of formats) or to follow up with parishes that miss the deadline.

Along with data collection is that of communication preferences. Although direct mailing is the preferred send for dioceses, more and more people are choosing to stop that option and instead go for email or text messaging. With the added information of who wants what communication when, a diocese can then cut down on the amount they spend on direct mail, and send their message using a more preferred method.

While collecting data appears to benefit only the diocese, there are many ways that it benefits the parish. For all direct mail that is sent from the diocese to registered Catholics, any returned mailings will be sent back to the diocese. Imagine — instead of the diocese making the change in their list, and then informing the parish of the change for their own records, a central database cutting that task in half.

The diocese can process returns by updating the contact information, which is then accessed by the parish and used for their vital communications. The same can be done for any email campaigns.



Emails that bounce back to the sender (in this case, the diocese) can be corrected, removed, or updated by the parish.

## CUSTOMIZING YOUR MESSAGE VEHICLE

An appeal is an intricate process. What might work for one diocese, parish, or person may not work for the other. That is why going back to your collected data and analyzing it is key to correctly using it.

Many people in the diocese will receive the appeal letter from the bishop and freely give what they can. Perhaps they have a special connection to him or understand first-hand how vital funding the appeal is. But for a good majority of others, that letter will not sway them to give. They need a different nudge from someone they know or are more familiar with. And that person usually is the pastor of their home parish. He is the one who can actively reach out to them and supply them with the reasons why it's essential to support diocesan-wide appeals.

You can also try to have actual people who have benefited from the appeal speak out to a congregation, such as a couple who contacted the local Catholic Charities for adoption services, or a family who regularly works in a parish food bank and sees every day the difference it makes in peoples' lives. Or what about some college students who regularly take part in young adult gatherings? Or an engaged couple who is going through marriage preparation? All of these people are stakeholders and can attest to the importance of the appeal.

Finally, in an effort to get people the message, you need to find the best way to reach them. In addition to speaking about the appeal during Mass, stuffing the bulletin with an insert, and putting up a poster or two in the main gathering space, dioceses can encourage parishes to find a way to connect to people outside of their walls. In addition to a direct mailing, think email campaigns, text messages, social media posts, and interestingly enough, phone calls.

Many dioceses have gone back to the basics and started putting together a phone bank to reach parishioners who have not sent in a donation or pledged an amount — and the results say it's worth it.



Think about it — when was the last time you picked up the phone to speak to someone from your diocese? An out-of-the-blue phone call from a familiar voice such as the bishop, pastor, deacon, parish secretary, or even a long-time parishioner or two can do wonders for connecting with members.

But what about the younger generation who, according to their profile preferences, do not wish to be contacted by phone? Good news — there's a work-around for that! Chances are, they are fine with receiving a simple text message — and that's the perfect vehicle to use when it comes to soliciting donations from them. Seen especially in the recent political sphere, bulk SMS apps and texting platforms like Hustle are becoming mainstream. Dioceses and parishes alike can definitely utilize that same tool using their own messaging.

There are so many ways to implement your diocesan appeal, but none of that matters if you don't have the data to customize your messaging. By studying essential data that has been dutifully collected by those who come in contact with potential supporters every day, there's nowhere for the giving thermostat to go but up.

*Ready to start leveraging your data? Visit [WeGather.com](http://WeGather.com) or call 877.316.0260.*