



# Volunteer Guide

DRAFT as of July 20, 2021

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# INTRODUCTION

For the past 175+ years, the parishes that are the heart and soul of the Archdiocese of Milwaukee have been blessed with the opportunity to transform lives in the name of and for the sake of Christ. Today, we can honor those who came before us and grow our Church for future generations.

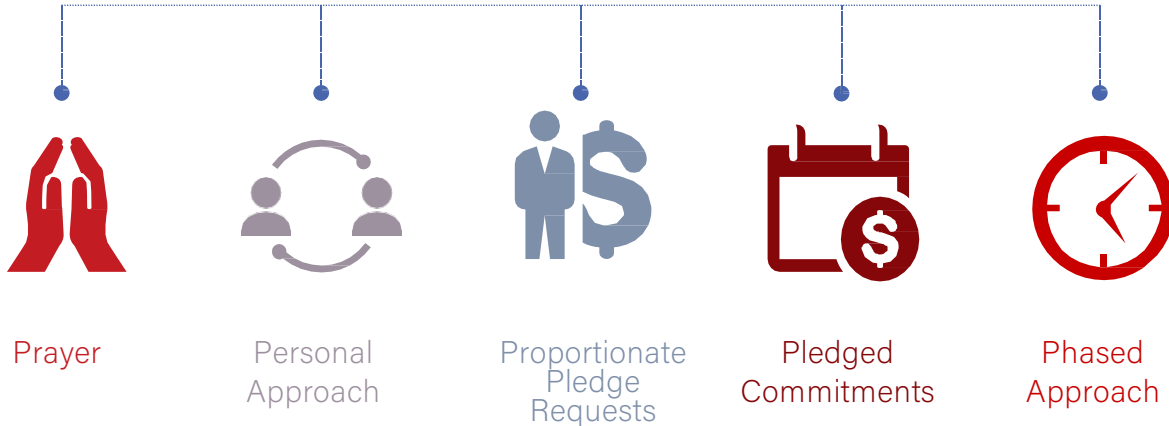
Love One Another is a \$150M campaign that will improve the lives, ministries, and missions that affect the southeastern Wisconsin communities. The campaign will allow us to:

1. Enhance parishes through meeting local needs
2. Serve the most vulnerable among us
3. Bolster Catholic education systems
4. Provide continuing learning for our clergy and lay ministers
5. Continue to prepare for future vitality of the Church

The information found within this guide will prepare campaign volunteers for personal visits with fellow parishioners and community members. Love One Another is an ambitious and achievable effort for all our parishes and will require the support of all our parishioners. During this campaign, every family will be invited to consider making their best pledge to the campaign. Your proactive involvement will be necessary in order to achieve the best possible results. This guide will focus on strategies and techniques that best apply to face-to-face visits, either via Zoom or in person.

# FIVE CAMPAIGN PRINCIPLES

Five key principles will drive the campaign for your parish.



## PRAYER

Prayer is a vital component of this campaign and is a key to overall success, including each parishioner's prayerful consideration of their pledge.

## PERSONAL APPROACH

The most effective method to raise funds in a campaign is through personal, face-to-face requests. When you can fully explain the needs, encourage questions, and invite the family to join the campaign in a very personal way, parishioners will be more likely to participate with their best pledged effort.

## PROPORTIONATE PLEDGE REQUESTS

Parishioners may find themselves in different situations both in the blessings they have received and in their commitment to their parish. One of our campaign's guiding principles is making one's best effort. Specific and targeted pledge requests will be made to each family throughout the campaign.

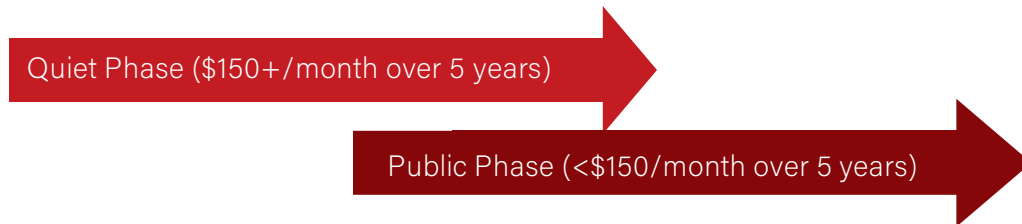
## PLEGGED COMMITMENTS

To encourage long-term commitments to the campaign, pledges are payable five years. The campaign emphasizes pledging because it allows all families the opportunity to consider larger commitments than through a one-time gift.

## PHASED APPROACH

The phased approach seeks to raise a significant amount of funds as quickly as possible, while giving everyone an opportunity to make their best pledge. This begins with the Quiet Phase, raises sights in the Public Phase, builds significant enthusiasm, and generates the momentum needed to reach our ambitious campaign goal.

### PLEDGE REQUESTS BY PHASE



## YOUR ROLE

As a campaign volunteer, you play an essential role in the success of this historic effort. We rely on your leadership to connect with our parishioners and to advocate for the campaign. Your conversations and interactions with parishioners will directly influence their decisions to participate. If the campaign is important to you, it will be important to others.

You will be asked to:

- Pray for God's blessings on the campaign and our work
- Make the best pledge that you can
- Invite fellow parishioners make their best pledge and volunteer (if appropriate)
- Attend and participate in bi-weekly campaign meetings

Please keep the following in mind as you prepare to make visits:

<p>Our people will pledge generously</p>	<ul style="list-style-type: none"> <li>• The people of your parish are generous by nature.</li> <li>• We need to share with fellow parishioners the important needs of our Church and ask for their support.</li> </ul>
<p>Parishioners want to know about the campaign</p>	<ul style="list-style-type: none"> <li>• Those who know about the campaign are curious and eager to support our Church, as evidenced by the results of preparation done for the campaign.</li> <li>• People want the Church to strengthen and expand its mission.</li> <li>• People must understand why the current growth needs must be met with growing support and investment in today and the future.</li> </ul>
<p>Families pledge in relation to who asks them</p>	<ul style="list-style-type: none"> <li>• People will listen and respond to a fellow parishioner.</li> <li>• Your own participation will inspire confidence in the campaign and encourage pledging.</li> </ul>
<p>Families are impacted by how they are asked</p>	<ul style="list-style-type: none"> <li>• Our approach to engaging families should be sincere and positive.</li> <li>• The visit is an opportunity to strengthen our faith community.</li> <li>• Make it personal, genuine, and share your passion. Simply share your experience and why you have chosen to support the campaign.</li> </ul>
<p>Families will make their own decisions</p>	<ul style="list-style-type: none"> <li>• After you've requested their pledge, allow them to respond.</li> <li>• The pledge request has been tailored to the family based on the goals of the campaign, and their previous support to the parish.</li> </ul>
<p>Families view philanthropic support as an investment</p>	<ul style="list-style-type: none"> <li>• Parishioners view their pledges as investments in the future of the parish.</li> <li>• It is important to emphasize how the campaign will help future generations of Catholics</li> </ul>

# CONDUCTING SUCCESSFUL VISITS

Successful visits are made up of four essential components:



The following pages serve as a guide for completing each stage of a request visit. Please contact your Parish Campaign Director, if you have any questions.

## PREPARATION

### MAKE YOUR OWN PLEDGE FIRST

- All campaign leaders and volunteers are asked to make their own best pledge before visiting others. Once you have made your pledge, you will feel confident and sincere asking someone for their own best pledge.
- Your pledge will have a direct influence on the success you have visiting with other parishioners.
- By making your own pledge first, you help to build early momentum for the campaign.

### PRAY AND REFLECT OF THE IMPORTANCE OF YOUR PARISH IN YOUR LIFE

- Believe that this campaign matters for the future of the Church and recognize the impact of your support.
- Consider the positive impact of the campaign on the future of your parish.
- Remember, you are inviting others to pledge on behalf of the parish and important Catholic ministries impacting all parishioners in southeastern Wisconsin.

### IN YOUR OWN WORDS, WHY DID YOU MAKE YOUR BEST PLEDGE TO THE CAMPAIGN?

### KNOW THE CAMPAIGN NEEDS, GOALS, AND OTHER FACTS

- Familiarize yourself with the folder content, local needs, pledge request letter, FAQ document, and other helpful materials.
- Refer to the Volunteer summary placemat often. Use this guide for detailed assistance.
- Understand and know the plans and needs of the Church. Prepare answers to common questions about the campaign. If there are any questions you cannot answer, please do not hesitate to contact your Parish Campaign Director.
- Note in-person training & assignment and bi-weekly meetings at the parish provide opportunities to build confidence, ask clarifying questions, and troubleshoot on a regular basis.

### SELECT AND REVIEW YOUR ASSIGNMENTS

- Once you choose families to visit, begin with those you are most comfortable contacting.
- Visit families who are most likely to pledge as asked.



- Gather relevant information to help guide your conversation with the families you plan to visit (for example, if they have children in the school, what ministries they serve in, which Mass they attend, etc.).
- Keep your sights high. Think about what kinds of pledges the parish needs to receive, rather than what you think someone will pledge. The success of this campaign depends on asking families to prayerfully consider specific pledge amounts and respond to the best of their abilities.
- Remember we are asking for best possible pledges – proportionate to the gifts and blessings they have received from the Lord. A suggested pledge amount has been determined for each family based on their past generosity to the parish. People want to know what pledge amount they are being asked to consider.
- Allow families to decide for themselves. Once you have invited a family to consider a specific pledge, allow them to commit their own decision and take time to pray on it.

#### PREPARE YOUR SCHEDULE

- Know your own availability. Set time aside each week to make calls to schedule visits as soon as possible after you select several families to visit.
- Have three to four blocks of time marked on your calendar to meet with parishioners. Be ready to offer specific dates.
- Focus on scheduling each visit and avoid discussing the campaign in detail on the phone. Ask your assigned parishioners to hold any questions until your visit. You may consider saying, *that is a great question, and I look forward to discussing it further when we meet in person.*

#### INFORMATION AND MATERIALS FOR YOUR VISITS

- You will be supplied the contact information of your assigned parishioners that includes your parishioners' name, address, phone number, email, and suggested pledge.
- You will also receive prepared packets for each of your assigned families.
- Your packet will include:
  - o Campaign Folder: outlining of needs and impact of the campaign.

- Parish Needs Statement: a description of the specific parish needs to be funded.
- Pledge Request Letter: from your pastor/parish director.
- Pledge Form: for parishioners to document a pledge amount.
- FAQ: a reference sheet on frequently asked questions.

Each pledge request should take place in person., if possible

The setting for a visit to request a pledge is important. Visits should be scheduled in person at the parishioner's home, at the parish in a quiet, private location, or outdoors in the sanctuary/in someone's back yard, with both spouses present. Avoid meeting in busy places like a restaurant. Choose a location that is comfortable to you and the family. If desired, you may conduct some or all your visits virtually using Zoom or similar platforms. See your Parish Campaign Director for assistance.

#### AIM TO MEET IN:



- The parishioner's home
- Your home
- The parish—in a meeting room or office (please talk with your parish coordinator).
- Virtually

#### AVOID MEETING IN:



- Restaurants / coffee shops
- Offices (unless your own)
- Crowded rooms
- In the parking lot after service

Allow yourself enough time to present the needs and share your thoughts without hurrying. Give yourself about 30 minutes and try to stick to that time.

A family may ask you to mail the pledge form, telling you that they will send it back to the church. This approach often leads to lower pledges and more intensive follow-up.



All campaign materials should be personally delivered and discussed with each family. Please have a plan and date in mind for follow-up, if needed.

## SCHEDULING THE VISIT

### CONTACTING YOUR ASSIGNED FAMILIES

- Before calling the family, have two or three specific dates and times available for a visit.
- Introduce yourself and state the reason for the call. Mention you are calling on behalf of [PASTOR] regarding the Love One Another Campaign here at [PARISH].
- Emphasize that the visit should only take 30 or 40 minutes.
- If you are visiting a married couple, both spouses should be present to make an informed decision about making a pledge together.
- Thank the parishioners in advance for their time.
- Call, text, or email a day ahead of time to confirm the visit.

### SUGGESTED PHONE CALL SCRIPT

- *Hello, (parishioner's name). This is (your name). I am a fellow parishioner at [PARISH]. How are you today?*
- *[Person responds.]*
- *Great! I'm reaching out on behalf of [PASTOR] and following up on a letter that was recently mailed. [PASTOR] asked that I meet with you to talk about the Love One Another Campaign at [PARISH]. I would like to schedule a time to meet and discuss this initiative with you (and your spouse, if appropriate). Might you be available on [DATE] at [TIME]? Another option can be [TIME] if that works better for your schedule.*

POSSIBLE RESPONSES	SUGGESTED RESPONSE
<p>Yes, we will meet with you:</p>	<ul style="list-style-type: none"> <li>• Restate visit time/date and location to confirm.</li> <li>• Thank the family and state you are excited to meet them.</li> <li>• Record the time, date, and location of the meeting.</li> <li>• Check in with your Parish Campaign Director with results or questions.</li> </ul>
<p>We are not interested in a personal visit:</p>	<ul style="list-style-type: none"> <li>• You might say, <i>"Father/Parish Director would be appreciative if I could have a few minutes of your time to discuss our plans and the campaign."</i></li> <li>• If the parishioner attempts to lower any expectations of what they can contribute financially or insist that because they are not going to contribute and a meeting is unnecessary, remember your goal is to meet face-to-face. Because of the magnitude of this undertaking and what it means to [PARISH], a meeting is necessary to fully explain the campaign and need for best pledges.</li> <li>• If a parishioner expresses concerns/objections about the campaign: <ul style="list-style-type: none"> <li>○ Listen, acknowledge, and write down their concern.</li> <li>○ State that you will investigate their concern.</li> <li>○ Point out you would be happy to address their concern during the meeting. A visit allows you to fully explain the needs and answer questions.</li> </ul> </li> <li>• If they still will not meet, thank them for their time. Ask them to pray for the success of the campaign, and if their circumstances change and they would like to learn more about the campaign to call you or the parish office.</li> </ul>

Answering machine or voice mail:	<ul style="list-style-type: none"> <li>• Leave a positive, upbeat message and ask for a call back.</li> <li>• "Hello. This is (<i>your name</i>) a fellow parishioner at [PARISH]. [PASTOR] asked me to give you a call. Please call me at (<i>your number</i>). Thank you."</li> <li>• You may share that you will call back later in the week.</li> </ul>
The number is incorrect/disconnected:	<ul style="list-style-type: none"> <li>• Record the information and share with the parish secretary so that they can make changes to the roster. Connect with the parish office or other parishioners to see if they can locate current contact information.</li> </ul>

## CONDUCTING THE VISIT

### SETTING THE STAGE

Relax: A great conversationalist is a good listener. Start the visit with pleasant, neutral conversation to break the ice. The best way to start the conversation is to ask the family about their history and involvement with [PARISH] or some other small talk. This time should be used to learn more about the person(s) you are visiting, their experiences, and interests at [PARISH]. This allows you to begin to identify the needs in which they are most interested.

Begin with the campaign prayer. Prayer cards have been prepared and will be given to you at the parish meetings.

Show sincere enthusiasm: Families will respond positively to your excitement about the plans. When presenting the campaign to a parishioner, remember :

- The campaign folder should be used as a guide to your conversation. This will be helpful to introduce the purpose of your meeting and guide conversation around opportunities for the parish to address important needs.
- The conversation is an invitation to join you and other parish families. The pledge request should be presented as an invitation to a good friend..
- Share the vision, and the pledge will follow. The purpose of your visit is to share the vision of the future for our parish and local Church and invite their support.

## PRESENT THE NEEDS

- It is important your approach is *always* personal and positive.
- Your objective is to share your passion about the campaign's purpose and goals.
- Cover points of interest to the parishioner. Try to learn their interests early in the visit and focus on what is important to you and them.
- Do your best to answer any questions the family may have throughout the presentation and after you finish sharing information about the needs.

## MAKING THE PLEDGE REQUEST

- The actual visit, the setting, and the personalities involved will indicate the best moment to make the request. The intent of this section is to provide general information and proven recommendations, rather than establish hard-and-fast rules.
- After you have discussed the needs and reasons for the campaign, introduce the pledge request:



Introducing  
the Request

- *Jack and Mary, we have an extraordinary opportunity in front of us to impact our parish and Catholics throughout our 10 counties of southeastern Wisconsin. Our support will enable our parish to... (Ex. restore our church building interior and create a fund for the poor)*
- *Jack and Mary, we are grateful for your ongoing support of our parish.*
- *For our campaign to succeed, we need you and other families to consider your best pledge towards this effort.*
- *Your generous pledge will inspire others to pledge as well.*
- *It would mean a great deal if you were able to join us.*
- *Your pledge to this campaign will help us to generate momentum and will inspire others to make their best pledges as well.*

## MAKING THE PLEDGE REQUEST

When making the request, it is important to speak confidently and unapologetically for the request. Below are some options in making the financial request.



- *Jack and Mary, while I do not know your own financial situation or other obligations, I know we will need the help of every [PARISH] family in order to reach our goal. It is my hope that you will prayerfully consider supporting the campaign with a pledge of \$3,600 for each of the next 5 years, for a total pledge of \$18,000. Is this something you would consider?*
- *Jack and Mary, you have shown strong support for [PARISH]. Today, on behalf of [PASTOR] and the entire volunteer team, I ask you to prayerfully consider a pledge of \$2,400 a year for five years, for a total pledge of \$12,000. Will you join me in this effort?*
- *Jack and Mary, we are asking families to make their best pledges to help meet the parish goal. With that in mind please prayerfully consider a pledge of \$150 per month for the next 60 months, for a total pledge of \$9,000. Will you join us?*

PLEASE WRITE YOUR PLEDGE REQUEST PARAGRAPH HERE:

### AFTER MAKING THE PLEDGE REQUEST, PLEASE WAIT FOR A RESPONSE!

Allow the parishioner(s) the opportunity to absorb your request, uninterrupted. Your quietness will demonstrate the importance of the request. The best thing you can do is:

Silently count to ten and allow  
them to respond first. This will  
start a conversation.

Then handle the response...

## HANDLING THE RESPONSE

Following your request for a specific pledge, the parishioners will most likely have one of four reactions:

- Yes.
- We will need time to decide.
- We will pledge, but less than requested.
- No, or “not now.”

POSSIBLE RESPONSES	YOUR RESPONSE
<p>We certainly want to participate but we need some time to consider this request.</p>	<ul style="list-style-type: none"> <li>• This is a positive response and likely one you will hear most often.</li> <li>• As families are being asked to make a pledge to the best of their ability, a good deal of thought and prayer is often needed.</li> </ul> <p><i>Suggested Response: I am happy to hear you want to help, and I understand this is a big decision. I did not expect an immediate answer and I thank you for taking this request seriously. Why don't you think about this, pray, and let's meet again briefly on Saturday morning.</i></p> <p><i>Or: I also took some time to consider my pledge. It was an important decision for my family and I'm glad we prayed on it.</i></p> <p>Next steps:</p> <ul style="list-style-type: none"> <li>• When granting their request for more time, it is important to schedule a follow-up meeting 5-7 days after the initial visit.</li> </ul>



<p>Asks for more time continued</p>	<ul style="list-style-type: none"> <li>• Please avoid leaving the pledge form behind with the family even if they say they will complete and return it on their own. The objective is to create a situation where the family's final response to the request is via a personal conversation.</li> <li>• Consider writing immediately to the family once you have returned to your office or home. Thank them for the meeting and highlight the important points discussed. Confirm the date of your follow-up visit.</li> </ul>
<p>Yes, I think we can commit that much over the next 5 years!</p>	<ul style="list-style-type: none"> <li>• Thank the family for their pledge.</li> <li>• Ask the family to consider the suggested down payment of 10%. A down payment is optional, but some parishioners would like to start paying their pledges right away and they provide much-needed funds early on. Checks should be payable to "Love One Another."</li> <li>• Help the family complete the pledge form, indicating the date that they would like to start their pledge payments, a pledge payment schedule, and their method of payment.</li> <li>• Please bring the completed pledge form and any down payment with you to the next campaign report meeting!</li> </ul>
<p>Offers less than requested</p>	<ul style="list-style-type: none"> <li>• The goal of this visit is not necessarily to secure a gift immediately.</li> <li>• Encourage the family to spend time prayerfully considering a five-year pledge to this extraordinary campaign.</li> <li>• If, however, the offer of a pledge is made in the spirit of the request and the needs of the campaign and seems in line with the ability of the family, you may do well to accept it.</li> </ul>

Declines to make a pledge	<ul style="list-style-type: none"> <li>This is the least likely response. When it does occur, it is important not to judge. Your role in such an instance should be to thank the family for their time and leave the door open for a possible pledge at a later point.</li> </ul> <p><i>Suggested Response: I appreciate you meeting with me and understand you are not able to make pledge right now. Please keep the campaign in your prayers, and should your situation change, there will be opportunities to make a pledge later. Thank you for your time.</i></p>
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## PLEASE REMEMBER

- Wait until a family has decided on their best pledge before handing them a pledge form to complete and return to you. Remove the pledge form from the packet before the visit.
- Timely and persistent follow-up demonstrates the importance of the pledge request. Polite, persistent, communication without any pressure is key to receiving best pledges.
- Conduct follow-up within five-to-seven days.
- Schedule a time for follow-up during your initial visit—it is one less phone call to make.
- Smile. You will sound considerably more pleasant when you talk, both in person and over the phone.
- Speak enthusiastically about the parish plans and important Catholic ministries throughout our 10 counties of southeastern Wisconsin.
- Find components of the campaign you are passionate about and emphasize those in your visit. Parishioners will listen with their hearts when they know you are speaking from yours.
- Call your Parish Campaign Director, before, after, or even during your visit with any questions. They are here to help and are most effective when you make use of them!