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Frequently Asked Questions

1. **What are donor reports and where can I find them?**

Pastors have regular access to online donor reports at reports.archny.org. There are two reports under the *Renew + Rebuild* folder, the first of which includes all donors. The second report includes only lapsed donors. If you are having trouble logging into your online donor report, please contact the Donor Database Center at (646) 794–3385. The lapsed donor summary report will also be provided and reviewed in your initial meeting with your assigned redemption campaign manager.

2. **Who do I contact for any gift processing questions or pledge changes?**

Please direct all gift processing questions and changes, including address changes, corrections to pledge amounts, gifts of stock, online giving, planned giving, or matching gifts, to the *Renew + Rebuild* Office at (646) 794–2008 or renew.rebuild@archny.org.

3. **What are acceptable methods of payment?**

Acceptable methods of payment include check, credit card, direct debit and gifts of stock. Other ways to give include online via the *Renew + Rebuild* website, charitable trust gifts, matching gifts, and planned gifts.

*The Archdiocese of New York is unable to accept cash payments* for the *Renew + Rebuild* campaign. Parishes that receive cash payments from parishioners are asked to photocopy/scan all documentation received – including any payment card or note – and to write an exchange check (payable to *Renew + Rebuild*) for the total payment amount with the name and information of the parishioner clearly labeled on a blank billing slip *(See Appendix A)*. Payments should be mailed to the *Renew + Rebuild* campaign office with the accompanying billing coupon. If cash comes directly to the *Renew + Rebuild* office, it will be sent back to the parish to be replaced with a parish check for the cash amount.

4. **What if the parish receives new gifts after the active phase of the campaign?**

After the conclusion of the campaign, any new pledges should be sent to the address below for gift processing. Please remember to keep copies or scans of the pledge forms, checks, and/or money orders for parish records.

*Renew + Rebuild* Campaign Office  
1011 First Avenue, 14th Floor  
New York, NY 10022

5. **Will donors receive tax letters?**
Each January, tax information will be mailed to parishioners who made payments of $250 or more in the previous calendar year.

The Importance of Stewardship and the Parish’s Critical Role in Pledge Redemption

“Stewardship is the grateful response of a Christian disciple who recognizes and receives God’s gifts and shares these gifts in love of God and neighbor.”

Once a capital campaign has passed its active solicitation phase, it is in a parish’s best interest to establish a culture of stewardship to help maximize the results of their campaign activities. Stewardship is a way of life and a manner of action. As part of a pledge redemption communications plan, the parish should encourage parishioners to experience and live out their call to discipleship, through the parish, with the added invitation and opportunity to extend this discipleship to the wider diocesan and universal church.

It is recommended that a parish implement the Renew + Rebuild pledge redemption plan to maintain campaign communication and help establish a culture of stewardship that encourages parishioners to continue to invest their time, talent, and treasure. Transparent and regular communication about redemption and plans detailing the renovation and improvement projects at the parish will help donors feel confident in their long-term pledges to the campaign.

The Archdiocese will continue to provide management and administrative support throughout the redemption period, but just as each individual parish’s role was central in the success of their campaign, the parish’s participation in pledge redemption is critical.

REDEMPTION OBJECTIVES

The following pages are a guide for pledge redemption and serve four primary functions:

1. To facilitate the collection and redemption of all campaign pledges while thanking major donors who may have already completed their pledge;

2. To ensure the parish and Archdiocese respond quickly and appropriately with donors who fall behind in their pledge payments;

3. To provide a strategically customized outline for parishes’ communication with campaign donors; and

4. To establish a culture of stewardship throughout the Archdiocese and foster collaborative
partnerships with parishes.

Steps Towards Successful Redemption

Historically, 85-88% of the amount pledged to a campaign such as Renew + Rebuild can be collected. Similar parishes have experienced success above this rate when they commit to their tailored plan. Monthly donor reports provided by the Campaign Office should be monitored closely, and action must be taken where necessary to avoid the possible loss of gifts. Pledges are considered lapsed if a donor has not made a payment within 60 days of a monthly, quarterly, bi-annual, or annual reminder.

The following steps are recommended for parishes to help ensure appropriate campaign follow-up:

- **A customized redemption plan** tailored to your parish needs will be outlined for you. We encourage you to collaborate with your assigned campaign manager, who will guide you throughout your redemption activity timeline.

- **Schedule bi-weekly meetings** with your assigned campaign manager. These meetings will be used to discuss and prepare your approved redemption activities and materials. Your campaign manager will also be reporting on your outreach progress. Ideally, the parish is asked to set aside (1) hour for each meeting.

- **Inform the parish secretary** on how to monitor progress on a monthly basis by logging in to reports.archny.org to receive updates on new pledges received at the campaign office and review your parish’s progress in redeeming commitments. Campaign managers will provide your lapsed donor report prior to your first meeting and will assist the parish in tracking redemption activity and outreach.

- **Appoint lay leaders** (Campaign Executive Committee (CEC) members or Finance Council members) to serve on a Redemption Committee, who can present a summary of parish pledge redemption at quarterly Finance Council meetings and assist with outreach to parishioners regarding their payments.

- **A combination of lapsed donor letters will be sent** from the Renew + Rebuild office who have not made payments within 60 days of their last reminder. Any communication to delinquent donors
should be as personal as possible. Additional templates for pastor follow-up will be provided to the parish if activity is approved.

- **Regularly update parishioners about the impact their donations are making.** As you make progress on projects that are funded by the campaign, please share updates with your parishioners through the bulletin, pulpit announcements and social media marketing.

- **Send additional thank you letters to top donors** who have completed their pledge to enhance the parish’s culture of stewardship so parishioners continue investing their time, talent and treasure.

- **Host virtual stewardship events** with both major gift lapsed donors and top donors that have fulfilled their pledges.

Implementing the above steps will position your parish to continue receiving strong support from its many dedicated parishioners and will maximize long-term success.

**ADNY Redemption Schedule**

The Archdiocese will send out regular pledge reminders to *Renew + Rebuild* donors to foster a habitual giving pattern, resulting in greater likelihood to realize the full amount of the commitment. Parishes can expect the below to be sent on behalf of the Archdiocese:

1. A series of lapsed donor letters, under the signature of Bishop Walsh, will be sent from the *Renew + Rebuild* office to donors who have not made payments within 60 days, 120 days and 180 days of their last reminder *(See Appendices C-E).*
   a. Before letters are sent each month, pastors will have the chance to review the list of recipients for their parish and inform the campaign office if any donors should not receive the letter due to special circumstances.
   b. Before sending the letters from Bishop Walsh, the *Renew + Rebuild* office will also review donors at the $10k+ level to determine whether a more personal approach is required.

2. A corresponding e-mail to both lapsed and zero-paid donors from the *Renew + Rebuild* office detailing how to make payments and provide additional campaign information.

3. Parishioners will receive a corresponding pledge reminder letter and billing slip from the *Renew + Rebuild* office that will be sent dependent on their pledge payment schedule *(See Appendix A and B).*

4. Unless the *Renew + Rebuild* office is contacted directly by a donor who indicates that they would like their pledge to be written off, no pledge will be written off until a donor has missed payments for 8 consecutive months. Pastors will be contacted for permission to officially write off the pledges of these unresponsive donors.
PLEDGE PAYMENTS

Donors are sent reminders according to the pay schedule they chose. All payments by check should be mailed in the return envelope provided in the pledge reminder mailing.

Payments should not be made through the parish; however, in cases where this happens, the parish should forward the payment directly to the Campaign Office with the pledge coupon. If the payment was erroneously made to the parish via a personal check, the parish can mail the parishioner’s check with a payment coupon that has all pertinent donor information (Full Name, Address, ID #, Amount of pledge, Amount of Payment) to the Campaign Office.

If parishioners have questions about their payment schedule or pledge reminders, please have them contact the Campaign Office directly at (646) 794–2008.

LAPSED DONOR CLASSIFICATION

The table below outlines the four key donor classifications. Lapsed donor letters will be sent to donors who fall under classifications three and four:

<table>
<thead>
<tr>
<th>Classification of Donors</th>
<th>Explanation</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 On Schedule Donors</td>
<td>Donors consistently make payments on schedule.</td>
<td>Mr. and Mrs. Smith made a $5,000 pledge in January 2016 and have made monthly payments since February 2016.</td>
</tr>
<tr>
<td>2 Donors with Deferred Payments</td>
<td>Donors recently made a pledge but did not yet make a payment.</td>
<td>Mr. Peterson made a $5,000 pledge in January 2016. He deferred his first annual payment to begin in August 2016.</td>
</tr>
<tr>
<td>3 Lapsed Donors with Payments</td>
<td>Donors made payments on pledges but became lapsed due to skipped or late payments.</td>
<td>Ms. Johnson made a $5,000 pledge in January 2016 and made four monthly payments in February, March, April, and May. She has missed payments in June and July, more than 60 days, becoming a lapsed donor.</td>
</tr>
<tr>
<td>4 Lapsed Donors with No Payments</td>
<td>Donors made pledges with no payments on record and became lapsed.</td>
<td>Mr. Peters made a $5,000 pledge in January 2016. To date, he has not made a payment and he has received pledge reminders on a monthly basis.</td>
</tr>
</tbody>
</table>
Parish Redemption Strategy

CAMPAIGN MANAGER ROLE

Prior to your initial redemption meeting with the Renew + Rebuild team, you will be assigned a campaign manager, S will provide continuous redemption support and outreach. Your campaign manager will be tasked with:

1. Providing a customized plan and timeline based on your parish’s needs and community
2. Reviewing lapsed donor report and ensuring proper outreach
3. Assisting with material development and redemption related activities
4. Training your parish staff and campaign volunteers on your outlined redemption methods
5. Track outcomes of your outreach efforts and report weekly on progress

PRIORITIES FOR LAPSED DONOR OUTREACH

When engaging lapsed donors, it is recommended that the parish segment their lapsed donor list by the following strategy:

1. Major gift lapsed donors (>10,000)
2. Lapsed donors (>1,000)
3. Zero-paid (>1,000 that have not made payment within the last 8 months)

Your campaign manager will assist in segmenting your donors by the above priorities to ensure maximized redemption success.

PARISH REDEMPTION PLAN

A personalized redemption plan is key to every parish’s success. Therefore, it is recommended that parishes in specific blocks and/or communities, follow the outlined methods:

1. Parishes that ran their campaign during the Pilot/Block 1/Block 2 phases are expected to have redeemed an average of 87% of their pledges raised total.
a. These parishes will likely require engaging in personal follow-up, given the significant gap in timing from the campaign’s end and beginning formal redemption engagement.

b. The recommended redemption method for parishes within these blocks is a focus on personal pastor follow-up and stewardship. This will include pastor phone calls, letters, e-mails and potentially assistance with communications from lay leadership.

2. Parishes that ran their campaign during the Block 3/Block 4/Final phases are expected to have redeemed an average of 51% of their pledged raised total.

   a. These parishes will likely have a better chance at redemption, ideally focusing on not just in-pew donors but also major gift lapsed donors.

   b. The recommended redemption method for parishes within these blocks is a combination of personal pastor follow-up for high-level lapsed donors as well as lay leadership communication catered to in-pew donors. This may also include bulletin inserts, pulpit announcements, and social media/e-mail marketing.

**REDEMPTION ACTIVITIES**
Depending on a parish’s finalized redemption plan and timeline, lapsed donors could be engaged in the following ways:

1. In addition to the lapsed donor letters sent on behalf of (Bishop Walsh), parishes are also encouraged to mail personal follow up letters to lapsed donors to prompt continued payments. A personal letter from the pastor have achieved greater success than letters sent from the Renew + Rebuild office (See Appendix F).

2. A personal phone call from the pastor or a campaign volunteer is encouraged to follow-up on lapsed donors. Similar to the process for soliciting gifts, it is important to take a personal approach when contacting lapsed donors. This call should help clarify the payment schedule, impress upon the donor the appreciation for their contribution, and confirm whether the original payment terms will be resumed or if another schedule will be implemented. These personal calls are a critical step in the pledge redemption process (See Appendix I).

3. Personal thank you letters and virtual stewardship events are also encouraged as an additional step to engage major gift lapsed donors, and to also thank donors and enhance the culture of stewardship at the parish.

   a. A campaign progress update letter can be used as a thank you letter for parishioners who have completed their pledges (See Appendix G).
4. In addition to letters and follow-up calls, parishes are encouraged to publicize online giving via bulletin inserts, pulpit announcements and/or direct parish wide e-mails (if applicable to the parish dependent on personalized plan). Setting up automatic payments from parishioners is ideal for a parish to realize consistent cash flow (See Appendices H-L).

5. If applicable, parishes are also encouraged to publicize pledge redemption via their website and social media accounts (see Appendix K).

### Five-Week Timeline

<table>
<thead>
<tr>
<th>Week</th>
<th>Benchmark</th>
<th>Action Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Planning</td>
<td>Weekly ongoing redemption training begins</td>
<td>Review portfolio assignments and parish strategy buckets</td>
</tr>
<tr>
<td></td>
<td>Encourage parish to send at least one mailing during 5-week engagement period. For PAC Loan parishes this will be on a case-by-case basis</td>
<td>Review operational procedures for meetings</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Review pastor toolkit and timeline</td>
</tr>
<tr>
<td>2. Planning</td>
<td>Schedule introductory meeting with assigned parishes</td>
<td>Schedule introductory meetings with pastors</td>
</tr>
<tr>
<td></td>
<td>Send R+R materials</td>
<td>Email/provide pastor lapsed donor report</td>
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<tr>
<td></td>
<td></td>
<td>Present checklist to determine activity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Begin preparing personalized materials for redemption activities based on checklist (after meeting)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Report weekly on meetings/activity to team and pastor</td>
</tr>
<tr>
<td>3. Planning</td>
<td>Approve redemption activities and personalized materials</td>
<td>Meet with pastors and train on redemption</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Schedule follow-up meetings with pastors</td>
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<tr>
<td></td>
<td></td>
<td>Document redemption activities in Smartsheet</td>
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<tr>
<td></td>
<td></td>
<td>Get approval from pastors on redemption materials</td>
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<tr>
<td></td>
<td></td>
<td>Receive approval to begin parishioner outreach calls</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Begin identifying Redemption Committee members to assist with additional outreach</td>
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<tr>
<td></td>
<td></td>
<td>Report weekly on meetings/activity to team and pastor</td>
</tr>
<tr>
<td>Week 1</td>
<td>Initial outreach calls begin</td>
<td>Pastor lapsed donor letter #1 sent (optional)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Bulletin Insert/Pulpit Announcement #1</td>
</tr>
<tr>
<td>Week</td>
<td>Task Description</td>
<td>Notes</td>
</tr>
<tr>
<td>------</td>
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</tr>
</tbody>
</table>
| Week 2 | Identify/Recruit Redemption Committee members | Pastor email update #1 sent (consider Thank you Letter mailing)  
Social media redemption post (if applicable)  
Report weekly on meetings/activity to team and pastor |
| Week 3 | Train Redemption Committee/Parish Secretary  
Assign outreach calls to Redemption Committee/Parish Secretary | Bulletin Insert/Pulpit Announcement #2  
Social media redemption post (if applicable)  
Document redemption activities on Smartsheet  
Report weekly on meetings/activity to team and pastor  
Recruit Redemption Committee members to assist with additional outreach |
| Week 4 | Pastor Lapsed Donor Letter | Document redemption activities on Smartsheet  
Report weekly on meetings/activity to team and pastor  
Optional: Pastor lapsed donor letter sent  
Optional: Pastor thank you letter & email update #2 sent  
Bulletin Insert/Pulpit Announcement #4  
Social media redemption post (if applicable) |
| Week 5 | Finalize lapsed donor outreach | Document redemption activities on Smartsheet  
Report weekly on meetings/activity to team and pastor  
Finalize lapsed donor outreach  
Social media redemption post (if applicable)  
Bulletin Insert/Pulpit Announcement #5 |
| Post-Engagement | Provide five-week progress to pastor | Document redemption activities on Smartsheet  
Report weekly on meetings/activity to team and pastor  
Provide 5-week progress overview to pastor |
Post-Campaign Communications

Each donor who made a gift to Renew + Rebuild has made an investment in their local parish priorities. As such, they will appreciate being kept informed of the progress of the campaign, including the pledge redemption process and how the monies are being used to meet the needs of the parish.

Communication about campaign progress will also motivate donors to continue fulfillment of their pledges. Effective post-campaign communications will greatly assist with that goal.

In addition to lapsed donor letters mailed from, parishes are encouraged to use bulletin inserts, e-mails, social media engagement and pulpit announcements to reactivate last donors.

The following sections detail specific materials that the Archdiocese will use in communication with lapsed donors. This toolkit also provides the parish with the following:

- Lapsed donor letter from pastor
- Sample thank you letter from pastor
- Sample email to promote online giving
- Sample bulletin inserts and pulpit announcements
- Talking points for parishioner outreach calls
- Sample social media posts

RECURRING CAMPAIGN INFORMATION

We highly recommend that the parish ensure a recurring space in their bulletin and/or website (see below) to share regular updates on the campaign pledge redemption progress.

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**Renew + Rebuild Campaign Update**

*Pledge Total: $XXXX*

*Cash Collected To Date: $XXXX*

*Percent of Cash Collected To Date: X%*

If you have any questions regarding the fulfillment of your pledge, please call the Campaign Office at (646) 794–2008 or visit www.renewrebuild.org and click ‘Donate’.

Thank you for your unwavering generosity and support of our parish!