

Building a Family of Faith

2021 Annual Ministries Appeal



Diocese of **Monterey**



Caitlin Fillmore
Director of Stewardship
& Development

Goals for this Presentation

- ▶ Understand basic fundraising principles to inform your AMA
- ▶ Discuss the new approach for the 2021 AMA
- ▶ Introduce tools to support your AMA efforts
- ▶ Provide a space to discuss fundraising in our current situation



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Basic Toolbox for Fundraising

- ▶ Culture of Philanthropy
- ▶ Donor Cultivation Cycle
- ▶ Case for Support
- ▶ Segmentation



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What is a Culture of Philanthropy?

- ▶ An intentional decision made at your nonprofit to make every moment a chance to build a relationship
- ▶ Infused year-round into:
 - ▶ All departments
 - ▶ All systems
 - ▶ All employees

- ▶ What CoP is NOT
 - ▶ A trend
 - ▶ A finish line
 - ▶ A strategy
 - ▶ Only the fundraiser's responsibility



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**How can we
enthusiastically,
abundantly, and
consistently share our
mission by living it?**



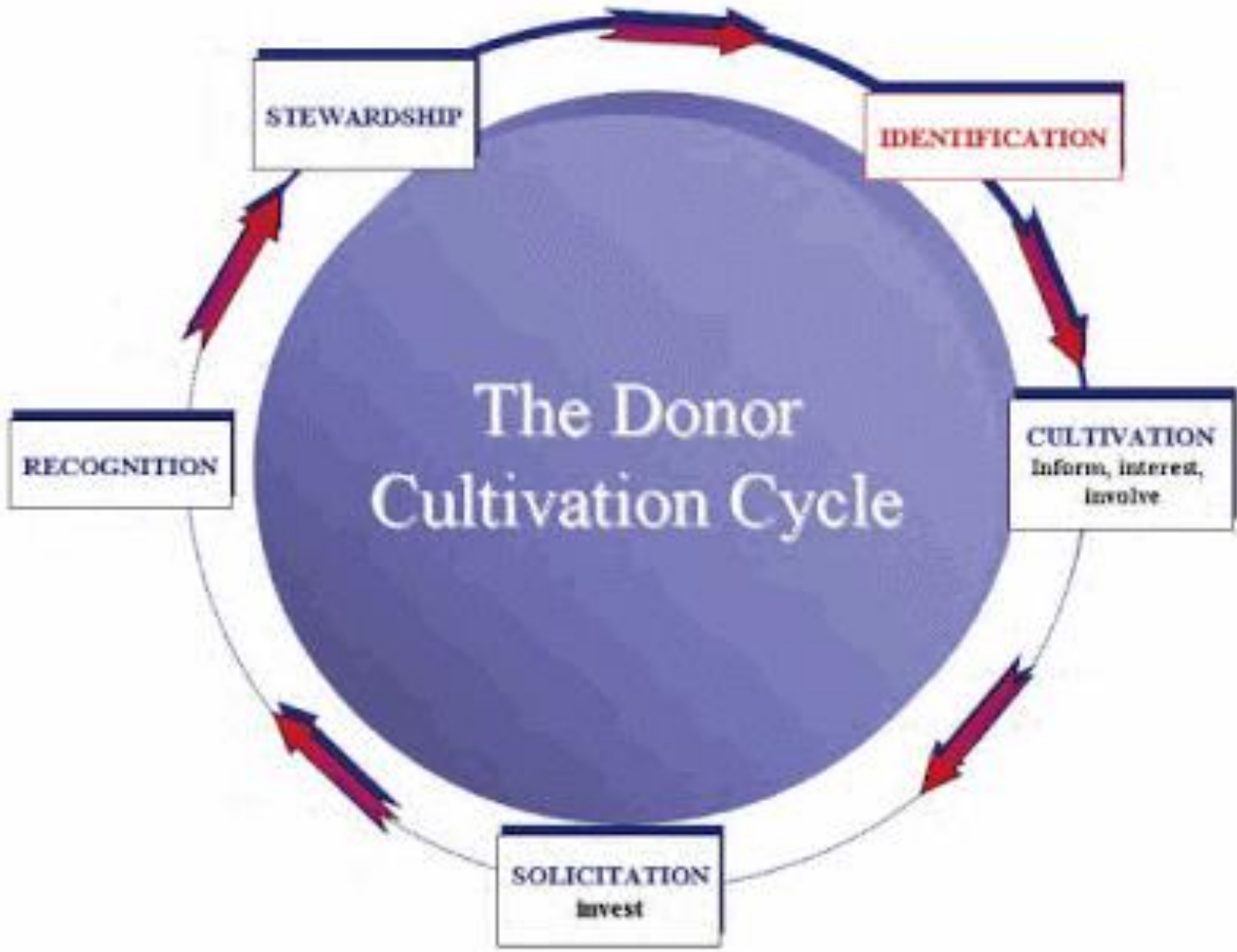
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Where does CoP appear?

- ▶ Recruiting and cultivation
- ▶ Perks and extras
- ▶ Understanding of mission and empowerment to achieve mission together
- ▶ Dedication to fairness, transparency, trust



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Case for Support

- ▶ The backbone of your verbal and written asks
- ▶ “Elevator Speech” for all staff, volunteers, etc.
- ▶ Three components
 - ▶ The Need
 - ▶ Our Response
 - ▶ The Investment



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Because of the generous support from our donors, all services are offered free of charge.

There are no income eligibility requirements and individuals with a cancer diagnosis need only to live or work in Hancock County to receive services.

More than 350 individuals in Hancock County are diagnosed with cancer each year.

A cancer diagnosis is emotionally, physically, and financially devastating for patients and their families. During this critical time, every day activities can feel overwhelming and important decisions about healthcare coverage and treatment options can be difficult to navigate.

The need for services is large and growing

CPS staff and volunteers have long faced the challenge of meeting the needs of every cancer patient in Hancock County.

Today, the challenge is intensified by recent changes in health insurance coverage. Higher deductibles and out-of-pocket expenses are forcing more patients to ask for help.

Since 1946 we have helped over 10,000 people and their families within Hancock county which equals over 4 million in today's dollars.



Compassionate Services that help reduce stress and help patients cope.



FINANCIAL

Reimbursement for cancer-related medications
 Reimbursement for mileage to and from cancer-related appointments
 Reimbursement for out-of-pocket expenses and insurance costs
 Assistance with cost of specialty items, such as prosthetic devices and wigs
 Emergency funds



PHYSICAL

Nutritional supplements
 Medical supplies
 Equipment loans



PATIENT NAVIGATION

Assistance with obtaining health insurance coverage
 Assistance with reading, understanding, and paying medical bills
 Personal connections to other community services
 Assistance with applying for Social Security Disability, Medicare & Medicaid benefits



EMOTIONAL

Private sessions with a licensed mental health professional
 Support groups
 Bereavement support



HEALING ARTS

Massage therapy
 Reiki
 Art expression
 Essential Oil Education

IT STARTS WITH YOU

CORE FACILITY

21,900 ft²

\$10.9 mil

+ SOCCER ARENA

+14,100 ft²
+ \$375k

\$11.3 million
TOTAL

+ POOL (outdoor)

+ 12,000 ft²
+ \$1.7 mil

\$13 million
TOTAL

+ GYM

+ 4,400 ft²
+ \$1.9 mil

\$14.9 million
TOTAL

HELP US GET THERE

This \$15 million campaign will create 26,300 ft² YMCA facility, with added outdoor program space, including:

- Health & Wellness
- Community Cafe
- Adventure Park
- Child Watch
- Lockers/Showers
- Parking
- Pool/Splash Area
- Gymnasium
- Group Exercise
- Soccer Arena
- Multi-Purpose
- Landscaping

Future expansion can include a pool enclosure and other improvements to address community needs.



Segmentation

- ▶ Making the appropriate ask for the person
- ▶ Identify your Segments
 - ▶ Major Donors
 - ▶ Beneficiaries
 - ▶ Special Projects (Catechetics, Capital Projects, etc.)



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2021 AMA

- ▶ Building a Family of Faith
- ▶ Bishop Letter
 - ▶ No change for 2021
 - ▶ Mandatory 2022



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2021 AMA

▶ Pastor Letter

- ▶ Diocese takes on cost and administrative tasks!
- ▶ Mailing includes letter, envelope and brochure
- ▶ What we need from you
 - ▶ Letterhead with Pastor signature
 - ▶ Mailing List of ALL parishioners you want to receive the letter
 - ▶ Approval of letter by December 1



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A	B	C	D	E	F	G	H
First Name	Last Name	Spouse	Address	City	State	Zip	
Smith	Donor	Sally	425 Church St	Monterey	CA	93940	

Please submit an **Excel File** with the following layout by **December 1, 2020**.

Column 1: First Name

Column 2: Last Name

Column 3: Spouse Name

Column 4: Address

Column 5: City

Column 6: State

Column 7: Zip



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2021 AMA

▶ “In-Pew” Donations

- ▶ Envelopes will be available for “in-pew” donations received
- ▶ Envelopes will be labeled for processing at the Diocese office
- ▶ At this time, in-pew envelopes can be used for safe, limited, in-person interactions as approved at your parish.



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2021 AMA Timeline

- ▶ NOVEMBER 15 – Parish Letter draft sent to parishes for approval
- ▶ DECEMBER 1 – Parishes send mailing list database
- ▶ FEBRUARY 1 – Bishop Letter mailed
- ▶ FEBRUARY 12 – Pastor Letter mailed*
- ▶ FEBRUARY 17 – Ash Wednesday

*If you typically use a different timeline for your mailing, you can still maintain that schedule this year. Please work with the OSD to determine the mailing deadlines that work for you!



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Additional AMA Resources

- ▶ Annual Report
- ▶ Stewardship Resources on website
- ▶ Flocknote
- ▶ Marketing Plan
- ▶ Online Giving



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Office of Stewardship & Development

- ▶ Talk through Case for Support
- ▶ Draft letters and verbiage
- ▶ Assist with grantwriting
- ▶ Coordinate mailings and mail merge
- ▶ Maintain secure and detailed database
- ▶ Assist with online and social media giving
- ▶ Help build alumni networks



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THANK YOU!

- ▶ Caitlin Fillmore, Director of Stewardship and Development
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 - ▶ 831-645-2808



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