



**BISHOP'S  
ANNUAL APPEAL**

LIVING THE *joy* OF THE GOSPEL

TELEPHONE FOLLOW UP MANUAL

2021



# INTRODUCTION

On behalf of Bishop Robert Brennan and the Office of Development and Planning, we thank you for volunteering to assist with the follow-up efforts of the Bishop's Annual Appeal. Your gift of time and talent will impact the overall efforts at your parish and benefit so many diocesan ministries, programs, services and agencies.

The Telephone Follow-up is the final step in the Appeal solicitation process. Follow-up efforts are conducted to encourage and increase parishioner participation. There are two methods of follow-up solicitation available for the parish to use:

- Pastor's Follow-up letter (see page 20 of the Instruction and Reporting Procedures Manual)
- Telephone Follow-up Phone Calls

This manual specifically explains the Telephone Follow-up solicitation method.

## TELEPHONE FOLLOW-UP

Making phone calls can be very beneficial to the parish's overall participation. Speaking directly to parishioners establishes lines of communication and offers an opportunity to explain the benefits of the Bishop's Annual Appeal. This also allows parishioners to make a well-informed decision, encourage their participation and can result in an immediate gift.

Phone calls are made only to households within the parish that have not responded to the Appeal, meaning they did not pledge a gift amount, offer a one-time gift, nor indicate that "No Gift" would be offered to the BAA. A list of parish households that should be included in the Telephone Follow-up Solicitation can be determined by the BAA reporter's remaining Pink ID Labels or by contacting your parish support coordinator in the Office of Development and Planning for a listing.

Once the parish has determined who needs to be contacted, the Parish Staff or Bishop's Annual Appeal leadership should prepare the Telephone Follow-up Cards and a group of volunteers should be assembled to assist with the calls (see following page). A date, time, and place for volunteers making calls should also be coordinated. Volunteers can gather in one central location to make phone calls, or volunteers can make the calls individually from their home.

Follow-up calls can begin two or three weeks after the Bishop's Annual Appeal Weekend, which is May 1 - 2, 2021. The length of time a parish spends making phone calls depends on the number of calls that need to be made and the number of volunteers available to make the calls. It is best to divide up the calls among the volunteers and allow them two weeks to complete a group of calls. We recommend a total of 15 to 25 calls per volunteer. As a suggestion, if the volunteer completes their phone calls early they may want to make additional calls. All phone calls should be completed by the last week of reporting. Please refer to the 2021 BAA Calendar on pages 8 and 9 of the Instruction and Reporting Procedures Manual for a suggested timeline.

Please read the Telephone Follow-up Manual before making any phone calls, paying close attention to the Helpful Hints and Facts and Figures pages (see pages 3 and 4). This information will help each volunteer to prepare when making calls.

## MATERIALS NEEDED

- Telephone Follow-up Manual —provides information and tools to facilitate the follow-up phone call process. Each volunteer should receive one manual. Please read the manual before making any phone calls.
- Pre-labeled Telephone Follow-up Cards — The parish staff or Bishop’s Annual Appeal leadership will provide Telephone Follow-up Cards with Pink ID Labels affixed. The Pink ID Labels contain the contact information of the parishioners, including the phone number.

## INSTRUCTIONS

1. Determine how many calls need to be made. This can be identified after all pledge/gift envelopes have been received and processed from Bishop’s Annual Appeal Weekend or “Sign-up During Mass” and volunteer stations. The remaining Pink ID Labels should provide the necessary call list or you can contact your Parish Support Coordinator (PSC) in the Office of Development and Planning to obtain a listing. The Parish Staff or Appeal Leadership should attach all remaining Pink ID Labels directly to the Telephone Follow-up Cards and then provide them to the volunteers.
2. Assemble a group of volunteers to assist with the calls. The number of volunteers is based on the number of calls to be made. Each volunteer should be assigned 15 to 25 phone calls and try to complete the calls within a two-week period. As a suggestion, if volunteers complete their phone calls early they are welcome to make additional calls. The work will seem easy when many are involved.
3. Establish a schedule of dates, times and location for the volunteers to make calls. The time of the phone calls should be made during the week in the evenings from 7:00 p.m. to 8:30 p.m. or on weekends, starting May 22 through June 26. The location could be at the parish facility or each volunteer can make the calls from their home.
4. Conduct a training session with the volunteers before making the calls. Provide each volunteer with a copy of this Telephone Follow-up Manual. Review the Helpful Hints and Facts and Figures on pages 3 and 4 of this manual. Be sure to address any questions the volunteers have prior to making calls. Conduct a brief “run-through” of the suggested script on page 7 of this manual.
5. Provide the pre-labeled Telephone Follow-up Cards to the volunteers, allowing them to choose whom they will call. Once volunteers have selected their group of names, it is very important that each volunteer fill out the Volunteer Contact Form found in the back of the manual. Volunteers should list all the names of the families they will be calling. This Volunteer Contact Form should be returned to the parish staff or Appeal leadership before calls are made.
6. Ask volunteers to rubber band their completed Telephone Follow-up Cards together and return them to the parish staff or Appeal leadership. When reporting the telephone follow-up results to the diocese, send the Telephone Follow-up Cards with your weekly Parish Report (Form 10). See additional instructions on page 20-22 of the Instruction and Reporting Procedures Manual.

## HELPFUL HINTS

### Be informed:

Information about the Bishop's Annual Appeal is provided on pages 4 - 6 of this manual. Please read the information and share it during your phone conversation. It is helpful to share how the funds support our diocese and parish families.

### Be personal:

Keep in mind that you are making phone calls to fellow parishioners. It is more personal when their name is used. He or she will listen more attentively to what you have to say if you are courteous. Thank the parishioner for their time or consideration whether or not they make a gift at this time.

### Participation:

The goal of the phone call is to inform and share details about the Bishop's Annual Appeal and to encourage everyone to participate at any level. No gift is too small. Remind them that the diocese truly needs the support of all our members in order to continue its outreach of charity, education, and other religious services. Ask them to pray for the success of the Bishop's Annual Appeal. Refer to pages 4 - 6 of this manual for additional information.

### Etiquette:

The best time to call is during the week in the evenings from 7:00 p.m. to 8:30 p.m. or on weekends. Let the phone ring at least five times before hanging up. Offer to call back if the parishioner is busy. Avoid calling at mealtime or late hours.

### Answering Machines or Voice Mail:

We suggest that you speak directly to a person and avoid leaving messages. If the parishioner is not answering, try again later.

### Handling objections:

Above all, do not fear objections because this will tell you just how well informed each parishioner is about the parish and the Bishop's Annual Appeal. Listen to their concerns and see if you are able to ease their concerns.

### If they are upset with the parish, diocese or refuse to give:

Allow the parishioner to share his or her feelings. Once they have shared their feelings, they may be more receptive to what you have to say. Above all, do not argue. We want to encourage participation, not discourage it. Please record the response of the person you are speaking to on the Telephone Follow-up Card. Use either the boxes provided or the "Other" area.

### Make Notes on Telephone Follow-up Card:

The cards are designed specifically for the Telephone Follow-up process and provide extra space for notes or additional information.

### No contacts:

If after several attempts, you are unable to contact a parishioner, please check the appropriate box on the card, "Unable to contact." In July, the Office of Development and Planning will send a final follow-up mailing to all those who were not contacted.

# FACTS and FIGURES

## Diocesan Information

- ❖ The diocesan goal for 2021 is \$6.85 million.
- ❖ The Bishop's Annual Appeal is the major fundraising effort conducted annually throughout our 23-county diocese with all parishes participating.
- ❖ The Bishop's Annual Appeal provides funds for ministries, programs, and services in education, charity, spiritual formation, pastoral ministry, parish assistance, and much more. See pages 6-7 for additional information or visit the diocesan website at <http://columbuscatholic.org/>.
- ❖ Every parish exceeding its parish goal will receive 100% of payments received over and above the parish's goal, free from the diocesan assessment.
- ❖ Pledges may be paid either as a one-time gift or over 10 months from June 2021 through March 2022.
- ❖ Every gift is tax-deductible.
- ❖ We ask that every family of our diocese pray for the success of the Appeal and consider making a gift to the Appeal. No gift is too small.

## 2020 Bishop's Annual Appeal Facts and Figures

- ❖ The 2020 Appeal realized more than \$7.2 million in pledges with more than \$6.7 million paid as of February 15, 2021.
- ❖ The average pledge in the 2019 Appeal was \$455.25.
- ❖ A total of 16,169 households contributed to the 2020 Appeal.
- ❖ Fifty (50) parishes exceeded their goal, providing nearly \$700,000 for the needs of our individual parishes and missions.
- ❖ The 2020 Miter Society included 2174 members, welcoming more than 251 new members.
- ❖ The 2020 Miter Society pledged more than \$4.3 million towards the \$6.85 million goal.
- ❖ The 2020 Miter Society average gift was \$1,991.04.

## Parish Information

Please contact your pastor or parish administrator for the most recently updated information below:

Our 2021 Parish Goal: \$\_\_\_\_\_

Amount Pledged last year: \$\_\_\_\_\_

Number of Donors last year: \_\_\_\_\_

# ALLOCATION of FUNDS

The money raised through the Bishop's Annual Appeal financially assists the following ministries, programs, and offices. Please visit [www.columbuscatholic.org](http://www.columbuscatholic.org) for more information on diocesan offices, ministries, and events.

## OFFICE OF VOCATIONS

- Education and formation of seminarians pursuing a vocation to the priesthood.
- Funds events and programs such as the Andrew Dinners and Learn to Discern.

## OFFICE OF THE DIACONATE

- Offers comprehensive formation, continuing education, workshops, and retreats for all Deacons and Diaconate candidates.

## OFFICE FOR DIVINE WORSHIP

- Assists the office to support the Bishop in his role as chief liturgist for our diocese.
- Funds help to support the spiritual and pastoral programs such as RCIA, celebration of Confirmation and celebration of Episcopal Liturgies for parishes and groups.

## RELIGIOUS EDUCATION AND CATECHESIS OFFICE

- Supports all Parish School of Religion teachers and parish catechists to form the foundations of faith for young minds.

## OFFICE OF CATHOLIC SCHOOLS

- Provides tuition assistance to families in need.
- Offers grants to secondary schools for capital needs and financial support for faculty and staff development and curriculum enhancement.

## MARRIAGE AND FAMILY LIFE OFFICE

- Provides marriage preparation for couples and life enrichment programs to families.
- Funds ministries, programs, and workshops on parenting and natural family planning (NFP).

## OFFICE FOR SOCIAL CONCERNS

- Funds the overall goals and mission of the office to build social order through systemic change.
- Services as local liaison for national programs: Catholic Relief Services and Campaign for Human Development.

## CATHOLIC ETHNIC MINISTRIES

- Supports the mission of Catholic Ethnic Ministries to promote education, spiritual growth, and evangelization within the various ethnic communities in our diocese.

## DIOCESAN COUNCIL OF CATHOLIC WOMEN

- Helps to support, empower, and educate all Catholic Women in spirituality, leadership, and service.

# ALLOCATION of FUNDS

## JOINT ORGANIZATION FOR INNER-CITY NEEDS (J.O.I.N.)

- Supports the mission of J.O.I.N. to reach out to those who are in need, Catholic and Non-Catholic alike.

## OFFICE OF YOUTH AND YOUNG ADULT MINISTRY

- Provides funding for ministries and programs for youth and young adults at parishes, in Catholic schools, and on college campuses within our diocese.

## INSTITUTIONAL ASSISTANCE

- Provides programs for the elderly, crisis intervention, and spiritual care of the hospitalized and the infirm.

## ASSISTANCE TO PARISHES

- Offers an opportunity for parishes to receive funding to be used for the needs of the parish.

# TELEPHONE FOLLOW-UP GUIDELINES

## Making the Call:

After you have reviewed the information in this manual and selected those parishioners whom you will be contacting, your phone calling can begin. Remember that most parishioners are aware of the Bishop's Annual Appeal from the brochure they received in the mail in late April. Appeal posters, parish bulletins, and pulpit talks have been shared with the community as well.

Try to inform your fellow parishioners of the importance of their participation, and the benefit to the parish. Let them know that they can participate by making a gift or pledge in a manner that suits their personal financial situation. Remember, every gift is important.

## Suggested Telephone Script:

"Hello (Parishioner's Name), my name is (Your Name). I am calling from (Parish Name) on behalf of (Pastor's Name) and Bishop Brennan. I serve on the parish committee for the Bishop's Annual Appeal and we are making phone calls to discuss the importance of the Appeal and to ask for your participation."

"As a parish, it is important to encourage every family to participate by making a gift or pledge to the Appeal. Your gift or pledge directly impacts the number of ministries, services, and programs throughout our diocese. In addition, your participation also helps our parish. The goal for our parish this year is \$ \_\_\_\_\_, and once we have achieved this goal, the funds we raise above this amount will be returned to our parish to be used for [insert the use of the funds returned to the parish]."

"Our diocese touches the lives of those within the 23 counties and 108 parishes and missions. As you can tell the need is great knowing the number of people residing in these areas. Thousands of individuals are served daily by this outreach. Understand your gift will make a vital impact on these lives and continue to support our Catholic faith. We are asking for your participation. No matter the amount, your gift is important and I know (Pastor's Name) and Bishop Brennan will greatly appreciate your generosity.

Would you be able to help support our faith community by making a gift or pledge?"

If the parishioner responds "yes" — "That's great. Thank you for your generosity. You can make a gift or pledge right over the phone today. Are you able to make a pledge and pay it in the next 10 months or would you prefer to make your gift in a different manner?"

If the parishioner makes a pledge – "Again, your pledge can be paid in 10 monthly payments, if you wish. It can be arranged for you to receive monthly reminder statements sent directly to you in the mail."

\*\*Verify the contact information on the Pink ID Label and correct anything incorrect. Accurately record the pledge information on the Telephone Follow-up Card and clarify the gift or pledge payment schedule with the parishioner.\*\*

"On behalf of (Pastor's Name) and Bishop Brennan we thank you very much for your support!"

If the parishioners ask what other options are available - You do have the option to make your gift using the diocesan online giving time tool at [www.columbuscatholicgiving.org](http://www.columbuscatholicgiving.org). Look for the "Make A Gift Now" button to direct you to the Online Giving portal. You can choose to debit your bank account or charge your credit card for a pledge with scheduled payments or a one-time gift.

If the parishioner responds "no" — "Thank you for your time. Perhaps you will consider giving to the Bishop's Annual Appeal in the future. Please pray for the success of our efforts and have a nice evening."

*If the parishioner has already given, is no longer a member of the parish, or if you are unable to contact the parishioner please check the appropriate box on the Telephone Follow-up Card.*

\*\* Make sure to record all responses on the Telephone Follow-up Card.\*\*

<div style="border: 1px dashed black; padding: 10px; width: fit-content; margin: 0 auto;"><b>[Place Pink Label Here]</b></div>	<h3>The Bishop's Annual Appeal Telephone Follow-up Card</h3>
	<b>Total Gift: \$</b> _____
<b>If no gift is made, please check one of the following:</b>	<b>Will pay balance:</b>
<input type="checkbox"/> Refused <input type="checkbox"/> Not interested <input type="checkbox"/> Unable	<input type="checkbox"/> 5 monthly payments <input type="checkbox"/> 10 monthly payments
<input type="checkbox"/> Already gave	<b>or bill in the following months:</b>
<input type="checkbox"/> Belong to another parish	<input type="checkbox"/> June <input type="checkbox"/> November
<input type="checkbox"/> Unable to contact	<input type="checkbox"/> July <input type="checkbox"/> December
<input type="checkbox"/> Other: _____	<input type="checkbox"/> August <input type="checkbox"/> January
_____	<input type="checkbox"/> September <input type="checkbox"/> February
	<input type="checkbox"/> October <input type="checkbox"/> March
	<small>Form 2A Rev. 31 Mar 09</small>

# VOLUNTEER CONTACT FORM

*Please fill out and return this form to your Bishop's Annual Appeal Leader before making phone calls.*

Volunteer's Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone Number: \_\_\_\_\_

*I will be calling the following parish families:*

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_
- 6. \_\_\_\_\_
- 7. \_\_\_\_\_
- 8. \_\_\_\_\_
- 9. \_\_\_\_\_
- 10. \_\_\_\_\_
- 11. \_\_\_\_\_
- 12. \_\_\_\_\_
- 13. \_\_\_\_\_
- 14. \_\_\_\_\_
- 15. \_\_\_\_\_
- 16. \_\_\_\_\_
- 17. \_\_\_\_\_
- 18. \_\_\_\_\_
- 19. \_\_\_\_\_
- 20. \_\_\_\_\_
- 21. \_\_\_\_\_
- 22. \_\_\_\_\_
- 23. \_\_\_\_\_
- 24. \_\_\_\_\_
- 25. \_\_\_\_\_



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