

PLEDGE CAMPAIGN TASK FLOW CALENDAR

RESOURCE 2.14



Planning should be done with measurable objectives. Where possible, list dates for completion and names of those held responsible for completion. This is a master planning document for a small church and so should be revised throughout the campaign to add items which need to be accomplished. It is both plan and archive so that new plans do not need to be re-invented by new leadership year after year. Larger churches will have more complex plans.

December	The end of last year's annual campaign is marked with careful gift acknowledgement. Thank you letters are sent. The thank you letters, phone calls and notes are simultaneously the last event of the last campaign and the first event of the next campaign. This process is a hinge and the two campaigns overlap here like a <i>mandorla</i> .
March	Open staff and lay leadership input and creative conversation hosting on design, theme, content, schedule of campaign
March	Hand written thank you notes, written after the formal thank you letters and written by a recruited team of lay volunteers (peer to peer) end the thank you process for the last gift and begin the first cultivation of the next gift. <ul style="list-style-type: none"> • Recruit Advance Campaign Chair. • Design advance campaign letter system, schedule, goals, and case materials. • Review advance campaign prospect lists to determine special asks for major gifts. • Tell Vestry/Bishop's Committee that you will be expecting early pledges as an act of leadership and modeling.
April/May	Write an article and publish: how the last campaign went and an introduction to the next campaign. What went well? What was funded? Why was their gift valuable to mission?
April	First quarter collections/thank you letter to all donors confirming pledge and confirming amount paid and amount still due (note: all collections letters need to look like thank you letters but include pledge payment status. These letters end when the pledge is fully paid.)
April	Detailed campaign theme collaborative input <ul style="list-style-type: none"> • Two world café input sessions with staff and clergy • Two theme conversations with stewardship commission • Two conversations with lay leadership
May	Pledge campaign theme and case material design generation—discernment of the stewardship commission/committee, clergy, program staff, and committee chairs.

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RESOURCE 2.14 (CONT'D.)

May	Case materials production. Brainstorming of possible Ministry Minute speakers. Develop list and then refine for recruitment.
June	Planned Giving Sunday and event. Ministry Minute leaders are recruited. Ministry Minute speakers are recruited (8 plus two understudies).
June	Advance campaign launch. Sunday or weekday adult formation regarding money, gratitude, and personal budgeting/financial wellness is designed for fall Sundays/weekdays.
June	Phone-a-Thon is designed and planned. Recruitment for October events begins.
July	Plan campaign special events. <ul style="list-style-type: none"> • Kick-off: menu, volunteers, event plan, budget, and secure leader. • Campaign ending dinner (all congregation): menu, volunteers, event plan, budget, and secure leader.
July	Second quarter collections/thank you letter to all paying donors, confirming pledge and confirming amount paid and pending due. No letter sent to paid pledgers.
August	Campaign direct mail warm-up letters to all non-advance campaign prospects. Phone-a-Thon callers are recruited. Advance campaign ends and all remaining prospects are called to secure pledge early. Liturgical writing is completed: A collect for the prayers of the people, an announcement draft, and a bulletin draft are written—adjusted for real-time as they are inserted.
Aug. 1 - Sept. 15	Ministry Minute one-on-one sessions for editing. Drafting of Weekly: collects, bulletin announcements and celebrant announcements (themed weekly from Ministry Minutes).
September 1	Campaign brochure and pledge cards direct mail sent.
September	Phone-a-Thon team coaching.
Mid-September	Stewardship Campaign kick-off.

Eight Weeks of Ministry Minutes:

1. September
2. October
3. October
4. October
5. October
6. November
7. November
8. November last Sunday before Thanksgiving

October	(3 weeknights and two Saturdays) — Encouragement Phone-a-Thons.
October	Third quarter collections/thank you letter to all paying donors confirming pledge and confirming amount paid. Kick-off: menu, volunteers, event plan, budget.
November	Second week — dinner recruitment and LYBUNT gift request remaining phone-a-Thons.
August – November	Thank you letters are sent within 24 hours of a pledge arrival. <ol style="list-style-type: none"> 1. Letter notes amount of pledge and payment plan confirmation (Rector). 2. Second letter sent from Warden. 3. Handwritten note follows in lay handwritten note project in January.
November	Victory Celebration Stewardship Dinner (goal: 100% of attending families have pledged and increased pledge).
November	Pledge Blessing Sunday—seeking all pledges in by this date. Sunday before Thanksgiving and after Stewardship celebration dinner.
November	Year-end letters (December 15-29) and bulletin inserts/Sunday announcements designed / produced, leader recruited.
November 26	Thanksgiving letter thanking donors for coming to the stewardship dinner (or “we missed you” letters are sent) to attendees.
Late November after Thanksgiving	Fourth quarter collections/thank you letter to all paying donors confirming pledge and confirming amount paid.
Mid-December	Year-End letter and brochure sent to all donors and donor prospects (members).

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RESOURCE 2.14 (CONT'D.)

January - February Campaign evaluation.

Thank you note letter-writing campaign.

Next campaign design phase begins with input sessions, theme development, focus group input programs, and date planning.

1. Schedule.
2. Recruitment.
3. Thank you process is being reviewed.
4. Metrics of last campaign reviewed.
5. Campaign themes imagined.