

Annual Pledge Campaign Processes and Tasks—2010-2011

Form Annual Pledge Committee and Links to Important Groups or People in the Congregation

- Form core team
- Connect with Minister--July
- Connect with Kris Simpson
- Engage consultants—website and chalice development, face book
- Establish Connection with Finance Committee, Board Liaison, and Board

APC Meeting

- Use email communication
- Set up meeting dates and agenda
- What can be done outside of meetings and what needs to be done during a meeting?
- Where to meet?

Schedule Pledge time, Establish Pledge Goals, Coordinate Pledge activities

- Set Pledge dates—begin and end
- Determine Goal for pledge
- Interact with Board and Finance Committee

Pledge Communication Plan

Theme and focus development

- What is main theme for pledge this year?
- Why pledge?
- What are some of the key points we wish to make about pledging this year?
- ““Test” market theme ideas—seek Board input, Council on Committees, Kris Simpson? Other input needed? Congregational meeting?

What is our approach? Generic info to everyone or tailored to individual? Direct contacts? Or same as previous year?

Pledge Packet development

- Should we have a packet? Contents? Timing?

Newsletter Campaign—

- Pledge related articles to start when?
- Monthly through the end of pledge including a pledge wrap up and thank you note
- Assign responsibilities/ coordinate with Newsletter Deadline

Web Based Campaign

Develop pledge web page—

- Determine the purpose of the page—info and ease of pledging and or payment process?

- What to include on site? Background info—what is pledging and pledging guidelines/ pledging is for friends and members—perhaps friends would like to donate? Pledge form, EFT form
- Link to UUC site and to UUC Face book page
- Email campaign—send out info on emails
- Sunday Events
 - Coordinate with Minister on Pledge related services and sermon(s)
 - Announcements about pledging
 - Pledging Testimonials
 - Coffee Hour—Kick off event? Information? Committee member presence during campaign?
 - Pledge ending event—giant thank you?
- Pledging Promotional Material
 - Banner?
 - Chalice Pledge Tracker?
 - Brochures? Update, amend
 - Letters—from Board President? Kick off
 - Thank you's
- Personal communications
 - Board phone calls set up to encourage pledging and the importance of pledging
 - Board President and or minister letter or messages on pledging

Pledging Implementation Plan

- Create master Schedule and Task Lists for all the above
 - Review Calendar in order to get on agenda or set up meetings in a timely manner
 - Be aware of important deadlines, Sunday services scheduling, Board dates
 - Responsibilities are clearly delegated
- Pledge mechanics—
 - When can people start to pledge?
 - Who to contact? How to contact?
 - What to include in pledging form—EFT or other info? Notice on when new pledge will start
- How to track progress—
 - Who has donated and not donated?
 - Pledge cumulative totals
 - Use of the pledge chalice tracker
 - Coordinate activities between Kris Simpson, committee and board as needed
 - How to handle comments or questions from congregation—someone is disgruntled? Any training needed here?

How to respond to a pledge? How and when to thank pledgers?

Wrangling—letter writing and phone calls

Decide on process? When to start recruiting?

Board reminder calls? Reminder notes? Clean up phone calls

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Review Pledge process and prep for next year

Final meeting and wrap up

Seek feedback from congregation, board, Kris Simpson, minister, others on what went well and what to improve?

Create a written record of process that incorporates info

Begin to recruit APC members for next year

R.Peck 9.15.10