



Capital Campaign Deliverables

PARISH CHECKLIST

Last Updated: [Insert Date]

*****NOTE: This is a guide that should be customized for each capital campaign.*****

Pre-campaign Responsibilities			
<i>This phase focuses on the preparation needed for capital campaign approval.</i>			
Timeline	Item	Checklist	Status
[Insert Date]	Conduct a Wealth Screen	<ul style="list-style-type: none"> <input type="checkbox"/> CFOCF provides data needs to parish <input type="checkbox"/> Parish returns data file to CFOCF <input type="checkbox"/> CFOCF syncs data and finalizes wealth screen 	[Not Started/In Progress/Complete]
[Insert Date]	Wealth Screen Results Review	<ul style="list-style-type: none"> <input type="checkbox"/> CFOCF reviews wealth screen with parish to determine giving capacity for a capital campaign 	[Not Started/In Progress/Complete]
[Insert Date]	Diocesan Finance Committee (DFC) Meeting Request	<ul style="list-style-type: none"> <input type="checkbox"/> Parish sends a letter to the DFC regarding the need for a capital campaign and requests meeting date 	[Not Started/In Progress/Complete]
[Insert Date]	Ecclesiastical Properties (EP) Project Coordination	<ul style="list-style-type: none"> <input type="checkbox"/> Parish meets with EP to discuss scope of project and requests project cost and renderings for meeting with DFC <input type="checkbox"/> Parish shares details with CFOCF to assist with DFC preparation 	[Not Started/In Progress/Complete]
[Insert Date]	DFC Meeting Preparation	<ul style="list-style-type: none"> <input type="checkbox"/> Parish/CFOCF prepare materials needed for the DFC presentation on [Insert Date] <ul style="list-style-type: none"> o CFOCF will provide Foundation's Service Agreement and Wealth Screen o CFOCF will gather OCA stats to share at DFC (if needed) 	[Not Started/In Progress/Complete]
[Insert Date]	DFC Meeting and Approval	<ul style="list-style-type: none"> <input type="checkbox"/> Parish and CFOCF meet with DFC to gain approval for capital campaign <ul style="list-style-type: none"> o <i>Approval is needed before any additional campaign work can be done by CFOCF</i> 	[Not Started/In Progress/Complete]

[Insert Date]	The Catholic Foundation's Service Agreement	<input type="checkbox"/> CFOCF provides the parish with a service agreement once the scope of work has been confirmed <input type="checkbox"/> Parish signs service agreement prior to the Preparation Phase <input type="checkbox"/> CFOCF signs contract and provides executed copy to parish	[Not Started/In Progress/Complete]
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Campaign Preparation + Silent Phase
[Approximately 10 weeks]
The preparation phase focuses on putting together key items needed before fundraising begins. The silent phase seeks to engage all parishioners, community members, and other interested prospects, who have the financial ability and inclination to make a larger gift.

Timeline	Item	Checklist	Status
Early Campaign Preparation <i>[Insert Dates]</i>			
[Insert Date]	Campaign Timeline - Planning	<input type="checkbox"/> CFOCF will share campaign calendar planning document with parish on [Insert Date]	[Not Started/In Progress/Complete]
[Insert Date]	Case for Support	<input type="checkbox"/> CFOCF will provide a Case for Support Worksheet on [Insert Date]	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Prayer	<input type="checkbox"/> CFOCF to provide campaign prayer examples to the parish on [Insert Date]	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Logo	<input type="checkbox"/> CFOCF to share campaign logo design examples by [Insert Date]	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Brochure	<input type="checkbox"/> CFOCF to provide parish with digital brochure samples on [Insert Date]	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Committee - Overview	<input type="checkbox"/> CFOCF to provide Campaign Cabinet Roles and Responsibilities reference guide by [Insert Date]	[Not Started/In Progress/Complete]
[Insert Date]	Data Clean-up and Sync	<input type="checkbox"/> Contact Diocesan IT and begin Data Clean-up and Sync process (if wealth screen was not conducted, or was conducted within the last month)	[Not Started/In Progress/Complete]
Week 1 <i>[Insert Dates]</i>			
[Insert Date]	Capital Campaign Post Approval Kickoff Meeting		[Not Started/In Progress/Complete]
[Insert Date]	Campaign Committee - Overview	<input type="checkbox"/> CFOCF to discuss Campaign Cabinet Roles and Responsibilities, training, and meetings with the parish on [Insert Date]	[Not Started/In Progress/Complete]
[Insert Date]	Finalize Ask Amounts	<input type="checkbox"/> Parish is asked to complete the following:	[Not Started/In Progress/Complete]

		<ul style="list-style-type: none"> <input type="checkbox"/> Review “CFOCF Recommended Ask Amount” and enter “Parish Ask Amount” in the Wealth Screen spreadsheet for each parishioner <input type="checkbox"/> Return completed Wealth Screen to CFOCF by [Insert Date]. 	
[Insert Date]	Campaign Logo - Overview	<ul style="list-style-type: none"> <input type="checkbox"/> Parish/CFOCF to discuss on [Insert Date]: <ul style="list-style-type: none"> o Campaign name o Campaign slogan o Campaign theme to direct logo creation <input type="checkbox"/> CFOCF can design the parish’s campaign logo (<i>Note: Graphic design fees will be incurred for this service</i>) <input type="checkbox"/> Parish to confirm if they would like CFOCF to design campaign logo and provide creative preferences and brand guidelines by [Insert Date]. <input type="checkbox"/> CFOCF will provide a quote for this service by [Insert Date] 	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Brochure	<ul style="list-style-type: none"> <input type="checkbox"/> CFOCF can design the parish’s brochure (<i>Note: Graphic design fees will be incurred for this service.</i>) <input type="checkbox"/> Parish to confirm if they would like CFOCF to design campaign brochure by [Insert Date] 	[Not Started/In Progress/Complete]
[Insert Date]	Case for Support	<ul style="list-style-type: none"> <input type="checkbox"/> Parish to complete worksheet by [Insert Date] <input type="checkbox"/> CFOCF will incorporate information from the Case for Support in all campaign materials. 	[Not Started/In Progress/Complete]
[Insert Date]	Project Renderings	<ul style="list-style-type: none"> <input type="checkbox"/> Parish to provide black and white and/or color renderings to CFOCF after finalized with Ecclesiastical Properties 	[Not Started/In Progress/Complete]
[Insert Date]	Parish Photos	<ul style="list-style-type: none"> <input type="checkbox"/> Parish to provide photos of the Pastor, parish mass and gatherings, church and other images that highlight the life of the parish 	[Not Started/In Progress/Complete]
[Insert Date]	Parish Logo + Brand Guidelines	<ul style="list-style-type: none"> <input type="checkbox"/> Parish to provide logo in .jpg, .png, .eps, .ai file formats <ul style="list-style-type: none"> o Please include all color and style variations <input type="checkbox"/> Parish to provide brand guidelines 	[Not Started/In Progress/Complete]
[Insert Date]	Pastor Signature	<ul style="list-style-type: none"> <input type="checkbox"/> Parish to provide an image file of the pastor’s signature 	[Not Started/In Progress/Complete]

[Insert Date]	Parish Details	<input type="checkbox"/> Parish to provide mailing address for campaign replies <input type="checkbox"/> Provide Parish Phone Number to be used for Campaign Inquiries <input type="checkbox"/> Provide parish preference for “Make checks payable to:” instructions	[Not Started/In Progress/Complete]
[Insert Date]	Parish Letterhead & Envelope	<input type="checkbox"/> Parish to determine if they would like to use their parish logo letterhead or campaign specific letterhead for campaign communication by [Insert Date] <input type="checkbox"/> If campaign letterhead is needed, Parish to provide their digital letterhead files to be used as a reference for campaign letterhead.	[Not Started/In Progress/Complete]
Week 2 [Insert Dates]			
[Insert Date]	Identify and Group Lead and Major Donors	<input type="checkbox"/> CFOCF will identify major donors to meet with during the silent phase and share feedback with the parish by [Insert Date] <ul style="list-style-type: none"> ○ Identify Major Gifts (Leadership Gifts) for one-to-one meetings (<i>notated as LG below</i>) ○ Identify Special Group A donors in the Wealth Screen for small group (face-to-face or virtual) meetings (<i>notated as SG-A below</i>) ○ Consider Special Group B donors with whom you may also wish to meet for small group (face-to-face or virtual) meetings (<i>notated as SG-B below</i>) 	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Cabinet – Establish, Train & Set Meeting Dates	<input type="checkbox"/> The pastor will need to assemble a campaign cabinet to help oversee the campaign efforts within the parish. <input type="checkbox"/> Parish to schedule meeting dates <input type="checkbox"/> CFOCF to train Campaign Committee (<i>if needed</i>)	[Not Started/In Progress/Complete]
[Insert Date]	Graphic Design Cost Proposal and Approval	<input type="checkbox"/> If Parish has opted to use CFOCF graphic design vendor for the brochure, a quote will be provided by [Insert Date]	[Not Started/In Progress/Complete]

		<input type="checkbox"/> Parish to review and approve quote by [Insert Date]	
[Insert Date]	Campaign Timeline - Planning	<input type="checkbox"/> Parish asked to review, set dates/times/locations, and provide feedback to CFOCF by [Insert Date]	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Prayer	<input type="checkbox"/> Parish to write and share campaign prayer with CFOCF by [Insert Date]	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Theme	<input type="checkbox"/> Parish to share the following with CFOCF. These items will be incorporated throughout campaign materials. <ul style="list-style-type: none"> ○ Campaign name ○ Campaign slogan ○ Campaign theme ○ Campaign logo – moved to a separate line item 	[Not Started/In Progress/Complete]
[Insert Date]	Brochure	<input type="checkbox"/> Parish to provide brochure format choice to CFOCF by [Insert Date] based on examples provided.	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Brochure (Copy Draft)	<input type="checkbox"/> CFOCF will share brochure copy draft by [Insert Date]	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Letters I	<input type="checkbox"/> CFOCF will share letter draft copy with the Parish by [Insert Date] <ul style="list-style-type: none"> ○ Letter 1 – Letter from the Pastor included in Brochure ○ Letter 2 - Invitation to Leadership Gift and Special Gift Gatherings ○ Letter 3 – Ask Letter (Leadership Gifts/Major Donor) ○ Letter 4 – Acknowledgement/Thank You Letter ○ Letter 7 – Letter of Intent and Gift Agreement 	[Not Started/In Progress/Complete]
[Insert Date]	Online Giving Page (Form)	<input type="checkbox"/> CFOCF will share online giving page form by [Insert Date]	[Not Started/In Progress/Complete]
Week 3			
[Insert Dates]			
[Insert Date]	Campaign Logo (Image File)	<input type="checkbox"/> Parish to provide CFOCF with logo files to incorporate into materials <ul style="list-style-type: none"> ○ The logo needs to be PMS spot colors (2 would be ideal, but 1 color will also work). 	[Not Started/In Progress/Complete]

		<ul style="list-style-type: none"> ○ Vector file (.ai or .eps) needed 	
[Insert Date]	Campaign Brochure (Copy Draft)	<input type="checkbox"/> Parish review and feedback needed by [Insert Date]	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Letters I	<input type="checkbox"/> Parish review and feedback of all letters needed by [Insert Date] <ul style="list-style-type: none"> ○ Letter 1 – Letter from the Pastor included in Brochure ○ Letter 2 - Invitation to Leadership Gift and Special Gift Gatherings ○ Letter 3 – Ask Letter (Leadership Gifts/Major Donor) ○ Letter 4 – Acknowledgement/Thank You Letter ○ Letter 7 – Letter of Intent and Gift Agreement 	[Not Started/In Progress/Complete]
[Insert Date]	Online Giving Page (Form)	<input type="checkbox"/> Parish to complete online giving page form by [Insert Date]	[Not Started/In Progress/Complete]
[Insert Date]	Printing Cost – Review & Approval (Silent + Active Phase Materials)	<input type="checkbox"/> CFOCF will provide estimated printing costs for all collateral material with their preferred vendor by [Insert Date] <input type="checkbox"/> Parish asked to review and approve cost prior to printing	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Timeline - Calendar	<input type="checkbox"/> CFOCF will review parish campaign calendar planning document and populate a full campaign calendar/timeline by [Insert Date]	[Not Started/In Progress/Complete]
Week 4			
[Insert Dates]			
[Insert Date]	Campaign Committee(s)	<input type="checkbox"/> Campaign cabinet and campaign leadership gifts committee (if applicable) begin meeting weekly <input type="checkbox"/> CFOCF Stewardship Director is available to attend all campaign committee weekly meetings until the active phase begins either in person or virtually to provide campaign status updates	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Timeline - Calendar	<input type="checkbox"/> Parish asked to review and approve the Campaign Calendar by [Insert Date]	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Letters I	<input type="checkbox"/> CFOCF will make all requested edits and finalize letters by [Insert Date]	[Not Started/In Progress/Complete]

		<ul style="list-style-type: none"> ○ Letter 1 – Letter from the Pastor included in Brochure ○ Letter 2 - Invitation to Leadership Gift and Special Gift Gatherings ○ Letter 3 – Ask Letter (Leadership Gifts/Major Donor) ○ Letter 4 – Acknowledgement/Thank You Letter ○ Letter 7 – Letter of Intent and Gift Agreement 	
[Insert Date]	Envelopes (Print Proof)	<input type="checkbox"/> CFOCF will share printer proofs <input type="checkbox"/> Parish feedback/approval needed, complete [Insert Date Range] <ul style="list-style-type: none"> • Envelope Types: <ul style="list-style-type: none"> ○ 6.5 x 9.5 ○ #10 ○ #9 (A - addressed to the parish) ○ #9 (B - addressed to the Foundation) <input type="checkbox"/> Deep Flap Remittance (general)	[Not Started/In Progress/Complete]
[Insert Date]	Letterhead (Print Proof)	<input type="checkbox"/> CFOCF will share printer proofs by [Insert Date] <input type="checkbox"/> Parish feedback/approval needed	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Prayer Card (Print Proof)	<input type="checkbox"/> CFOCF will share printer proofs by [Insert Date] <input type="checkbox"/> Parish feedback/approval needed	[Not Started/In Progress/Complete]
[Insert Date]	Brochure (Print Proof)	<input type="checkbox"/> CFOCF will share printer proofs by [Insert Date] <input type="checkbox"/> Parish feedback/approval needed	[Not Started/In Progress/Complete]
[Insert Date]	Pledge Card (Print Proof)	<input type="checkbox"/> CFOCF will share printer proofs by [Insert Date] <input type="checkbox"/> Parish feedback/approval needed	[Not Started/In Progress/Complete]
[Insert Date]	Online Giving Page (Preview Page)	<input type="checkbox"/> CFOCF will share online giving page preview by [Insert Date]	[Not Started/In Progress/Complete]
[Insert Date]	Major Donor Reception - Preparation	<input type="checkbox"/> Parish to confirm date/time/location/needs from CFOCF <input type="checkbox"/> Parish to consult with CFOCF on event agenda and messaging recommendations	[Not Started/In Progress/Complete]
Week 5 [Insert Dates]			

[Insert Date]	Schedule LG, SG-A, SG-B 1-1 Meetings Starting Week 7	<input type="checkbox"/> Pastor and/or campaign committee contact major donors and invite them to one-on-one visits or small group gatherings and receptions	[Not Started/In Progress/Complete]
[Insert Date]	Major Donor Reception - Invitation	<input type="checkbox"/> CFOCF will share parish-wide reception invitation copy drafts <input type="checkbox"/> Parish asked to review, personalize, and send invitation 3-4 weeks prior to major donor reception event date	[Not Started/In Progress/Complete]
[Insert Date]	Online Giving Page (Preview Page)	<input type="checkbox"/> Parish feedback/approval needed by [Insert Date]	[Not Started/In Progress/Complete]
Week 6 [Insert Dates]			
[Insert Date]	Printed Pledge Materials – Major Donors	<input type="checkbox"/> CFOCF provides the Parish with printed materials	[Not Started/In Progress/Complete]
[Insert Date]	Prepare Packets for LG, SG-A, SG-B	<input type="checkbox"/> Prepare pledge packets for major donor meetings (1-1 and Receptions)	[Not Started/In Progress/Complete]
Week 7 [Insert Dates]			
[Insert Date Range]	Conduct LG, SG-A, SG-B One-on-One Meetings (Week 1)	<input type="checkbox"/> Pastor and/or campaign committee member(s) attend major donor meetings. <input type="checkbox"/> Pastor to provide donor with individual pledge packet at each meeting	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Letters II	<input type="checkbox"/> CFOCF will share letter draft copy with the Parish by [Insert Date] <ol style="list-style-type: none"> a. Letter 5 – Pledge Paid in Full b. Letter 6 – Delinquency Letter c. Letter 9 – Pledge Reminder Letter 	[Not Started/In Progress/Complete]
[Insert Date]	Talking Points and Messaging for Parish-wide Phase (Copy Draft)	<input type="checkbox"/> CFOCF will share parish-wide communication. <ol style="list-style-type: none"> 1. Pulpit Announcements – CFOCF to provide talking point recommendations (4 weeks) 2. Prayers of the Faithful – CFOCF to provide prayer copy (4 weeks) 3. Bulletin – CFOCF to provide full page and/or excerpt based on parish needs (4 weeks) 4. Digital – images for website, social media, PPT mass slides 	[Not Started/In Progress/Complete]

		<p>(2-4 options based on parish need)</p> <p>5. FAQ document – CFOCF to work with parish on FAQ document copy for info tables</p> <p><input type="checkbox"/> In-Pew envelopes – CFOCF to ship remittance envelopes to parish</p>	
<p>Week 8</p> <p>[Insert Dates]</p>			
[Insert Date Range]	Conduct LG, SG-A, SG-B One-on-One Meetings (Week 2)	<p><input type="checkbox"/> Pastor and/or campaign committee member(s) attend major donor meetings.</p> <p><input type="checkbox"/> Pastor to provide donor with individual pledge packet at each meeting.</p>	[Not Started/In Progress/Complete]
[Insert Date Range]	Reception RSVP Follow-up and Attendee Reminders	<p><input type="checkbox"/> Communications Committee follows up with those who did not respond by RSVP deadline prior to events.</p> <p><input type="checkbox"/> Communications Committee makes reminder calls to confirmed RSVPs 1-day prior to event.</p>	[Not Started/In Progress/Complete]
[Insert Date Range]	Major Donor Reception - Event	<p><input type="checkbox"/> Parish to conduct Major Donor Reception</p> <p><input type="checkbox"/> Pastor and campaign committee to speak</p> <p><input type="checkbox"/> Provide each donor with a personalized pledge packet</p>	[Not Started/In Progress/Complete]
[Insert Date Range]	Campaign Reports & Process Training	<p><input type="checkbox"/> CFOCF to provide Transmittal Form</p> <p><input type="checkbox"/> CFOCF to provide Campaign Payment Only Form (Fillable)</p> <p><input type="checkbox"/> Note: Is this parish is supported by Diocesan Shared Services?</p> <p><input type="checkbox"/> CFOCF to provide training on active phase reporting processes</p>	[Not Started/In Progress/Complete]
[Insert Date]	Major Donor Transmittal Reporting (Initial)	<p><input type="checkbox"/> Finance manager to submit major donor report to CFOCF and DSAS</p>	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Letters II	<p><input type="checkbox"/> Parish review and feedback of all letters needed by [Insert Date]</p> <ul style="list-style-type: none"> ○ Letter 5 – Pledge Paid in Full ○ Letter 6 – Delinquency Letter ○ Letter 9 – Pledge Reminder Letter 	[Not Started/In Progress/Complete]
[Insert Date]	Pledge Card Chart_Finalize for Personalized and General Packets	<p><input type="checkbox"/> Campaign Director will confirm 2 pledge card gift charts with the parish.</p> <ul style="list-style-type: none"> ○ General Packets (count) ○ Personalized (count) 	[Not Started/In Progress/Complete]

Week 9 <i>[Insert Dates]</i>			
<i>[Insert Date Range]</i>	LG, SG-A, SG-B Pledge Packet Mailing (Non-attendees)	<input type="checkbox"/> Pledge packets for the LG, SG-A, SG-B donors who did not attend the receptions will be mailed directly to constituents	<i>[Not Started/In Progress/Complete]</i>
<i>[Insert Date Range]</i>	Reception Attendee Thank you follow-up	<input type="checkbox"/> CFOCF to provide talking points	<i>[Not Started/In Progress/Complete]</i>
<i>[Insert Date Range]</i>	Reception Non-Attendee follow-up	<input type="checkbox"/> CFOCF to provide talking points	<i>[Not Started/In Progress/Complete]</i>
<i>[Insert Date]</i>	Campaign Letters II	<input type="checkbox"/> CFOCF will make all requested edits and finalize letters by <i>[Insert Date]</i> <ul style="list-style-type: none"> ○ Letter 5 – Pledge Paid in Full ○ Letter 6 – Delinquency Letter ○ Letter 9 – Pledge Reminder Letter 	<i>[Not Started/In Progress/Complete]</i>
<i>[Insert Date]</i>	Major Donor Transmittal Reporting (Continued)	<input type="checkbox"/> Finance manager to submit major donor report to CFOCF and DSAS	<i>[Not Started/In Progress/Complete]</i>
Week 10 <i>[Insert Dates]</i>			
<i>[Insert Date]</i>	General Pledge Packet Materials Shipped to the Parish	<input type="checkbox"/> CFOCF will mail generic pledge materials to the parish. <input type="checkbox"/> Parish will hold on distributing these materials until the active phase.	<i>[Not Started/In Progress/Complete]</i>
<i>[Insert Date]</i>	Campaign Letters III	<input type="checkbox"/> CFOCF will share letter copy draft <ul style="list-style-type: none"> ○ Letter 8 – Follow-up Letter 	<i>[Not Started/In Progress/Complete]</i>
Active (Public) Phase <i>[Insert Dates]</i>			
Week 1 – ANNOUNCEMENT WEEKEND <i>[Insert Dates]</i>			
<i>[Insert Date]</i>	Major Donor Transmittal Reporting (Continued)	<input type="checkbox"/> Parish Finance Manager to submit major donor report to CFOCF and DSAS	<i>[Not Started/In Progress/Complete]</i>
<i>[Insert Date]</i>	General Parishioner Early Messaging	<input type="checkbox"/> Campaign announcement to the parish through multiple methods <ol style="list-style-type: none"> 1. <u>Pulpit message/Video</u>: Initial pulpit message by the Pastor 2. <u>Prayers of Faithful</u>: Include campaign in prayers 3. <u>Bulletin</u>: Initial bulletin announcement (confirm digital link) 4. <u>Digital</u>: TBD by the parish. Options include website, social 	<i>[Not Started/In Progress/Complete]</i>

		<p>media, slide projection at mass, other</p> <p>5. <u>Information Table</u>: TBD by parish. Tables with committee members after all masses.</p>	
[Insert Date]	Campaign Letters III	<input type="checkbox"/> Parish review and feedback of all letters needed by [Insert Date] <ul style="list-style-type: none"> o Letter 8 – Follow-up Letter 	[Not Started/In Progress/Complete]
Week 2 – COMMITMENT WEEKEND #1 [Insert Dates]			
[Insert Date]	General Parishioner Pledge Mailing - Initial	<input type="checkbox"/> CFOCF will mail personalized pledge packets to all parishioners who were not part of the LG, SG-A, SG-B meetings <input type="checkbox"/> Personalized Ask Letter, Brochure, Response Envelope, Pledge Card	[Not Started/In Progress/Complete]
[Insert Date]	Campaign Letters III	<input type="checkbox"/> CFOCF will make all requested edits and finalize letters by [Insert Date] <ul style="list-style-type: none"> o Letter 8 – Follow-up Letter 	[Not Started/In Progress/Complete]
[Insert Date]	All Capital Campaign Transmittal Reporting (Initial)	<input type="checkbox"/> Finance manager to submit major donor report to CFOCF and DSAS	[Not Started/In Progress/Complete]
[Insert Date]	Commitment Weekend #1 Messaging	<input type="checkbox"/> Campaign messaging to the parish through multiple methods <ol style="list-style-type: none"> 1. <u>Pulpit message</u>: Pulpit message by the Pastor 2. <u>In-Pew</u>: Envelopes placed in each pew. Parishioners place envelopes in basket or bring to the Altar (Pastor/Committee to determine) 3. <u>Prayers of Faithful</u>: Include campaign in prayers 4. <u>Bulletin</u>: Initial bulletin announcement (confirm digital link) 5. <u>Digital</u>: TBD by the parish. Options include website, social media, slide projection at mass, other 6. <u>Information Table</u>: TBD by parish. Tables with committee members after all masses 	[Not Started/In Progress/Complete]
Week 3 – Lay Witness Weekend OR Discernment Weekend [Insert Dates]			

[Insert Date]	All Capital Campaign Transmittal Reporting (Weekly)	<input type="checkbox"/> Finance manager to submit major donor report to CFOCF and DSAS	[Not Started/In Progress/Complete]
[Insert Date]	Lay Witness Weekend Parish-wide Messaging	<input type="checkbox"/> Campaign messaging to the parish through multiple methods <ol style="list-style-type: none"> 1. <u>Lay Witness</u>: Lay Witness talk at each mass (in-person or video) 2. <u>In-Pew</u>: Envelopes placed in each pew. 3. <u>Prayers of Faithful</u>: Include campaign in prayers 4. <u>Bulletin</u>: Bulletin announcement (confirm digital link) 5. <u>Digital</u>: TBD by the parish. Options include website, social media, slide projection at mass, other 6. <u>Information Table</u>: TBD by parish. Tables with committee members after all masses 	[Not Started/In Progress/Complete]
Week 4 – Commitment Weekend #2 <i>[Insert Dates]</i>			
[Insert Date]	All Capital Campaign Transmittal Reporting (Weekly)	<input type="checkbox"/> Finance manager to submit major donor report to CFOCF and DSAS	[Not Started/In Progress/Complete]
[Insert Date]	Commitment Weekend #2 Messaging	<input type="checkbox"/> Campaign announcement to the parish through multiple methods <ol style="list-style-type: none"> 1. <u>Pulpit message</u>: Pulpit message by the Pastor 2. <u>In-Pew</u>: Envelopes placed in each pew. Parishioners place envelopes in basket or bring to the Altar (Pastor/Committee to determine) 3. <u>Prayers of Faithful</u>: Include campaign in prayers 4. <u>Bulletin</u>: Initial bulletin announcement (confirm digital link) 5. <u>Digital</u>: TBD by the parish. Options include website, social media, slide projection at mass, other 6. <u>Information Table</u>: TBD by parish. Tables with committee members after all masses 	[Not Started/In Progress/Complete]

Week 5 – Follow-up <i>[Insert Dates]</i>			
<i>[Insert Date]</i>	Follow up calls	<input type="checkbox"/> Follow up calls to those who have not returned a pledge / gift <input type="checkbox"/> CFOCF to provide phone call scripts <input type="checkbox"/> Parish to provide list of prospects who have not made a commitment / gift, if deemed necessary	<i>[Not Started/In Progress/Complete]</i>
Week 6 – Follow-up <i>[Insert Dates]</i>			
<i>[Insert Date]</i>	Follow up calls	<input type="checkbox"/> Follow up calls to those who have not returned a pledge / gift <input type="checkbox"/> CFOCF to provide phone call scripts <input type="checkbox"/> Parish to provide list of prospects who have not made a commitment / gift, if deemed necessary	<i>[Not Started/In Progress/Complete]</i>
Redemption Phase <i>[Insert Dates]</i>			
<i>[Insert Date]</i>	Redemption Process	<input type="checkbox"/> CFOCF to process pledges/payments provided by the parish and online, send thank you letters, monthly reminders, and periodic delinquency letters (if applicable)	<i>[Not Started/In Progress/Complete]</i>
Follow-up <i>[Insert Dates]</i>			
<i>[Insert Date]</i>	General Parishioner Pledge Mailing – Follow-up	<input type="checkbox"/> CFOCF will mail personalized pledge packets to all parishioners who have not contributed to the campaign to date <input type="checkbox"/> Personalized Ask Letter, Response Envelope, Pledge Card	<i>[Not Started/In Progress/Complete]</i>
Continuation <i>[Insert Dates]</i>			
<i>[Insert Date]</i>	General Parishioner Pledge Mailing – Continuation	<input type="checkbox"/> Parish to determine if they would like a continuation mailer to go out at 1 year and 2 years after initial mailing <input type="checkbox"/> CFOCF will provide the parish with a continuation letter and confirm review and approval. <input type="checkbox"/> CFOCF will mail personalized pledge packets to all non-donors to date new parishioners <input type="checkbox"/> Personalized Ask Letter, Response Envelope, Pledge Card	<i>[Not Started/In Progress/Complete]</i>