

## What we will cover:

- The “WHY”
- Campaign Calendar
- Changes in giving trends
- How to reach different ages & commitment levels
- The roles of gratitude and fun

## Root all Annual Campaign in the “Why”

- Donors do not give money because you need it.
- Why is Annual Giving important?
- Simon Sinek Ted Talk:

## Root all Annual Campaign in the “Why”

### Stewardship Prayer

Lord Jesus Christ, with the great dynamos and birth-giving of your power, you have pulled life from death, freedom from imprisonment, wakefulness from sleep, in-action to action. Help us do the hard work of leadership in stewardship and financial development. Help us to pull a sleepy people weighed down by sleepy distraction and heavy greed into a generous wakefulness of gratitude and mission-investment by helping them give their money away. Help us to set free a church too often confined in the coffins of scarcity so that all Saints may work to unfurl the Kingdom of God. *Amen.*

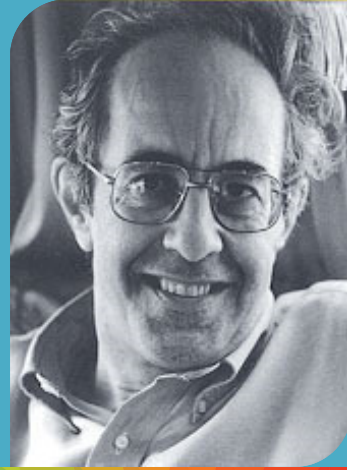
## Root all Annual Campaign in the “Why”



## Root all Annual Campaign in the “Why”

“When fundraising is done right, the person asking and the person giving come together to participate in a new thing that God is doing.”

*The Spirituality of Fundraising*



**ecr** EPISCOPAL  
CHURCH FOUNDATION  
empowering congregations



## Different Types of Giving

### Annual

- Funds operations
- Donor gives from cash flow
- Tied to daily mission & ministry

### Capital

- Funds specific projects, often related to building
- Donor gives from assets
- Tied to future/growth of your mission

### Planned

- Funds perpetual activities
- Donor gives from estate
- Tied to the continuation of your mission

## Best strategy for giving: Plan before fall!



- Planning should be done with measurable objectives.
- Where possible, list dates for completion and names of those.
- It is both plan and archive so that new plans do not need to be re-invented by new leadership year after year.

# Questions?

# PROJECT RESOURCE

A collaborative initiative between:

Episcopal Church Foundation  
The Development Office of the Episcopal Church Center  
The College of Bishops

<http://www.collegeforbishops.org/project-resource-home>

## SAMPLE YEAR ROUND CALENDAR FOR FALL

### JANUARY :

- 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.

# SAMPLE YEAR ROUND CALENDAR FOR FALL GIVING

## FEBRUARY: VOLUNTEER RECRUITMENT



Vocation or calling:

“that place where the world’s great need and your deep hunger meet.”



# SAMPLE JOB DESCRIPTION



### POSITION DESCRIPTION FOR A STEWARDSHIP COMMITTEE MEMBER ST. JOHN'S THE EVANGELIST EPISCOPAL CHURCH - ST. PAUL, MN

#### Stewardship Mission at St. John's

We strive to make stewardship part of the fabric of our daily life together, for all of our members to take ownership and support our church's programs and future by pledging toward our annual campaign and sustaining planned giving options.

#### Membership and Time Commitment

- The Stewardship Committee shall be comprised of at least 6 and up to 8 members of the parish. At the discretion of the Stewardship Chair and Rector, more committee members may be recruited and more volunteers enlisted. Members of the Executive Committee, Rector, and Parish Administrator will be ex officio members.
- The Stewardship Chair is asked to serve a three year term, the first year as co-chair with the incumbent chair and the third year as co-chair with the succeeding chair.
- Stewardship committee members are asked to serve at least one year and no more than three years, and should be prepared to meet at least once a month May through January, as needed February through April, and take accountability for the execution of agreed areas of responsibility.

#### Qualities of a Stewardship Committee Member

The Stewardship Committee Member shall:

**Be spiritually motivated** – A person who is seeking a deep relationship with Jesus and is grateful for that relationship; regularly spends time in prayer, scripture study and regular attendance at Eucharist, will be concerned about the relationship of all parishioners with God as well as the needs of the church.

**Exemplify and live out stewardship** – A person who is already committed to stewardship as a way of life, who volunteers their time in various parish and community activities, who is committed to making a regular and generous financial pledge and additional financial contributions as able to St. John's.

**Envision where stewardship can take the parish** – A person who can work with the rest of the committee and have the same general understanding of stewardship in order that they can move forward together.

**Be comfortable talking about money** – A person who can tie together the concepts of giving of time, talent and treasure.

**Have personal qualities that contribute to success** – A person who follows through on what they have agreed to do and is personable, optimistic, organized, patient, creative and willing to share their faith with others.

#### Responsibilities of the Stewardship Committee

##### Ongoing Stewardship Ministry:

**Stewardship Formation** – Cultivate a powerful and spiritual identification of stewardship as a way of life in our parish through messages in the weekly bulletin, e-newsletter, prayer, monthly newsletter, brochures to be mailed or made available in the gathering area, homilies from the pulpit, use of the parish web site and social media presence, and education programs.

**Children, Youth, and New Member Stewardship** – Encourage stewardship contributions for all levels of Faith Formation and seek to increase children, youth, and new member stewardship awareness, education, and participation.

**Time and Talent** – Communicate opportunities available for all parishioners to share their time and talent with our parish and our community as a whole; prepare a time and talent brochure of parish activities and opportunities, and keep the brochure current.





## SAMPLE TEXT IN DESCRIPTION

- **Annual Pledge Campaign:**
- *Stewardship Chair* – With the assistance of the Rector and Executive Committee the Stewardship Chair is asked to assume primary responsibility for:
  - Recruiting, training, and managing members of the committee and volunteers for the stewardship efforts.
  - Collating, analyzing, and presenting budget information and stewardship data.
  - Making personal asks of donors.
  - Sending a personal thank you to all pledgers and/or donors.
- *Committee Members* - With the assistance of the Parish Administrator and Rector members of the Stewardship Committee are asked to:
  - Assume primary responsibility for creating ideas and themes for the campaign, develop a time and action plan for implementing the campaign, create and collate content for the stewardship materials, and recruit and prepare speakers for the campaign.
  - Assist with the layout and execution of the communication materials, assembling bulk mailings, managing volunteers in stewardship efforts, and making personal asks of donors.

## SAMPLE YEAR ROUND CALENDAR FOR FALL GIVING

### FEBRUARY: VOLUNTEER RECRUITMENT

- Clear timeframe
- Articulated expectations
- Inter-generational leadership
- Skill based, not need based

## SAMPLE YEAR ROUND CALENDAR FOR FALL

### MARCH/APRIL:

- Open staff and lay leadership input and creative conversation hosting on design, theme, content, schedule of campaign
- Design campaign letter system, schedule, goals, and case materials.
- Review 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.

## SAMPLE YEAR ROUND CALENDAR FOR FALL

### 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?
- 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.)
- Case materials production.
- Brainstorming of possible Ministry Minute speakers  
 \*Develop list and then refine for recruitment.

## SAMPLE YEAR ROUND CALENDAR FOR FALL

### JUNE/JULY:

- Ministry Minute speakers are recruited (8 plus two understudies).
- Phone-a-Thon is designed and planned. Recruitment for October events begins.
- Plan campaign special events.
  - Kick-off: menu, volunteers, event plan, budget, and secure leader.
  - Campaign ending dinner (all congregation): menu, volunteers, event plan, budget, and secure leader.
- 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.

## SAMPLE YEAR ROUND CALENDAR FOR FALL

### AUGUST:

- Campaign direct mail warm-up letters to all non-advance campaign prospects
- Phone-a-Thon callers are recruited
- Plan campaign special events.
  - Kick-off: menu, volunteers, event plan, budget, and secure leader.
  - Campaign ending dinner (all congregation): menu, volunteers, event plan, budget, and secure leader.
- 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.

## SAMPLE YEAR ROUND CALENDAR FOR FALL

### SEPTEMBER:

- Drafting of Weekly: collects, bulletin announcements and celebrant announcements (themed weekly from Ministry Minutes)
- Campaign brochure and pledge cards direct mail sent.
- Phone-a-Thon team coaching.
- Stewardship Campaign kick-off.

## SAMPLE YEAR ROUND CALENDAR FOR FALL

### October:

- (3 weeknights and two Saturdays) — Encouragement Phone-a-Thons
- Ministry Minutes
- Third quarter collections/thank you letter to all paying donors confirming pledge and confirming amount paid.
- Kick-off: menu, volunteers, event plan, budget.
- Thank you letters are sent within 24 hours of a pledge arrival.
  - Letter notes amount of pledge and payment plan confirmation (Rector).
  - Second letter sent from Warden.
  - Handwritten note follows in lay handwritten note project in January.

## SAMPLE YEAR ROUND CALENDAR FOR FALL

### NOVEMBER:

- Celebration Event----Mark the end of the campaign!
- Pledge Blessing Sunday
- Year End letters---end of the year gift opportunities for tax benefits
- Kick-off: menu, volunteers, event plan, budget.
- Fourth quarter collections/thank you letter to all paying donors confirming pledge and confirming amount paid.

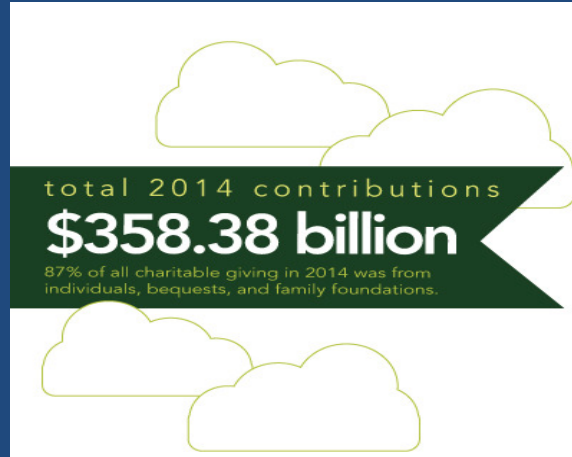
## SAMPLE YEAR ROUND CALENDAR FOR FALL

### December:

- Assessment--use measurable goals. What worked? What didn't?
- Year-End letter and brochure sent to all donors and donor prospects (members).
- Collect all planning information, organize for next year



# The Episcopal Church Foundation



## Why do They Give?

### **Traditionalists: born before 1946**

- Faith in institutions
- Motivated by duty
- Think in terms of legacy

### **New Philanthropists: born 1946 or later**

- Distrust of institutions
- Motivated by impact
- Think in terms of results

# The Episcopal Church Foundation

## ECF's Mission in Partnership

- Bomb-proof
- Available on request, not part of your fundraising
- Reflective of your mission
  
- Great resource: *Not Your Parents' Offering Plate* by Clif Christopher



# The Episcopal Church Foundation

## A Mission Based Budget

- List your ministries
- Appoint a team
- Elaborate on these ministries
- Arrange your ministries into a narrative
- Distribute and communicate these ministries
- Engage with the congregation.
- Remind the congregation of the continuing ministries





# The Episcopal Church Foundation

## Get Personal

- You have weekly personal contact
- Address your vision weekly
- Why ask when you can thank?\*
- 52% of all donors ranked “friends asking for money” as most effective.”



**ecc** EPISCOPAL CHURCH FOUNDATION  
 empowering congregations

# The Episcopal Church Foundation

Get ONLINE

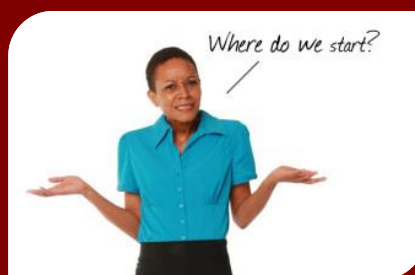
- You can't afford not to
- *Only* method for under-forty demographic
- Point-of-entry for newcomers & unchurched
- Stabilizes giving during vacations & for highly mobile congregations



# The Episcopal Church Foundation

Get ONLINE

- Focus on user experience, *not* fees
- Form a committee
- Involve potential users
- “Start” is better than “perfect.”



# The Episcopal Church Foundation

## Have FUN

When I tell people that I attend St. Paul 's, they always seem a little \_\_\_\_\_ (feeling) at first. When I tell people that I attend St. Paul 's, they always seem a little \_\_\_\_\_ (feeling) at first.

"That \_\_\_\_\_ (adjective) church on the corner of 16th St. and 14th Ave?" they ask.

"What 's that place like?" I \_\_\_\_\_ (adverb) tell them that St. Paul 's is a really \_\_\_\_\_ (adjective) church and that the people are \_\_\_\_\_ (adjective), too. Even the priests and staff are \_\_\_\_\_ (adjective).

When I explain what I like best about St. Paul 's, I mention the \_\_\_\_\_ (noun) and the \_\_\_\_\_ (noun). That 's what makes it such a \_\_\_\_\_ (adjective) place for me and \_\_\_\_\_ (noun).

"\_\_\_\_\_! (exclamation), it sounds like a \_\_\_\_\_ (adjective) church," they exclaim, "What does it take to make it all happen?"

## Don't let it happen here!

A "shocking documentary" by the St. Mark's Sundance Company about life under continuing indebtedness. Written by Ellie & Calvin Dunham; produced by Ellie Dunham, Andrew Dorn, Javier Valdivia, Elizabeth Molitors, Calvin Dunham, and St. Mark's Episcopal Church.

See anybody you know? Is your name on "The List"? Click [here](#) to view, and don't let it happen here.



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www.markducoit.co.uk

### **Don't Let It Happen Here**

**Directed, Filmed and Edited by:** Calvin Dunham

**Rector, Violinist, Host:** Fr. George Smith

**Bouncer Acolytes:** Matthew Buchanan, Elliott Reed

**Hostess:** Julia Dorn

**Mischiefous Girl:** Lina Benich

**Jennifer Dorn:** As Herself

**Andrew Dorn:** As Himself

**Lane Reed:** As Himself

**Vestry Ladies:** Adrian Buchanan, Joyce Fletcher

**Pushy Usher:** Joyce Fletcher

**The Band:** Trey Buchanan, David Fletcher, Chad Alcorn

**Passersby:** Duncan Buchanan, Lina Benich

**Boom Operators:** Douglas Buchanan, Ellie Dunham

**Extras:** The Lanzillos, the Reeds, the Dorns, the Buchanans, Lynn Wollstadt, Jocelyn Briones, and an entire congregation of parishioners!

Special thanks to the 109 members of St. Mark's who have already taken action and pledged.

# Questions?

# Next Steps

- 1.) Determine leadership needed/job descriptions/recruit
- 2.) Check out Project Resource for additional templates
- 3.) Establish year-round calendar for annual giving
- 4.) Keep records of your planning for future leadership

**CHANGE CAN BE GOOD**

“The [new] system has met with unrivalled success because of its flexibility, accommodating itself to the diversified wants of the various congregations.”



*How to Pay Church Debts and How to Keep Churches Out of Debt  
– The Rev Sylvanus Stall, 1881*

# The Episcopal Church Foundation

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