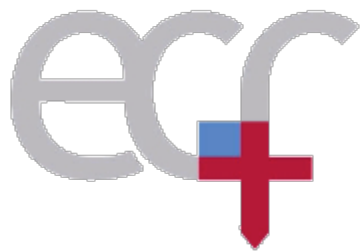




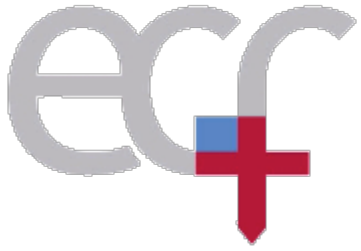
STEWARDSHIP IN THE NEW MILLENNIUM

September 17, 2014

Erin Weber-Johnson, Consultant

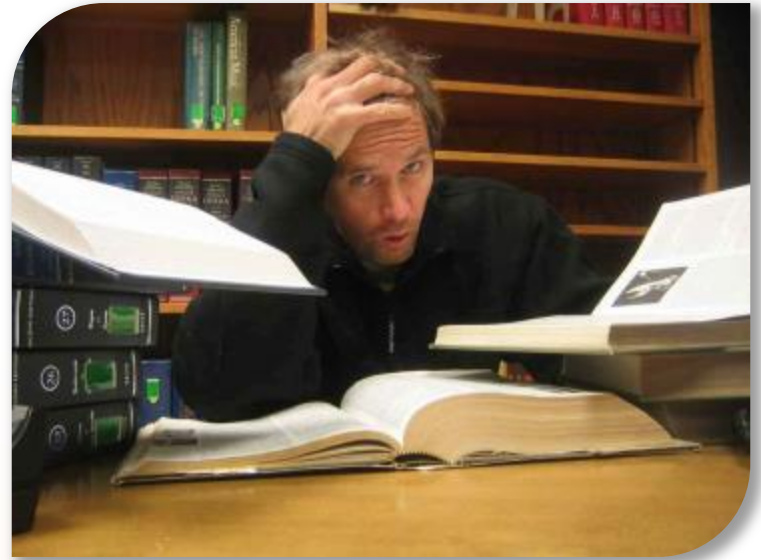


Strengthens the leadership and financial capabilities of Episcopal congregations, dioceses and communities of faith to pursue their mission and ministry



What We'll Cover

- The various kinds of givers
- Changes in giving trends
- How to reach different ages & commitment levels
- The roles of gratitude and fun





Different Types of Giving

Annual

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

Capital

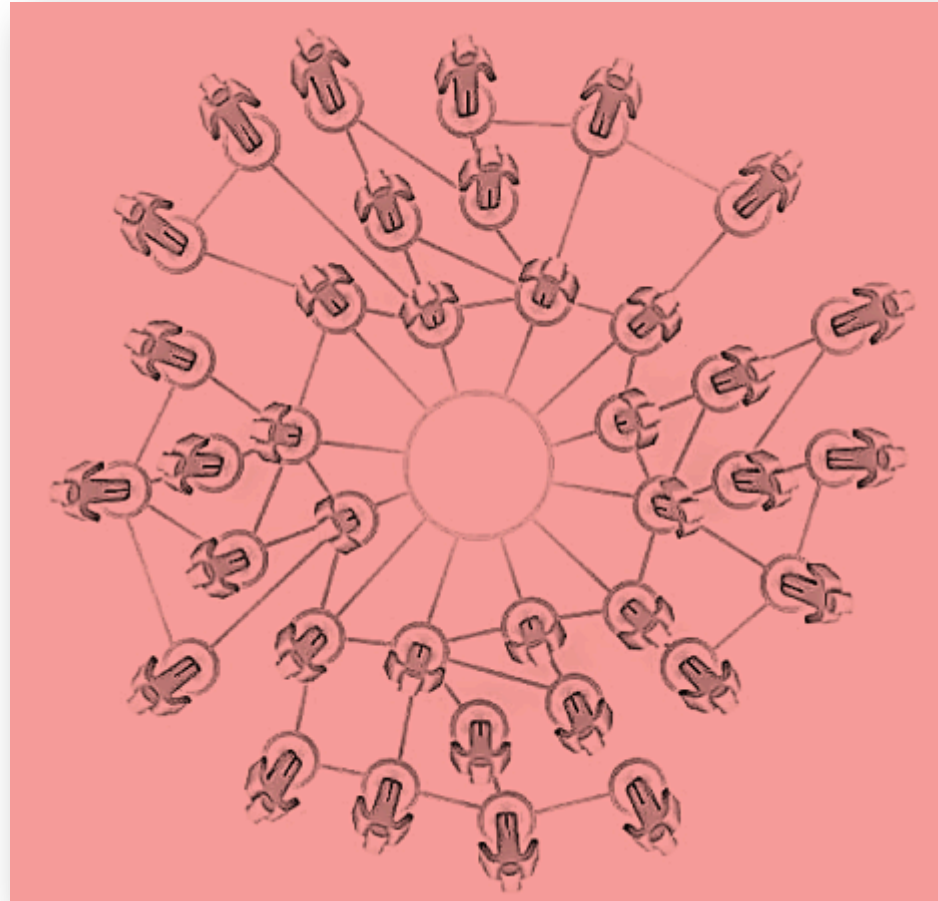
- Funds specific projects, often related to building
- Donor gives from assets
- Tied to future/growth of your mission

Planned

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



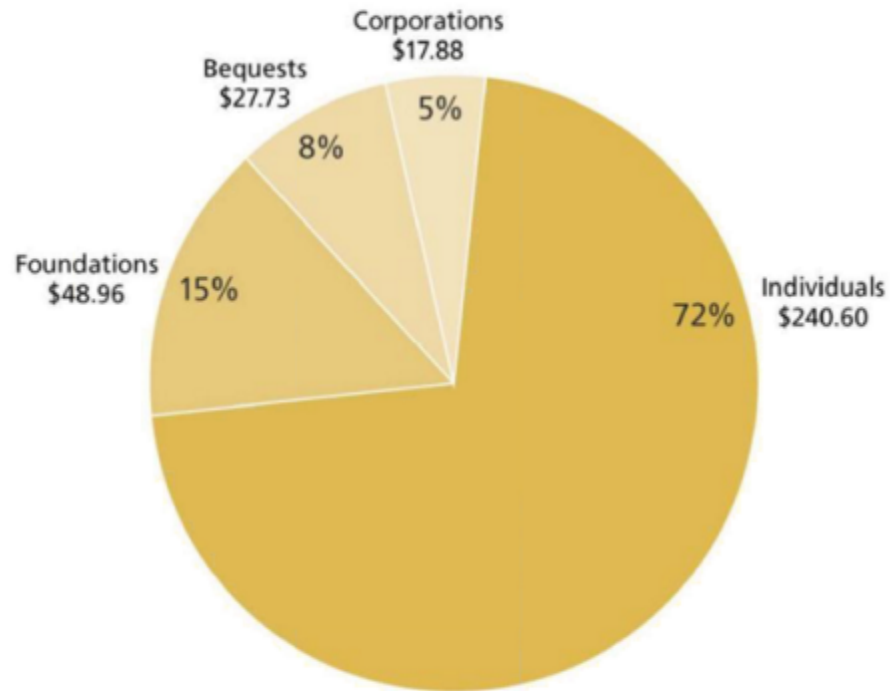
Stewardship v. Giving





Who Gives?

2013 contributions: \$335.17 billion by source of contributions
(in billions of dollars; all figures are rounded)

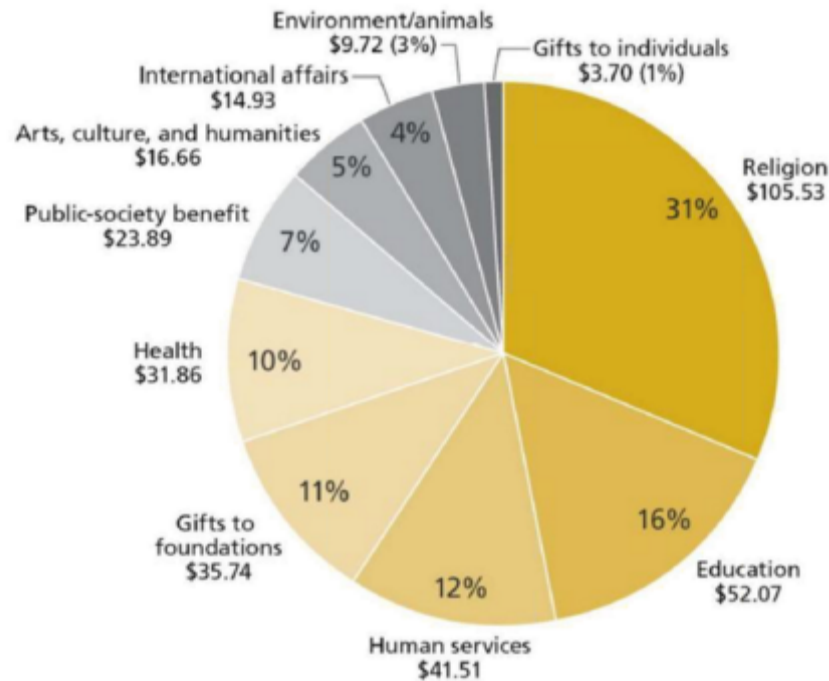


Source: Giving USA



Where do They Give?

2013 contributions: \$335.17 billion by type of recipient organization
(in billions of dollars; all figures are rounded)



Source: Giving USA



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



Where Did the Money Go?





Where Did the Money Go?

- Public-society benefit, up 3%





Where Did the Money Go?

- Public-society benefit, up 3%
- International aid, up 6.9%

**SHE HAS THE POWER
TO CHANGE HER WORLD.**

**YOU HAVE THE POWER
TO HELP HER DO IT.**

Find out how CARE is working
with women to fight poverty,
and what you can do to help. [START HERE ▶](#)

[More ways you can get involved ▶](#)

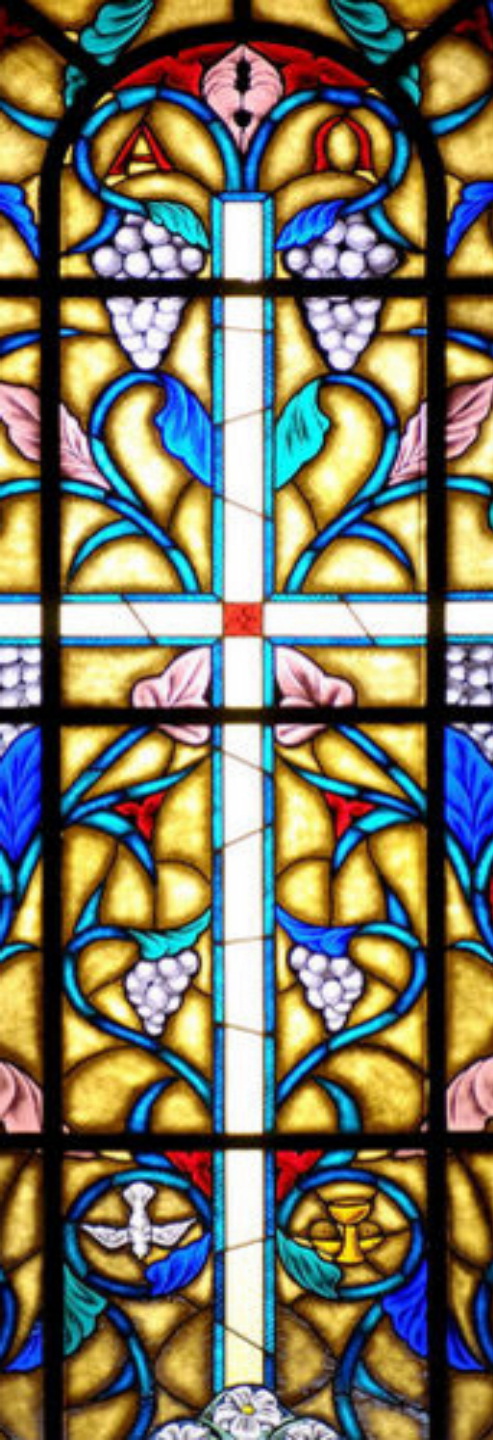
I AM POWERFUL



Where Did the Money Go?

- Public-society benefit, up 3%
- International aid, up 6.9%
- Health, up 4.6%





The Good News, Literally

Money Follows Mission:

- Biblical imperatives widely accepted
- 33% increase in nonprofits in a decade
- They have much to teach us



Who are your Committed?

AND WHAT DO THEY NEED?

- Greatest Generation
- Baby Boomers
- Generation X
- Millennial





The Greatest Generation

Born before 1930

- Defined by Great Depression, WWII, Patriotism
- Loyal to the Church, Strong sense of obedience
- Trust government and authority
- Often make the “converted” group



Subset of TGG: The Silent Generation

Born between 1930-1945



- Defined by Cold War, rising prosperity, a willingness to sacrifice,
- Value loyalty, conformity,
- Married early/ Set up the Church, as we know it
- **MESSAGE:** Legacy (You built this!)
- **STRATEGY:** Most are converted- visit from authority figure



The Baby Boomer Generation

Born between 1946-1964



- Defined by idealism and freedom of 1960's
- Highest divorce rate and 2nd marriages in history.
- Reject establishment and routines
- Self is more important than the group
- Need information on impact/how gift will be used
- Must have transparency in light of mistrust of institutions

The Baby Boomer Generation

Born between 1946-1964



“The American Dream” was promised to them as children and they pursue it.

- **MESSAGE:** Prioritization of Charitable Giving
- **STRATEGY:** Narrative budget, lose language of obligation, Impactful story telling. Have *ACTUAL* recipients of giving speak, Appeal to their idealism
Could your parish be where they spend their “third age?”



Generation X

Born between 1965-1978

- Will move or transition jobs 5+ times
- Wish to “experience” Church, though may not attend regularly



Generation X

Born between 1965-1978

Experience tied to giving

MESSAGE: We are a people/
community who care about each
other. Put individuals in front of
ministries

STRATEGY: Year round thinking on
giving/don't just focus on the fall,
allow them to work independently for
your agency and o their own terms-



The Millennial Generational

Born between 1979/80-2000



- Defined by being children of divorce, celebrate diversity, socially conscious, Digital Media, child focused world, school shootings, terrorist attacks, AIDS, 9/11 terrorist attacks.
- Parents are advocates and friends
- Givens: DEBT! And technology
- Pew research claims giving characteristics are similar to greatest generation

The Millennial Generational

Born between 1979/80-2000



-First generation of children with schedules.

-Require mentorships/relationships to affirm decisions

MESSAGE: Your gift is important and will impact lives. Now, how can we get to know you?

STRATEGY: Mentor relationship initiatives, immediate gratification of giving, online community presence, and online stories of impact.



The Millennial Generational

Born between 1979/80-2000



STRATEGY:

- Immediate gratification of giving,
 - online community presence
 - online stories of impact.
 - Use them for focus groups, ask their opinions.
 - Put them in charge of using technologies for appeals-no long appeal letters
 - Utiliize their networks-have them plan events that interest them.
- * “Mid Century Modern” is cool again.





Targeted Formation

- Lose the 100% mentality
- Identify growth potential
- Determine who are those “committed” in your parish?



Different Vehicles for Different Donors

Baby Boomer

- Prioritization of charitable gifts
- Investment: where does \$1 go?
- In person stories of impact
- Spotlight, third age

Generation X

- Look for ways to tie time with giving (distrust of institutions)
- Lose language of obligation
- Utilize moments of thanks throughout the year for education—will be skeptical of fall drives
- Independence

Millennial

- Act quickly, ask for opinion
- Online stories of impact
- Online **community** presence
- Used to giving of time, provide feedback for giving immediately

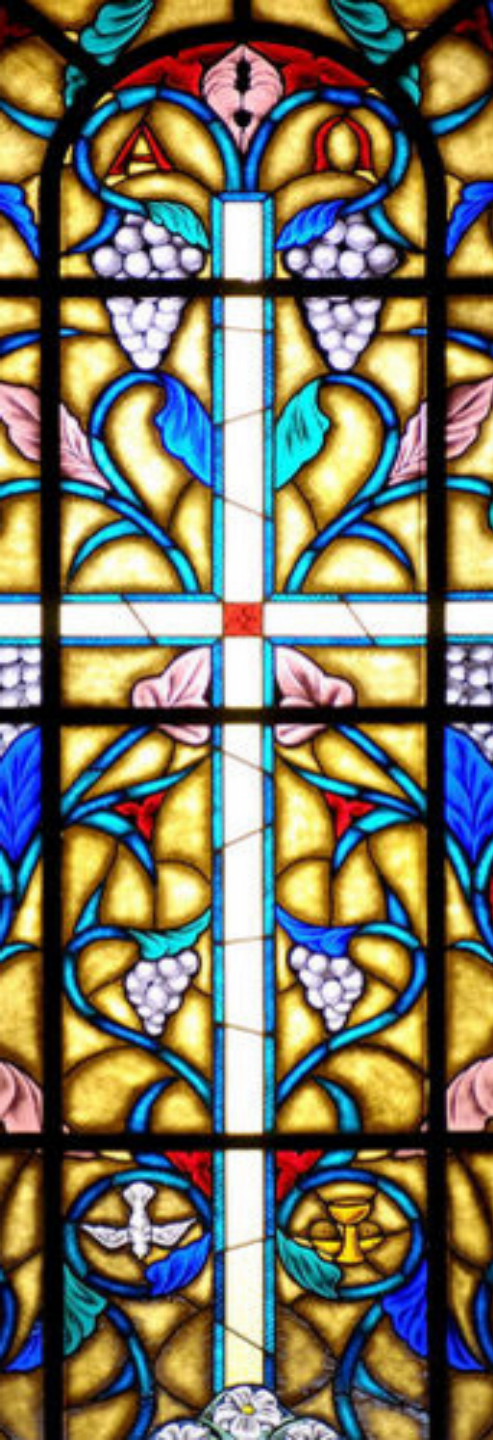


The Role of Gratitude

Your thanks should be:

- Timely
- Personal
- Done in a way that evokes your mission





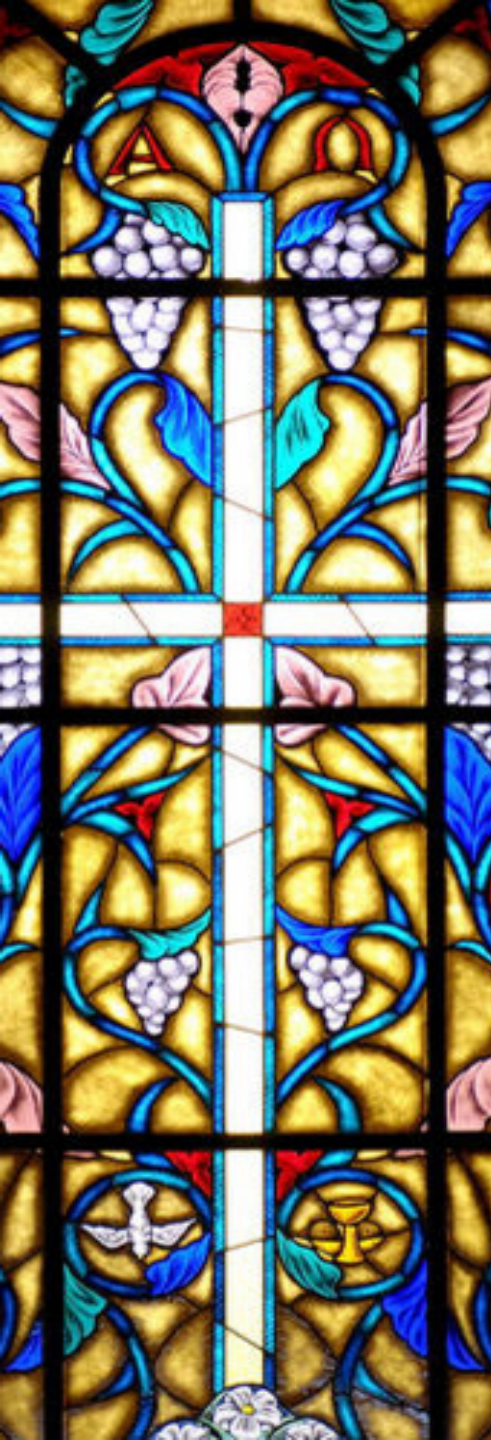
Money Follows Mission

The Three Top Reasons People Give:*

- Belief in the cause
- Respect for staff leadership
- Fiscal responsibility

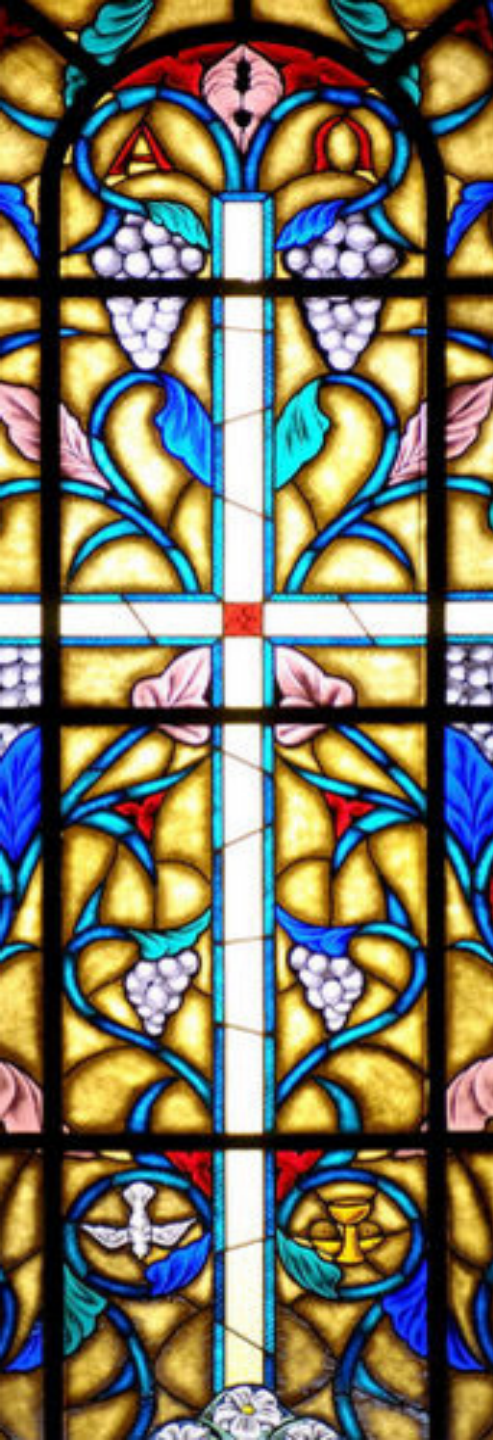
*from *Mega Gifts* by Jerold Panas





Money Follows Mission





So Why Can't My Daughter Give World Peace?





Stories Communicate Impact

- Ask your newcomers
- Repeat the stories
- Attach to your mission

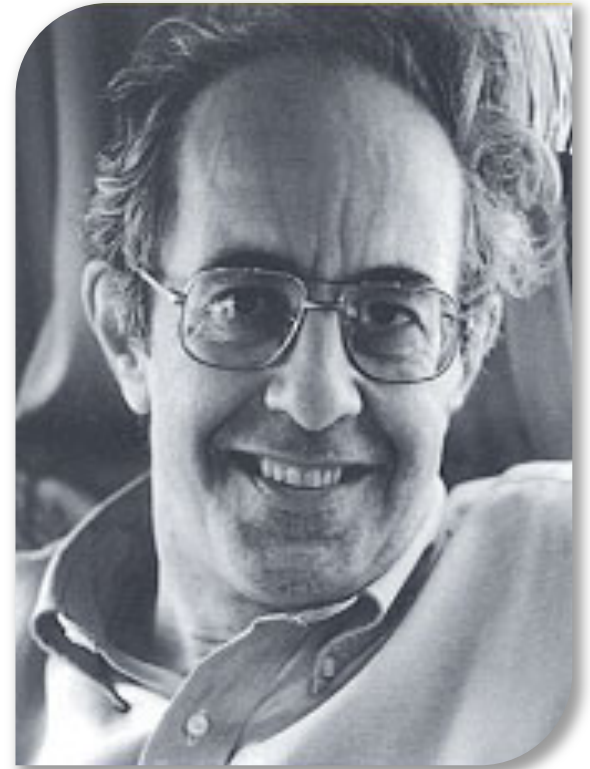


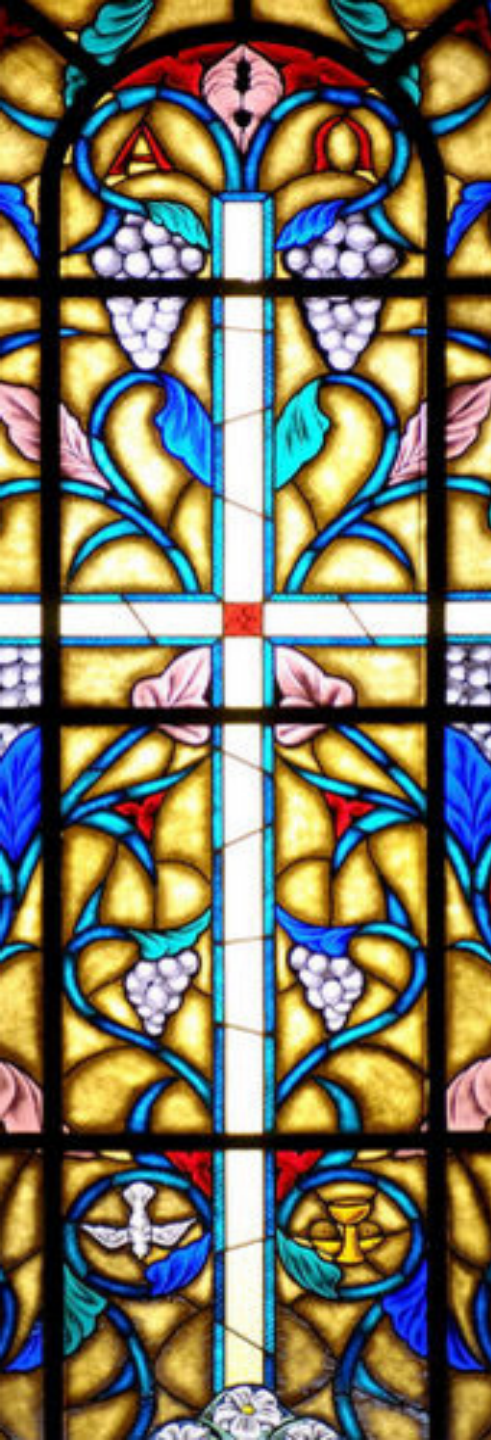


Henri Nouwen

“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





**“Whoever is not against us is
for us.”**

Mark 9.40





Make Your Budget:

- Bomb-proof
- Available on request, not part of your fundraising
- Reflective of your mission

Great resource: *Not Your Parents' Offering Plate* by Clif Christopher





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





Total for core ministries at full strength: \$558,450

Worship \$229,950

More than anything we do, our life of worship unites our many gifts, whether we bring a beautiful voice to the choir or a silent prayer to the altar. How many of us recall entering St. James for the first time,

experiencing the beautiful worship service, and feeling *this is home*? If we focus our stewardship giving on our three core ministries, then 41 cents of every pledge dollar could support worship.

Faith Formation \$120,450

From a child's first day of Sunday School to Adult Formation's exploration of death and dying, the formation offerings at St. James guide each of us as we live into our gifts. As we commit ourselves to the future of

the church, so we commit to increased formation for children and youth. In this scenario, 22 cents of each pledge dollar could support formation activities at St. James.

Social Justice, Outreach, and Diocesan Pledge \$208,050

Whether service grows from faith or our faith is fed by service, St. James' commitment to social justice and outreach makes us a beacon in downtown Chicago. From feeding the hungry to protecting Chicago's children to inspiring the harried with neighborhood music, 37 cents of

every dollar pledged to St. James could support our presence in the wider community. Through our support of the diocese, St. James also helps to sustain other Episcopal congregations throughout Chicago, giving us a presence far beyond our own walls.

And the rest of it?

Our core ministries make up roughly half of our total operating budget. The other half (administrative expenses, buildings and grounds, and other ministries) can be

supported by other sources of income, such as a responsible draw on our investments, wedding fees, plate offerings, and our annual stewardship benefit.



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.”





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





Get Online:

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





Remember to 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?"

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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.

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

Mischievous 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

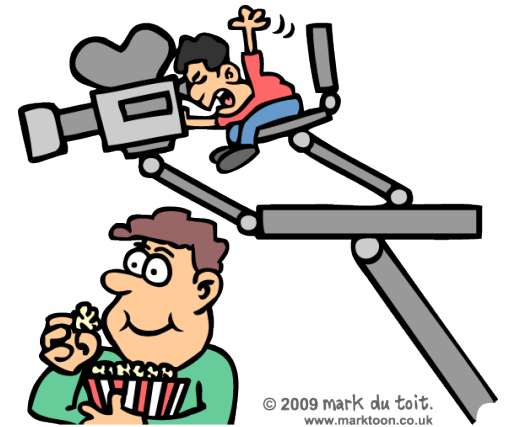
The Band: Trey Buchanan, David Fletcher, Chad Alcorn

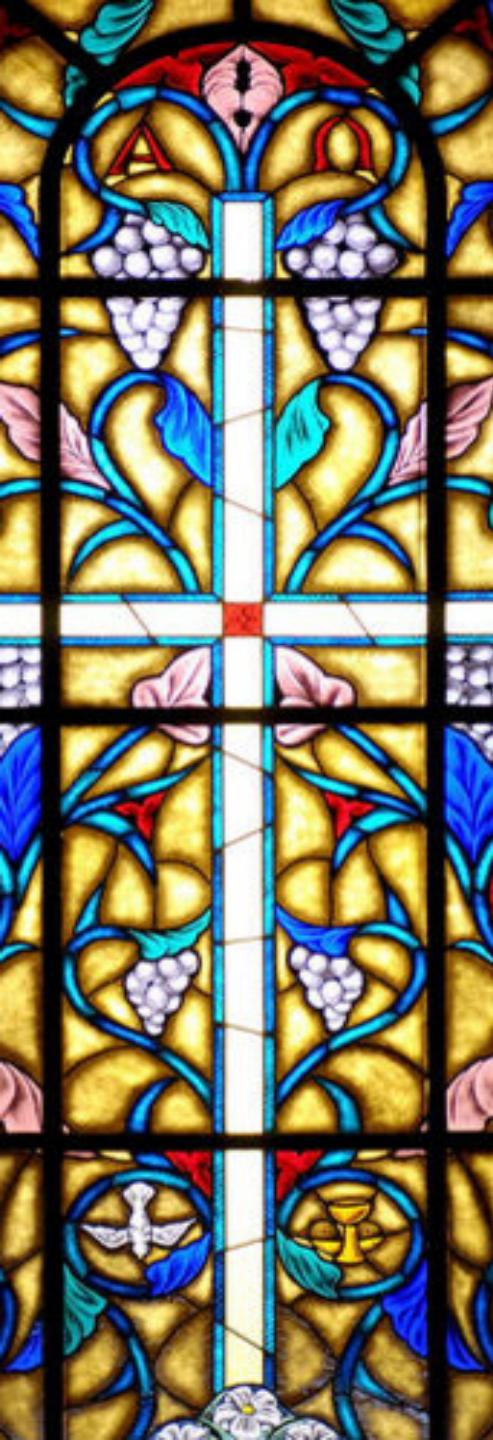
Passersby: Duncan Buchanan, Lina Benich

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.





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.”



Change can be good



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



Questions?

- Terri Mathes:
tmathes@episcopalfoundation.org
- Louise Baietto:
lbaietto@episcopalfoundation.org
- Or call: (800) 697- 2858





Upcoming Webinars

- Vestries: The Next Six Months
Sept. 23rd, 7-8pm EDT
- Vital Teams: What do vital leadership teams do?
Sept. 15th, 7-8pm EDT
- Integrating Annual, Capital, & Planned Giving
Oct. 1st, 7-8pm EDT
- For a complete listing, visit
www.episcopalfoundation.org/events