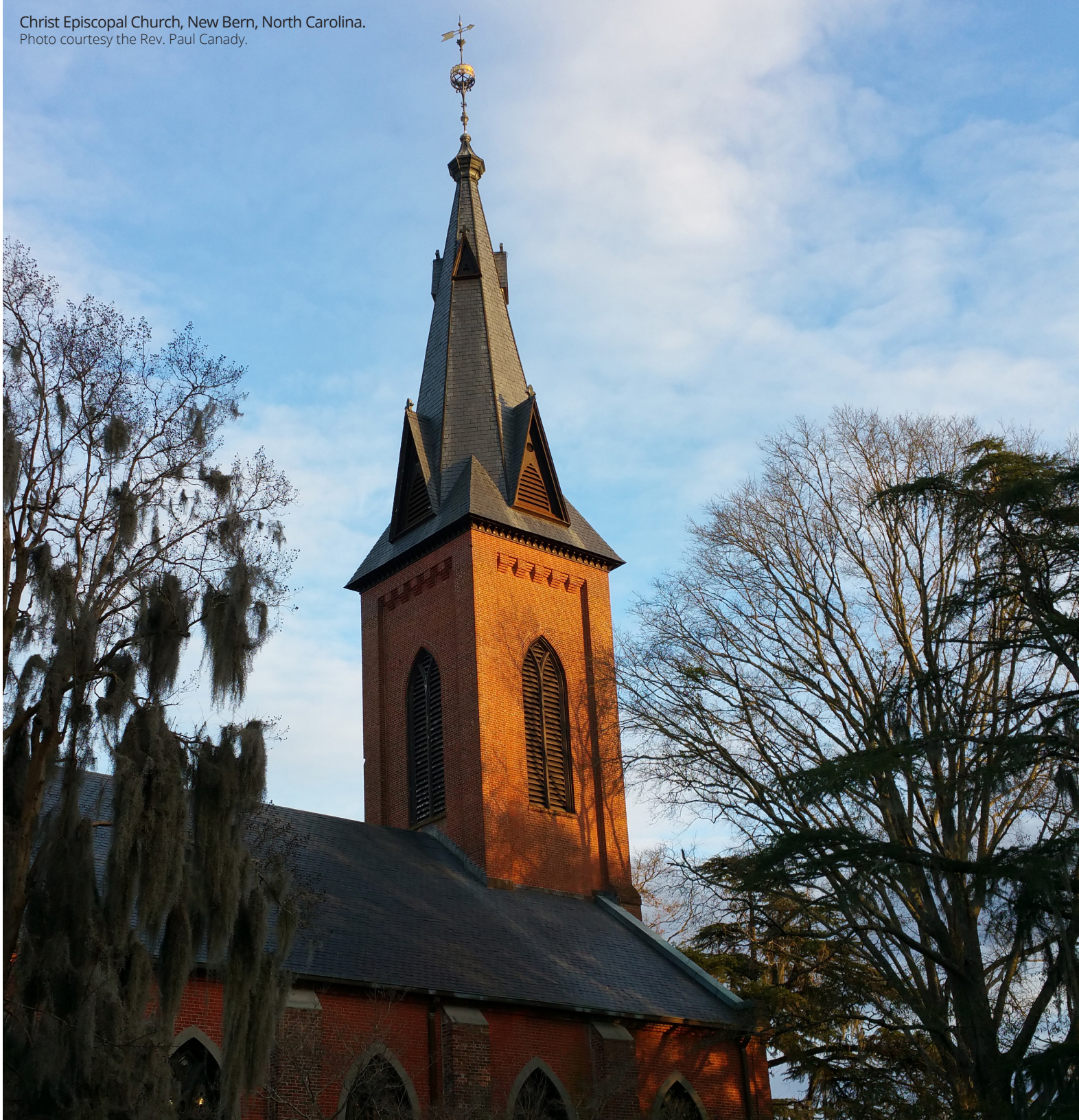


Christ Episcopal Church, New Bern, North Carolina.
Photo courtesy the Rev. Paul Canady.



PROJECT RESOURCE

TRAINING SPONSORS



Annual Giving

The Why

Notes:

Root the Annual Fundraising Calendar 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.”

A Spirituality of Fundraising
— Henri Nouwen

Different Types of Giving

Annual

- Annual giving funds operations
- Donor gives from cash flow to fund daily mission & ministry

Capital

- Capital campaigns fund specific projects, often related to building
- Donor gives from assets to build future/growth of mission

Planned

- Planned giving supports ongoing mission
- Donor gives from estate to continue church mission

Annual Giving

The Why



Change Can Be Good

“The [new] system has met with unrivaled 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 Scarcity Narrative...

- “We don’t have enough volunteers, ever.”
- “Our parishioners are on limited incomes.”
- “Our parishioners are elderly or disabled or just tired.”

Change the Narrative...

Keeping our eyes on the *Whys*.

Everyone in this congregation believes in the *Why* we have articulated — so everyone should be part of how we accomplish that. Invite everyone into the process.

We are shifting from *How* much can you give to *Why* do you give. Does that change your priorities at all?

What gives you joy in this congregation? How can you use that joy to support it?

Notes:

Annual Giving Change

Notes:

Getting Started

1. Choose a Leader
2. Listen & Plan
3. Develop a Theme
4. Plan a Communications Strategy

Annual Giving

1. Choose a Leader

1. Choose a Leader

Notes:

Presenting: Your Annual Giving Chair!

Your Annual Giving Volunteer is a Cheerleader!

- They keep the why top of mind.
- They are also grateful.
- They may be asked to help you identify the impact statements.
- They are organized (they will be riding herd on the communications calendar).
- They are computer literate.
- They are willing to throw a party.
- They will work with a partner.

Sample Job Description

Stewardship Committee

Stewardship Committee Member

Stewardship Mission at Christ Church

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 considering planned giving options.

Membership and Time Commitment

- The stewardship committee shall be comprised of members of the parish. At the discretion of the stewardship chair and rector, more committee members may be recruited and more volunteers enlisted. The executive committee, rector, and parish administrator will be ex-officio members.
- The stewardship chair serves 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, and should be prepared to meet at least once a month, May through January, and as needed February through April, and be accountable 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 Christ Church.
- 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 persistent, optimistic, organized, patient, creative, and willing to share their faith with others.

Responsibilities of the Stewardship Committee

Ongoing Stewardship Ministry

- Stewardship Formation – Cultivate a prayerful and spiritual approach to stewardship, identifying it as a way of life in the parish. Messages in the Sunday bulletin, eNewsletter, prayers, monthly newsletter, homilies, parish website, social media, education programs, and brochures to be mailed or made available in gathering areas.
- Children, Youth, and New Member Stewardship – Encourage a stewardship curriculum 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 for all parishioners to share their time and talent with the parish and community; prepare a time-and-talent brochure of parish activities and organizations. Keep the brochure current.
- Events – Organize annual events such as a Ministry Fair, Annual Meeting, and Service Sunday to demonstrate the impact of parishioner's contributions, showcase parish ministries, and encourage parishioners to share by giving time, talent, and treasure.

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 note 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 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; assemble bulk mailings; manage volunteers in stewardship efforts; and make personal asks of donors.

Annual Giving

2. Listen & Plan

Notes:

Annual Giving Is a Conversation

First there is listening...

- As many ways as you can.
- As many people as you can.
- As often as you can.

Then there is reporting back...

- As often as you can.
- In as many various ways as you can.

Data Gathering & Reporting

Invite your congregation into conversations

- Pew Cards
- Gatherings (actual and/or virtual)
- Social Media
- Written, Spoken, Art, Music...
- Where do you hear it? Success is contextual

Segment your congregation

- Segment based on demographics, needs, and who you have identified yourselves to be and what your unique needs are

Annual Giving

3. Develop a Theme

Discerning Campaign Theme

- Ask questions. Schedule coffees, focus groups, brainstorming sessions, crockpot conversations, etc.
- Listen to people talk about your church's ministry, mission, and impact.
- Pray about the ability to hear a call to a theme. Look for a quote from a hymn, a song, an ad, a Ministry Moment speaker, etc.
- Look at your life together right now. What is about to happen and how do you want that happening to be funded? What do you want to be known for in the community? Look for the vision.
- Discuss why you exist and why that existence should be funded. How does this intersect with what Jesus asks us to accomplish? (God's Mission)

"We do a great job at_____."

"We can accomplish this thing that other area non-profits cannot do."

Notes:

Annual Giving

3. Develop a Theme

Notes:



Your Campaign Theme

- What was your best theme that you've used?
- Why was it successful?

Annual Giving

3. Develop a Theme

Choose a Campaign Theme

Keep it simple and to one message

- Out of Exile
- Leap of Faith
- Love. Care. Give.
- More Than Enough
- Shining Christ's Light. Sharing Christ's Love. Making God's Love Visible.
- ThanksLiving: An Attitude of Gratitude
- Made in God's Image
- Embracing Joy
- Loving Without Limits
- A Journey of Generosity
- GIFT: Growing in Faith Together
- Living Generously
- Strengthening Our Spiritual Home
- Grateful Giving
- Our Whole Heart
- Expanding Branches and Deepening Roots
- Together....As One
- The Great Invitation
- Inspired to Share
- Growing in Generosity
- Walking the Way

Notes:

Annual Giving

3. Develop a Theme

Notes:

Focus Groups of Donors

Involve donors before asking them to invest through philanthropy. Focus group conversations like the one below are a way to understand this work.

1. What is Christ Church doing that inspires your giving of money to fund the mission in 2019?
2. What three or four things affect the lives of parishioners through the church's ministry?

For example:

Hospital visits with communion.

Liturgy and music provide inspiration and strength during a difficult time.

3. What three or four things affect the lives of non-members through the mission and resources of Christ Church?

For example:

A homeless woman will receive good food, kindness, and a bed on Monday nights at the church.

An abused person can speak to a priest and be connected to a shelter for abused spouses.

4. What one word or phrase conveys aspects of the mission of our church?

Annual Giving

3. Develop a Theme

5. What phrase or slogan might work for a stewardship campaign? It needs to convey both the internal conversion of giving and the external need for financial resources. Ex: "The heart of the city, the heart of God," The Community of Jerusalem, a community of monks.
6. If a friend asks you why you pledge to Christ Church, what would you say?
7. If you were to use a photo on the website of the stewardship campaign to convey the power of what your church accomplishes in human lives, what image would you use?
8. When have you met Christ in a member of the clergy, staff, or congregation? Describe that encounter.
9. Why do you give money to Christ Church?
10. What would you say to a congregant who was trying to decide if they could increase their pledge, but were aware that the decision would mean decreasing a gift to another nonprofit?
11. What do we do at Christ Church that would thrill Jesus?
12. What does the Stewardship Committee need to know that it might not know?

Notes:

Annual Giving

4. Plan a Communications Strategy

Notes:

Voice

Tell your story through the theme lens. Consider using:

- 3rd-person narrative. (example: John & Nancy..., Sarah...,)
- the voice of a child thanking the parish for their future spiritual home.
- a collection of first-person narratives from parishioners.

Response

- Mailing Lists...are they clean?
- Would having a postage paid return envelope make it easier for them to return?
- Is Online Pledging an option? Is it easy to navigate?
- Post-COVID, do you have different audiences? (ie Online/Virtual Church Community vs In-Person Church Community)
- Do your communications platforms need to change in a post-COVID world?

Quality

- Excellence is important!
- Would you be inspired to make a donation by a campaign that is poorly thought out and communicated?

Annual Giving

4. Plan a Communications Strategy

Communications Channels

How will you use your design and content in other areas of communication?

- Website: INVEST in your website. Build in capabilities to allow interaction. More people will look through your website than will read your brochure.
- eNewsletters
- Bulletins
- Sermons
- Verbal announcements
- Videos
- Social media
- Potty posters
- Postcards
- Posters
- Banners
- Ministry Moments
- Texting
- Zoom

Notes:

Annual Giving

4. Plan a Communications Strategy

Notes:

Pledge Cards & Online Pledging

Pledge cards are an important part of your communications for a stewardship campaign.

- Be clear.
- Be concise.
- Keep it to one page or less.
- Personalize if possible. If sending via mail, do a mail merge to form fields to fill in the information on file that you already have for them. No one wants to fill out their address for you *again*.
- Use the pledge card to collect additional information beyond their address which you already have, and the financial commitment you are seeking. Don't make it a survey, but do collect email addresses and cell phone numbers if you don't have them; and consider a small number of boxes that members can check for things like:
 - I am interested in including the church in my will and/or estate planning. Please contact me.
 - Please save on postage and printing by communicating with me by email only whenever possible.
 - I would like to give monthly by credit card or through automatic bank withdrawal. (Make sure you're set up to handle this, of course!)
- This may also be an opportunity to also ask for corrections to information in your database.

Annual Giving

4. Plan a Communications Strategy

Thanks Living...

A FINANCIAL & FAITH COMMITMENT FOR 2023

Christ Church Pledge Certificate

Having prayed about this annual pledge to fund the mission of Christ Church in 2023 and with an attitude of gratitude for all that God has given me/our family, my/our 2023 pledge will be \$ Yearly during the next fiscal year (January 1, 2023, to December 31, 2023).

(I/we realize that in the event of a financial problem in 2023, we can confidentially adjust our pledge by calling the clergy).

Signature(s)

Name(s)

Address

Email

Phone

I/We intend to give: (a weekly pledge is very helpful in our financial planning!)

Weekly Monthly Quarterly Full Amount Yearly

By: Automatic Bank Transfer Credit/Debit Card Offering Plate Giving

I/We are interested in making a separate gift (in addition to the annual support listed above) to a specific project for which funds are needed. Please have the clergy contact me about having this conversation.

I/We are interested in receiving information about planned giving (estate planning, charitable trusts, making a will or living will, etc.) Please contact me/us about this by sending literature which will help to inform my/our planning.

Thank You

FOR YOUR COMMITMENT

You will be sent a letter confirming your pledge in December 2022 and a letter for your tax use reflecting your 2022 contributions in January 2023.

Please send your pledge card to:

Stewardship Campaign
Christ Church
320 Pollock Street
New Bern, NC 28560

You may also pledge online at
ChristChurchNewBern.com/Pledge



CHRIST CHURCH

Annual Giving

4. Plan a Communications Strategy

Notes:

Impact Statement

- Communicates to the stakeholders that their gift has made a difference.
- Gives tangible evidence of that impact.
- Reminds the donor not *of what* they gave, but *why* they gave.
- Connects the dots between their gift and the Why.

Impact Statements: The Difference You Have Made

- We have shared 2,500 cups of coffee together.
- 220 pairs of feet come in and out of our doors each week.
- 30 people every Sunday.
- 20 AA members.
- 25 Wiggle Worms.
- 10 members at Bible Study Thursdays.
- 12 members at Bible Study Fridays.
- 3 Knitting Club members.
- 10 Boy Scouts.

Annual Giving

4. Plan a Communications Strategy

Ministry Moments

A Ministry Moment is a time in each service during your pledge campaign where a parishioner gives a personal testimony on the impact of mission and ministry of the church.

Ministry Moments are case-development and pledge-encouragement activities. This program takes careful planning, curating, coaching, and editing, but the result is tremendous for the health of a church.

How?

Recruit well and early (before the theme design).

- Who is authentic?
- Who fits with your brand?
- Who does what they say they will do?
- What people best represent the mission?

Ask your recruits to write 500-word statements.

- “Why I love this church.”
- Meet with recruits individually to review statements.
- Coach brevity, clarity, and authenticity.
- Coach fearlessness, prayer, prep, and familiarity.
- If recruits are verbose, too theological, or too spiritual, then coach them. Tell them the truth.
- Each statement needs to be under 500 words and must be finalized after a few drafts. Get comfortable with drafts and revisions. Do not settle until it is perfect!
- Meet with the speaker the week prior to their scheduled presentation so they can practice at the podium with your critique.

Thank the speakers after the campaign.

They can be fun:

<https://www.youtube.com/watch?v=7RSWfp7Pbrg&feature=youtu.be>

Notes:

Annual Giving

4. Plan a Communications Strategy

Notes:

Ministering to Ministry Moment Ministers

1. Help to to feel prepared.
2. Give them guard rails.
3. Give them plenty of time to prepare
4. Welcome them and get them settled
5. Walk them through the process
6. Be sure they have water
7. Thank them profusely
8. Ask them what they would have done differently.
9. Thank them again.
10. One more thanks can't hurt.

Annual Giving

4. Plan a Communications Strategy

Team Exercise

- Development of your theme for annual giving
- Begin creation of your year-round calendar

Notes: