

St. Peter's Episcopal Church, Salem, Massachusetts.  
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# PROJECT RESOURCE

TRAINING SPONSORS





# Annual Giving

## 5. Launch and Celebrate

### Notes:

### Sample Annual Giving Calendar

#### January

- Send thank-you letters. The end of last year's annual campaign is marked with careful gift acknowledgement thank-you letters, phone calls, and notes. These thank-yous are simultaneously the last event of the last campaign and the first event of the next campaign.
- Celebrate the stewardship committee and the work they've done from the year previous.

#### February

- Recruit volunteers (*See Week 3 Notes, page 5, for Stewardship Committee Member Sample Job Description*). Inter-generational leadership. Skill-based, not need-based.
  - Vocation or calling: "that place where the world's great need and your deep hunger meet."
- Establish a clear time frame.
- Articulate expectations.

#### March/April

- Open staff and lay leadership input and creative conversation hosting on design, theme, content, and 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.
- Say thank you. 1 year-round thanking opportunity.

# Annual Giving

## 5. Launch and Celebrate

### May

- Write and publish an article on how the last campaign went. What went well? What was funded? Why was their gift valuable to mission? Introduce the next campaign.
- Send first-quarter collections/thank-you letter to all donors confirming their pledge, the amount paid, and the amount still due (note: all collections correspondence is thank-you correspondence, except it includes pledge payment status. These letters end when the pledge is fully paid).
- Produce case materials.
- Say thank you. 1 year-round thanking opportunity.
- Brainstorm possible Ministry Moment speakers. Develop list and then refine for recruitment.

### June/July

- Recruit Ministry Moment speakers.
- Plan campaign kick-off: menu, volunteers, event plan, budget, and leader.
- Plan campaign ending dinner: menu, volunteers, event plan, budget, and leader.
- Draft second-quarter collections/thank-you letter to all paying donors, confirming pledge and amount paid and pending amount due. Paid pledgers receive no letters.
- Say thank you. 1 year-round thanking opportunity.

### August

- Campaign direct mail warm-up letters to all non-advance campaign prospects.
- Continue campaign kick-off plans.
- Send second-quarter collections/thank-you letter to all paying donors, confirming pledge and amount paid and pending due.
- Say thank you. 1 year-round thanking opportunity.

### Notes:

# Annual Giving

## 5. Launch and Celebrate

### Notes:

#### September

- Draft communications: collects, bulletin announcements, and celebrant announcements.
- Send campaign brochure and pledge cards by direct mail.
- Hold stewardship campaign kick-off event!
- Say thank you. 1 year-round thanking opportunity.

#### October

- Schedule Ministry Moments.
- Send third-quarter collections/thank-you letter to all paying donors confirming pledge and amount paid.
- Send thank-you letters 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.

#### November

- Hold celebration event. Mark the end of the campaign!
- Bless pledges with a Pledge Blessing Sunday.
- Send year-end letters: end-of-the-year gift opportunities for tax benefits.
- Send fourth-quarter collections/thank-you letter to all paying donors confirming pledge and amount paid.
- Say thank you. 1 year-round thanking opportunity.

# Annual Giving

## 5. Launch and Celebrate

### December

- Assess your campaign: use measurable goals. What worked? What didn't?
- Send year-end letter and brochure to all donors and donor prospects (members).
- Collect all planning information and organize for next year.
- Say thank you. 1 year-round thanking opportunity.

### Notes:

# Annual Giving

## 6. Thank and Celebrate

### Notes:

### Q: How Many Times?

**Q:** How many times do you say “Thank you” each year?

**A:** 7

### How to Thank

- Small reminder gifts
  - Magnets
  - Mugs
  - Dried flowers
  - Small pictures
  - Candy bars
    - 100 Grand (first 100k in for budget)
    - Peppermint Patties (A/C)
    - Red Hots (heat)

# Annual Giving

## 7. Thank, Thank, & Thank

### Thanking

A tool, an act of appreciation, a year-round act.

#### Why?

- Appreciation
- Source of education about how gifts were used
- Source of education about the institutions
- Source of education about new opportunities to give
- Theological imperative

#### How to?

- Assign a vestry member to a ministry
- Facebook posts with relevant hashtags
- Monthly thank-you texts
- Monthly postcards w/faces
- Pictures (when appropriate) from recipients
- Thank-you events
- Facebook posts with relevant tags
- Highlight major donor giving in the community as “our parishioners”

### Notes:



# Annual Giving

## 8. Plan for Next Year

### Notes:

### Best Strategy for Giving: Plan Before Fall!

- Plan with measurable objectives.
- List dates for completion.
- Name leaders responsible.
- Archive plans for leaders to access year after year.
- Create a calendar.



# Annual Giving

## 8. Plan for Next Year



### This Year's Learnings: Next Year's Strategy

- Record what feedback you received.
- Record donor information (pastoral concerns, needs named, pertinent information).
- Listen to reasons for giving.
- Look to see what strategies worked/what didn't/what could work with adaptation.

### Notes:

# Sample Letters

## Early Invitation from Clergy or Campaign Chair

Dear JOHN,

Made in God's image, we love. Out of our love, we care for others. In order to care for others, we share what we have to fund acts of love at Christ Church and in our city. Our financial gifts are as much an expression of our beliefs as our creed, our life, and our liturgy.

This is an important year for our bold investment into our church's ability to love, care, and give; funding our church for God's mission in our diocese. In YEAR, you generously gave \$\$\$ in support of the ministry that Christ has called us to. This year, I ask you to consider giving \$\$\$\$. You are part of Christ Church, and this church is yours. Thank you for your continued support.

Your acts of loving, caring, and giving are only part of your pledge. Your views and your presence are pledges too. Please note the "Dream Together" conference on Saturday, October 17, and the Campaign Celebration dinner in the Parish Hall on Wednesday, November 18. Your presence and Inspiration are essential to our common life. So please put these dates on your calendar. I look forward to seeing you at church soon.

Warmly and with gratitude,

Rector or Campaign Chair

# Sample Letters

## Hand-Written Invitation from Clergy or Campaign Chair

*Handwritten notes are drafted and mailed to all donors and LYBUNT between the initial warm-up letter and the campaign celebration (September – November). This is one of two handwritten notes donors receive. The second handwritten note is sent after the campaign and after standard gift acknowledgement letters are sent; usually February.*

Dear JOHN and SARAH,

I trust this letter finds you well. You may have already made your pledge to Christ Church, or you may be praying and thinking about your pledge. Regardless, I wanted to write to thank you. Your gift will make ministry and mission happen in many lives. Thank you for the decision you are making about your pledge. I look forward to seeing you on November 18 at our celebration dinner!

Warmly,

Rector or Campaign Chair

# Sample Letters

## Automatic Withdrawal Confirmation Letter

*Sample email to donors giving through auto-withdrawal (bank or card) confirming pledges maintained or increased for YEAR.*

JOHN,

I hope you are enjoying your Christmas preparations!

In YEAR, you generously pledged \$300.00, which has funded extraordinary mission and ministry at Christ Church.

It is our understanding that you want to continue your annual pledge, to be withdrawn from the credit card ending with 2428.

Would you confirm that you wish us to continue deducting your pledge payments from your credit card in YEAR? If you would like to increase your pledge or change it in any way, please let me know.

Thank you for maintaining this pledge to help us reach our goal; and please accept my warmest wishes for a happy Christmas.

Yours sincerely,

Rector or Campaign Chair



# Sample Letters

## Letter to LYBUNT / PYBUNT Donors

### Exit Questionnaire and Engagement Letter

*This letter goes to donors who have pledged in past years or last year but did not pledge in the most recent, ended campaign year. If your campaign runs September through November, then this letter would go out in February after you have tried to recruit their outstanding pledge by letter and personal phone calls. When you are sure they will not pledge, send them a letter like this one to ask why they did not pledge so that you can learn from each donor.*

*It is always best to have these conversations personally. Use this tool to open the possibility of that conversation, or where 1:1 conversation is not possible.*

Dear JOHN and JANE,

In YEAR, you pledged \$300.00 to Christ Church as part of the pledge campaign, and we are grateful. When we approached you during the most recent pledge campaign, however, you chose not to make a pledge to the ministry of Christ Church. That's what our records show in any event. So I am writing to learn more about your decision and to hear from you personally.

Would you be willing to speak with me on the phone? I would like to know more about your decision. Not only would it help us serve you, it might also tell us of changes we need to make to better serve the life of our church.

If you would rather complete a survey, I have enclosed one; it is confidential. Thank you for your pledges in past years, and please know that if you wish to renew a past pledge, you may do that by checking the box, "I wish to pledge" on the enclosed survey and returning it in the enclosed envelope.

Warmly and with gratitude,

Stewardship Chair

# Sample Letters

## Pledge Collections Letter

Dear JOHN and JANE,

Thank you for your pledge of \$300 to Christ Church's annual pledge campaign last fall. We surpassed the previous year's pledge amounts by 2% and are busy doing ministry throughout the church and the city because of your investment in the life of the church and in God's mission.

Our records indicate that

[Letter version one for those who have paid part of their pledge]

"you are kindly still paying this pledge and have paid \$ XXXXXX so far. We are grateful for that payment."

[Letter version two for those who have yet to pay anything on their pledge]

"you have pledged \$XXXXXX, and we look forward to assisting you in any way we can as you pay this pledge throughout the year."

[Letter version three for those who have paid their pledge when the pledge was made or in this first quarter]

"you have kindly paid this pledge in full, for which we are grateful."

If our records do not match yours, please contact me directly or call ADMINISTRATOR NAME.

Your pledge is making a difference in the lives of those who worship at Christ Church, those who come to our church for solace and community, and those who need the help of our community. At Christ Church we baptize and bury, we feed the hungry, we teach, and we heal--all because of this investment you have made.

Thank you and please know how grateful we are for your gift to the Christ Church community.

Warmly,

Stewardship Chair

# Sample Letters

## Financial Support Survey

Dear JOHN and JANE DOE,

At Christ Church, we believe stewardship is a ministry of the heart. To that end, we seek to know more about you to better understand how to further strengthen our work together.

Please fill out the survey and return it with the enclosed envelope. If you prefer to fill out the survey online, please go to [ChristChurch.org/FinancialSupportSurvey](http://ChristChurch.org/FinancialSupportSurvey). If you want to speak in person with STEWARDSHIP CHAIR NAME [provide contact info here] or ADMINISTRATOR NAME [provide contact info here], please let them know by email or phone call.

We are grateful for the gift of your time in filling out this survey. Your information will have an impact on our ministry. Please also feel free to email your survey to STEWARDSHIP CHAIR EMAIL.

- Why did you choose to pledge to the mission of Christ Church in YEAR? (or not)
- What would help you to make a pledge in future years?
- What aspects of our mission and ministry most inspire you when you make a decision about your pledge? By way of contrast, are there aspects of our mission and ministry that do not excite you, or even frustrate you, when you consider making a pledge to the ministry of the church? We want to know what you think.
- Would you please tell us about anything occurring in your life—either at Christ Church or in your personal life—that has affected your ability or willingness to make a pledge? Again, we want to know and to be available to you for conversation.

Printed Name

Signature

# Sample Letters

## LYBUNT End of Year Reminder Letter

### (Last Year But Unfortunately Not This Year)

Dear JOHN and JANE,

Thank you for your generosity to Christ Church. Your pledge to fund the operating budget this year ensures our parish is able to live into its mission and ministry in the world. [can substitute a campaign theme for mission in the world such as “set the table” or “shine a light”]

Our records indicate that you pledged \$300 for the YEAR program year, leaving a balance due of \$200. If we are in error, please help us to make any needed changes by calling ADMINISTRATOR NAME at 777.867.5301.

Or if you would like to discuss your pledge, the use of your pledge in our ministry, or any other aspect of our life together, please call TREASURER at 777.867.5302.

If you are unable to pay your pledge at this time, please let RECTOR know at 777.867.5303 so we can update our records.

Again, thank you for this investment in our mission together.

In gratitude,

Stewardship Chair



# Sample Letters

## SYBUNT End of Year Reminder Letter (Some Year But Unfortunately Not This Year)

Dear JOHN and JANE,

May I ask you for a Christmas gift? Will you make a pledge to the annual campaign this year?

Thank you for your generous pledge of \$300.00 in YEAR. We are close to our goal.

As we wait in Advent for the Christ Child, we are anticipating what we will be able to do as Christ's hands and feet as Christ Church in YEAR. By pledging in past years, you have made that work possible.

Will you fill out this pledge card right now and pop it in the mail? Or you can simply go online to [christchurch.org/pledge](http://christchurch.org/pledge) to make that pledge. If your financial circumstances change at all in YEAR, you can change your pledge by sending me an email. It's easy.

You may be choosing to pledge more. Or you may be continuing your pledge at its current level. But please know that your pledge is essential so that we may establish a fully funded budget at our Annual Meeting in early January.

I have enclosed a pledge card and a return envelope. I will call your home or cell in the next few days just to thank you for your consideration.

If we are in any way in error, we kindly thank you for helping us to make needed changes by calling ADMINISTRATOR NAME at 777.867.5301. If you would like to discuss your pledge, the use of your pledge in our ministry, or any aspect of our life together, please call me at 777.867.5302.

Thank you for this investment in our mission together.

In gratitude,

Stewardship Chair

# SMART Goals

## Notes:

### Setting SMART Fundraising Goals

**Before you get bogged down... Let's talk Goal-Setting!**

S = Specific

M = Measurable

A = Assigned to

R = Realistic

T = Timeframe

Goals answer the question "How?"

### SMART Goal Examples

#### Strong:

- Bob and Mary will plan the campaign end dinner (menu, volunteers, event plan, budget, and leader) by July 1.
- Father Sam will send out personalized thank you letters to all 2022 donors by August 1.

#### Weak:

- Plan the campaign kick-off event.
- Meet with stewardship team.

### Your Turn: Set a SMART Goal

Setting goals to start on the road to success.

# SMART Goals

## Your Turn: SMART Goal Activity

Take five minutes alone to write one to three SMART goals to implement this summer.

S = Specific

M = Measurable

A = Assigned to

R = Realistic

T = Timeframe

Goal for 3 months:

Goal for 6 months:

Goal for 9 months:

## Notes:



### Team Exercise:

1. Set SMART goals together.
2. Update your year-round calendar with additional steps.