



PROJECT + RESOURCE

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COLLEGE *for* BISHOPS

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Week 5 – Meditation, Matthew 22:15-22



The Pharisees went and plotted to entrap Jesus in what he said. So they sent their disciples to him, along with the Herodians, saying, “Teacher, we know that you are sincere, and teach the way of God in accordance with truth, and show deference to no one; for you do not regard people with partiality. Tell us, then, what you think. Is it lawful to pay taxes to the emperor, or not?” But Jesus, aware of their malice, said, “Why are you putting me to the test, you hypocrites? Show me the coin used for the tax.” And they brought him a denarius.

Week 5 – Meditation, Matthew 22:15-22



Then he said to them, “Whose head is this, and whose title?” They answered, “The emperor’s.” Then he said to them, “Give therefore to the emperor the things that are the emperor’s, and to God the things that are God’s.” When they heard this, they were amazed; and they left him and went away.

Week 5 - Project Resource Review



Week 1:

3-Legged Stool of Fundraising:

- Annual Pledge Campaigns
- Major Gifts
- Planned Giving

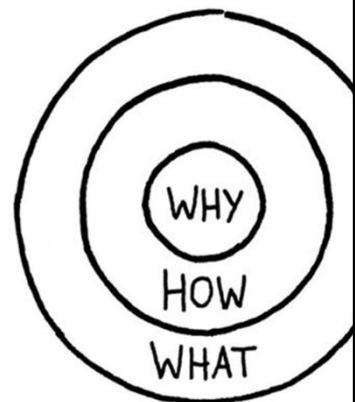
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Week 5 - Project Resource Review



Week 1:

Stewardship as a Contextual Ministry What is the Why?



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W eek 5 - Project Resource Review



W eek 2:
Donor Characteristics = Pastoral Ministry

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W eek 5 - Project Resource Review



W eeks 3 & 4:
Annual Giving

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Week 5 - Project Resource Review



Week 5: Major Donor Giving

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The 5 W's of Major Giving



- What? 🪙
- Who? 👥
- When? 📅
- Where? 📍
- Why? ❤️



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The 5 W 's of M ajor G iving



W hen Do Donors G ive M ajor G ifts? 📅

- Annual Stewardship (and end-of-year gifts)
- Life Event (birth or death, marriage, etc.)
- Capital Campaign
- Planned Gift
- Direct Ask for a Special Project

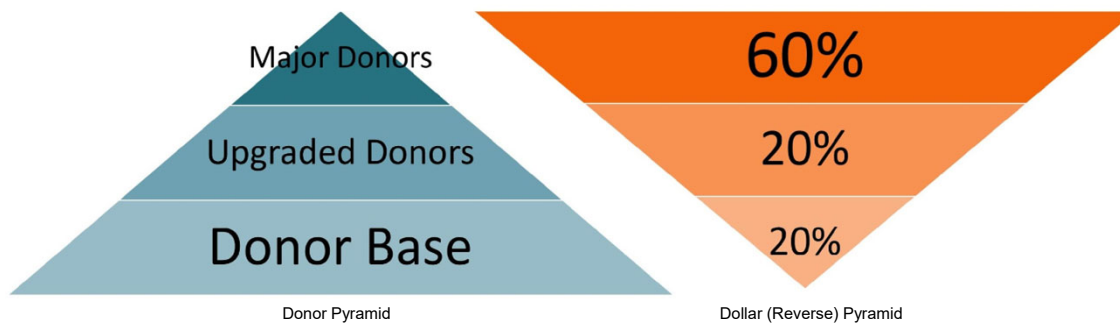
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The 5 W 's of M ajor G iving



W hat is a M ajor G ift (for you)? 🪙

- Hint: It's all relative!



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The 5 W 's of M ajor G iving



W ho gives M ajor G ifts? (Good...)

- Linkage - Is the donor connected to the congregation or faith com m unity?
- Ability - Does the donor have the financial capacity to m ake a large gift?
- Interest - Is the donor interested in the project or program that needs funding?

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The 5 W 's of M ajor G iving

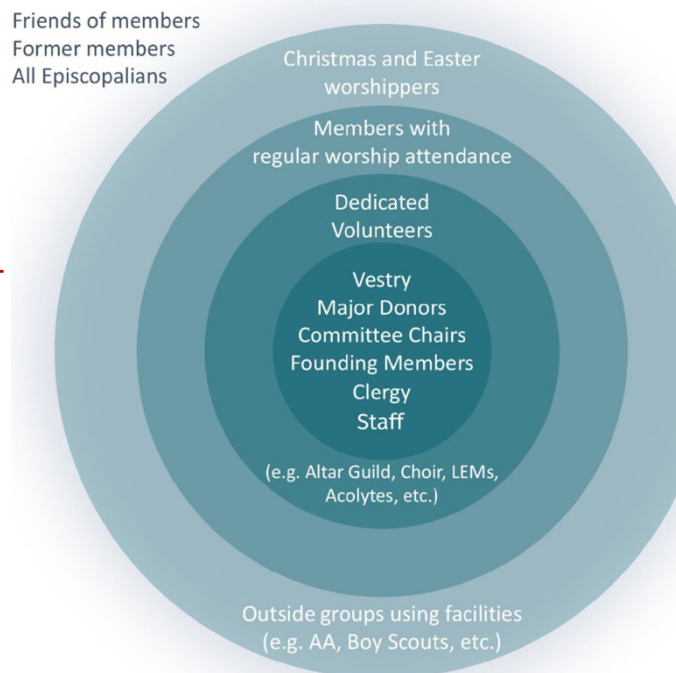


W ho gives M ajor G ifts? (Better!)

- Linkage - How deeply is the donor connected to the congregation or faith com m unity?
- Involvem ent - Is the donor involved in planning and strategy?
- Advocacy - Has the donor been an active voice for the congregation or faith com m unity?

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The Constituency Model



The 5 W 's of Major Giving



The Constituency Model Post-COVID

Post-COVID Considerations

- Your online constituency should be considered here .
- Who has made comments?
- Who has followed up or been very consistent?
- Who has begun to give?
- Who is a surprise?

The 5 W 's of M ajor G iving



W here Do Donors G ive M ajor G ifts?

- Organizations that matter most to them !

The 5 W 's of M ajor G iving



The W heel of Roles & Responsibilities



The 5 W 's of Major Giving



64% \$319.04 billion

Giving by Individuals

↓ declined by 6.4% over 2021

21% \$105.21 billion

Giving by Foundations

↑ increased 2.5% over 2021

9% \$45.60 billion

Giving by Bequest

↑ increased 2.3% over 2021

6% \$21.08 billion

Giving by Corporations

↑ increased 3.4% over 2021



*All figures on this infographic are reported in current dollars unless otherwise noted. Inflation was especially high in 2022, at 8.0%, and results may differ when adjusted for inflation. Learn more in the chapters.

percentage of the total contributions*

↑ 5.2%		\$143.57 billion to Religion	27%
↓ 0.6%		\$71.98 billion to Human Services	14%
↓ 3.6%		\$70.07 billion to Education	13%
↑ 10.1%		\$56.84 billion to Foundations	11%
↑ 5.1%		\$51.08 billion to Health	10%
↓ 8.4%		\$46.86 billion to Public-Society Benefit	9%
↑ 10.9%		\$33.71 billion to International Affairs	6%
↑ 2.9%		\$24.67 billion to Arts, Culture, and Humanities	5%
↓ 1.6%		\$16.10 billion to Environment/Animals	3%
↑ 0.6%		\$12.98 billion to Individuals	2%

— change in comparison to total raised in 2021

*Percentages for recipient categories do not include unallocated giving, which totaled -\$28.54 billion in 2022.



The 5 W 's of M ajor G iving



Research

Giving USA :W here donors give gifts

<https://givingusa.org/giving-usa-limited-data-tableau-visualization/>

Episcopal Church Community Profile :dem ographics & giving trends

<https://www.episcopalchurch.org/research-and-statistics/>

Collective Foundation

<https://collectivefildn.org/report>

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The 5 W 's of M ajor G iving



W hy Do Donors G ive M ajor G ifts? ❤️

Top Three Reasons:

1. Being asked by someone you know well.
2. Because you volunteered at the organization.
3. Being asked by clergy to give.

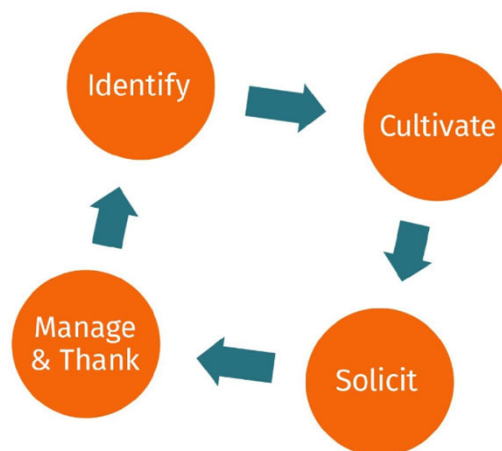
Source: Independent Sector

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The 5 W 's of Major Giving



How ?



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How to Make the Ask in 8 Steps



1. Prayer 🙏
2. Identification/Qualification 🔍 👁
3. Development of a Strategy and Timetable 📅
4. Cultivation 💬
5. Solicitation and Negotiation 🤝
6. Acknowledgement and Follow-up 📧
7. Administration 📞
8. Renewal 🔄

The 8-Step Process: Step 1



Prayer

Holy God,
 There was Eden, and then there was east of Eden;
 Which is all to say— this world is not what you intended it to be.
 You planted a garden and dream ed of Sabbath— and it was good .
 It was so very good .
 However, when we look around today, we know that we have lost our way.
 So today we bring our hearts, m inds, and m oney back to you in hopes that you will sow
 good . This is the work of restoration, for we want to be a restoration people .
 Use these gifts for your hurting world .
 Restore us to you, oh God .
 Am en . *

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The 8-Step Process: Step 2



Identifying & Qualifying Prospects

How do you draft your list of potential major gift prospects?

- Careful thought
- Research
- Previous giving records

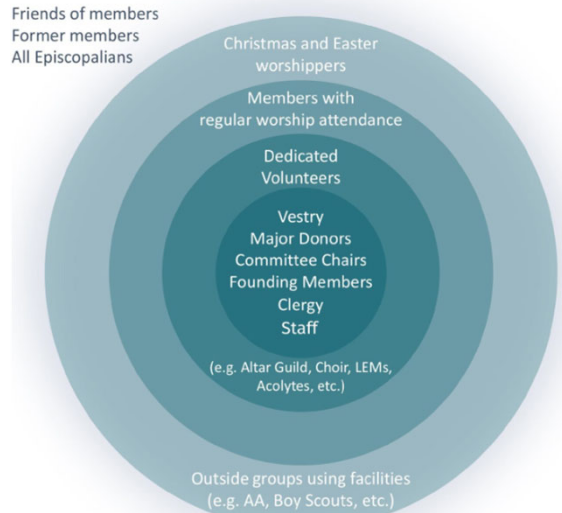
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The 8-Step Process: Step 2



Your Turn: The Constituency Model

Identifying your potential major donors

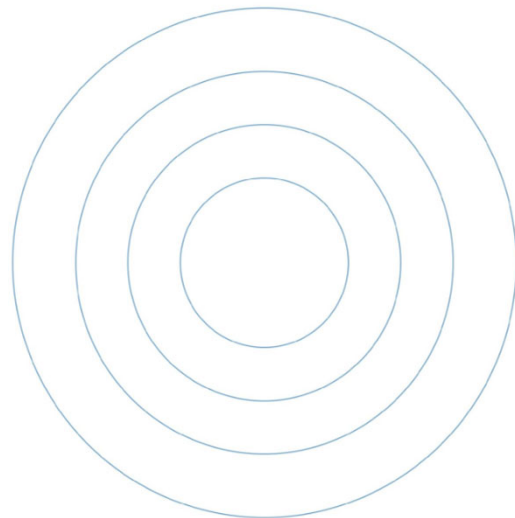


The 8-Step Process: Steps 1 & 2



Your Turn: The Constituency Model

Identifying your potential major donors



8 Step Process: Step 3



Develop a Strategy and Timetable

1. Articulate the "Why"

- Mission and vision of congregation/diocese
- Connect the need to your Why, the mission, and vision
- The 4 Questions:
 - What is the project?
 - How much does it cost?
 - Who decided?
 - What do you need from me?

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8 Step Process: Step 3



Develop a Strategy and Timetable

2. Create the congregation's Wish List

- Project
- Cost
- Timeframe

3. Plan your contacts

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8 Step Process: Steps 4 -6



Cultivation 
 + Solicitation and Negotiation 
 + Acknowledgement and Follow-up 

“Shepherding Process”



- 6 Cultivation Contacts
- 1 Ask
- 1 Follow-up

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8 Step Process: Step 5



Solicitation and Negotiation 

Designing the Ask:

- Where will the ask occur?
- Who will do the ask?

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8 Step Process: Steps 6 & 7



Acknowledgement and Follow-up  + Administration 

How will you thank the donor?


Ideas:

- Phone calls
- Hand-written notes
- Email or mail newsletters
- Videos and photographs
- Appreciation events
- Annual reports

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8 Step Process: Step 8



Renewal 

Beginning again from the beginning...

- When should you ask a donor to give again?
- Hint: It depends!

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Scenario: "Make the Ask" Activity

A baby boomer couple who has been at the church for 25 years is a major giver in the community; specifically, to organizations like the YMCA, the Boys & Girls Club, and the local community choir. They give an average gift of about \$2,500 and haven't increased their gift in 10 years. You are in the middle of a capital campaign. This couple has not participated in the feasibility study. You would like to ask them to contribute to this campaign that would fund multiple projects in the parish. What do you do and how do you ask?

This capital campaign includes:

- refurbishing the bell tower,
- bringing the kitchen up to code to improve an existing feeding ministry and enhance hospitality,
- Endowing a position for children, youth, & family.

Preparation:

How do you go about asking?

Role Play:

One of you is the asker, the other is the donor

And...Action!

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Make the Ask



"Make the Ask" Activity Reflection: Self Assess

- How did it go?
- What was challenging about being the "ASKER"?
- What was challenging about being the "DONOR"?
- What was the most fun or satisfying part of the process?

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Make the Ask



A Few Reminders

Spirituality of Fundraising

- For the Donor: Making a Major Gift offers donors an opportunity to draw deeper into the faith community and what they see as their part in building the Kingdom; their vision of being an "instrument of God's peace."
- For the Asker: Asking for a Major Gift allows the "asker" to use his/hers gifts and passions to grow God's work in this world.

Generative Mentality and Attitude of Gratitude

- Being positive, hopeful, faithful, and grateful will always bring more success than attitudes that are negative, fearful, unfaithful, and ungrateful. See Christ in each other!

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Team Time



Team Exercise:

- Fill out your constituency model (page 9 of VirtualBinder)
- Role Play by teams of 2 (page 14 of VirtualBinder)
- Create a list of major gifts/dream list
- Create a list of individuals with connections to passions and your congregation's needs

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W eek 6 - Project Resource



Prayers of the People



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