

# Deepening our Stewardship Formation

J. Davey Gerhard

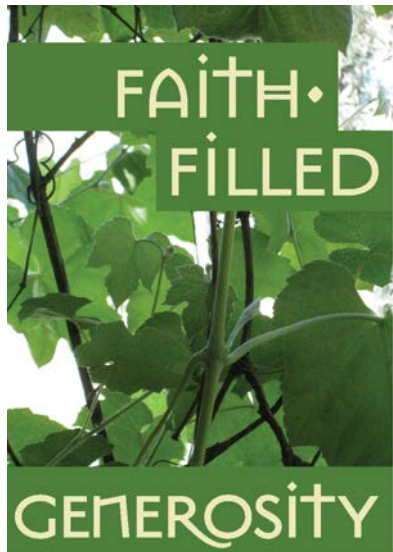
Executive Director

The Episcopal Network for Stewardship



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# Goals for this Webinar



1. Review: Stewardship campaigns are opportunities for relationship and formation
2. Quick review of virtual offering plates and platforms for fundraising in congregations
3. Quick review of virtual event-based fundraising
4. Pledge campaign best practices
  - a) How to ask for money in church
  - b) Small church / big church
5. Tools for deepening our stewardship theology
  - a) Pastoral pitfalls in Stewardship theology
6. Next Level Stewardship



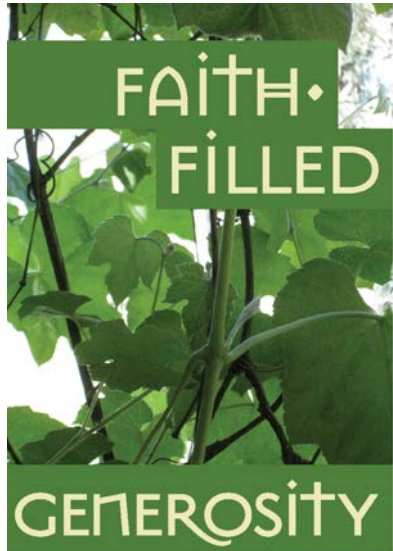
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# It's all about relationship!

## *Connect! Connect! Connect!*

During the isolation of social distancing, maintaining relationships requires frequent communication and connection

- Keep in touch with all members of the congregation
  - Phone calls
  - Emails
  - Newsletters - what's happening at the church and in the diocese
  - ZOOM/Facebook Live
    - Daily Office, Sunday Services, Bible Study, coffee hour, fellowship opportunities



Relationship &  
Formation



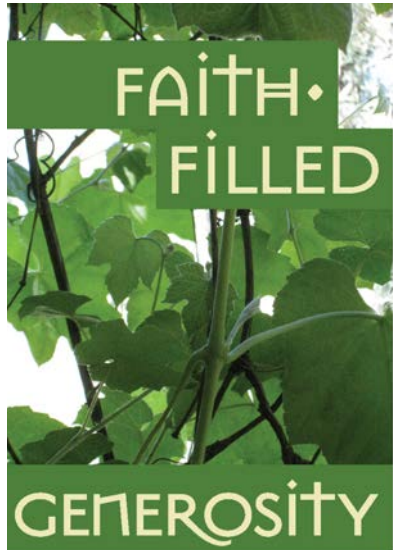
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# It's all about relationship!

## *Incorporate New (online) Members*

Work to capture “online only” members by inviting them to “meet” via Zoom:

- Conversation with the clergy
- Bible Study
- Small group fellowship
- Christian formation - "Episcopal 101" classes, Confirmation Classes
- Book group
- Dialogue on issues of the day



Relationship &  
Formation

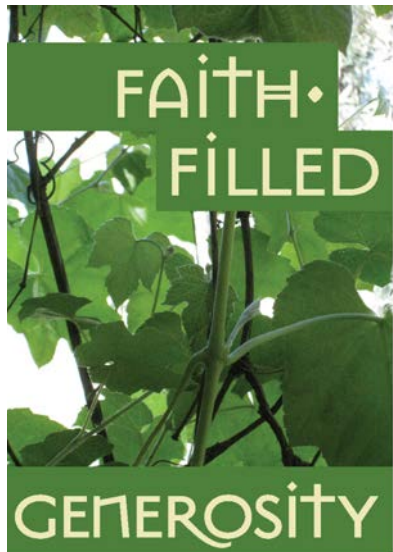


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# It's all about relationship!

Fundraising, like any human venture, is about forming, nurturing, and respecting our relationships.

This is even more important in communities of faith, where we ask each other for our gifts of **experience, wisdom, and resources** to build our churches and sustain our mission.

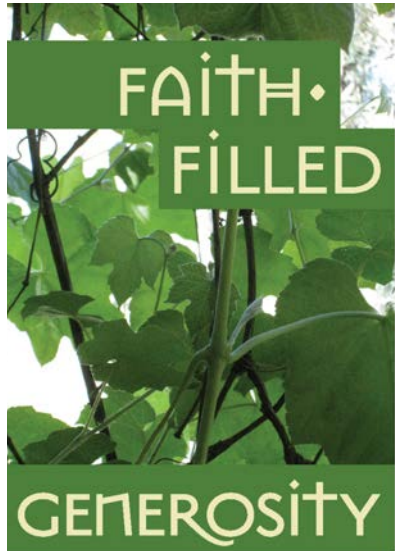


Relationship &  
Formation



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# It's all about relationship!



*Basic concepts of relationship are hallmarks of fundraising and stewardship whether we gather in-person or virtually*

- Frequent, genuine communication
- Teaching and learning about **money and meaning**
- **Clear and concise case for giving.** While you might develop multi-page brochures, narrative budgets, or your essential mission and case for giving should be able to **fit on one side of a 3x5 card.** *(for more on 3x5 statements, see slide 14)*
- Transparent and accountable finances and leadership
- As a stewardship committee member, *this might be the only conversation* you have with a particular member all year. **Use the time to learn about their story** at church.
- Gratitude and timely acknowledgment
- Thanksgiving and celebration
- **Follow-up relating the gifts raised to the ministry supported**

Relationship &  
Formation



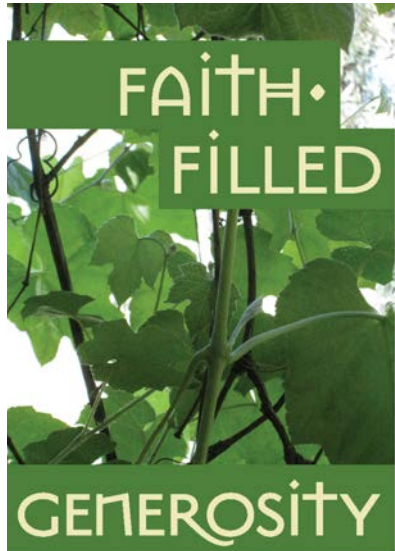
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# What is a virtual offering plate, and why should you have one?

*Every congregation should have the ability to collect donations and pledges online and via mobile platforms.*

## **For plate and pledge:**

- It is no longer usual for individuals to carry cash. More and more people use their credit and debit cards for transactions.
- Receipts are automatic, as are thank-you acknowledgements
- Most donation software gives you at least basic information to reach out to visitors – at bare minimum, an email address or phone number tied to a real name
- More donors rely on online or mobile platforms to make recurring or one-time gifts to nonprofits than ever before.



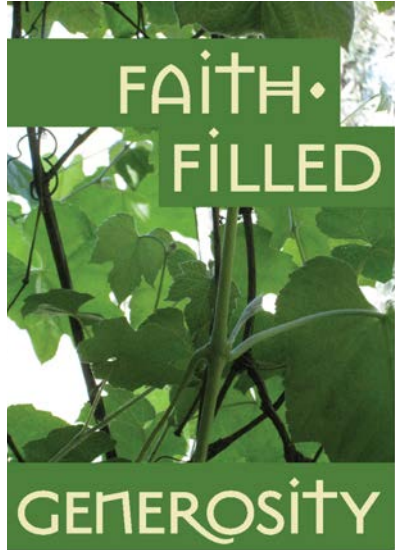
**Virtual Offering  
Plates and  
Platforms**



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# What is a virtual offering plate, and why should you have one?



According to the 2019 Lake Institute study on Faith and Giving

- It's not just Millennials and Gen-Z who give online. **People aged 40-59 are the largest group of online donors**
- Faith-based online giving has grown **8.8% in the last 2 years**
- **59% of donors 66 and above** have made gifts online
- Across mainline Protestant denominations in all areas of the US, churches that accept donations online **increase their giving by avg. 32%**
- You are leaving money on the table if you do not accept online gifts

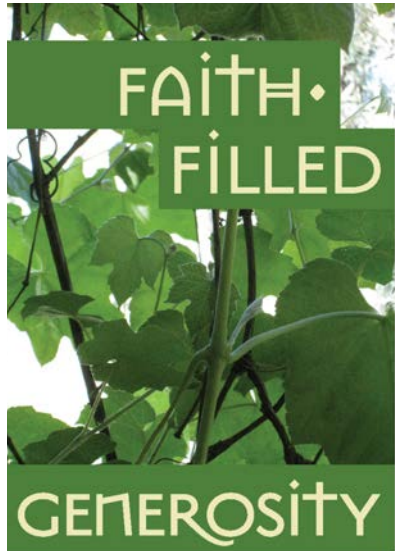
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Plates and  
Platforms



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# What is a virtual offering plate, and why should you have one?



*There is no reason to limit the number of platforms or methods for giving.*

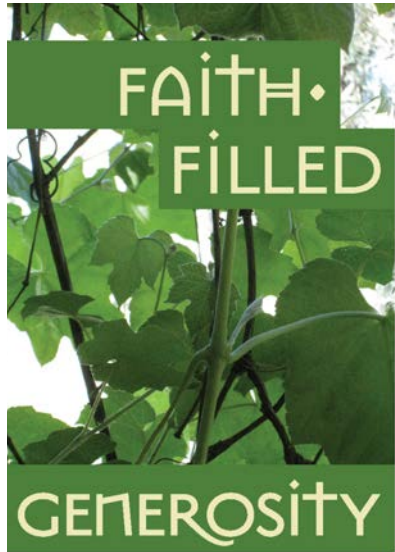
- **Donor-centric** – this means that we make it easy for the giver
- Don't leave money on the table (or in the purse). **Offer as many ways as you can manage** for your offering plate
- Pick platforms that integrate well with your accounting software.

Virtual Offering  
Plates and  
Platforms



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# Virtual Events, Auctions, & Galas



- If your congregation relies on galas, auctions, -thons, or dinners for outreach fundraising, **you can and should offer these virtually, in line with your annual schedule**
- Pick a platform that works best with your needs. It will take some investment of time and set-up fees to implement
- **You can integrate these easily into social media to expand the network of donors**

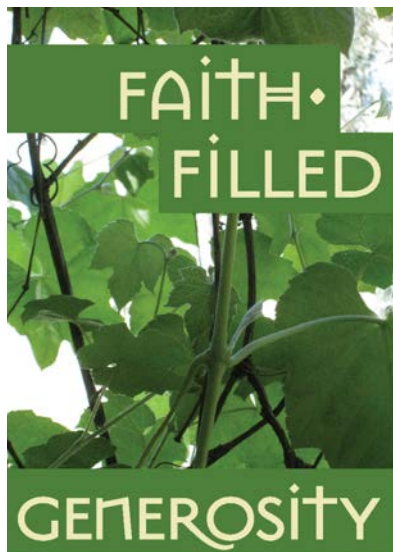
Virtual Event-  
based Fundraising



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# Virtual Events, Auctions, & Galas

*What kind of events might you do?*



**Talent shows!** Everyone can participate from the safety of their own homes. Use online tools in Zoom like polls and voting to give everyone a high score and a thumbs up!

**Dinners!** Choose a menu or options from a local catering company and have members pick up their meals in a bag, eat them together while you watch presentations about the mission or have fun together on Zoom

**Craft fairs / Bake sales!** Show off your skills, and members use bidding or donation applications to win. Delivery is contact-less

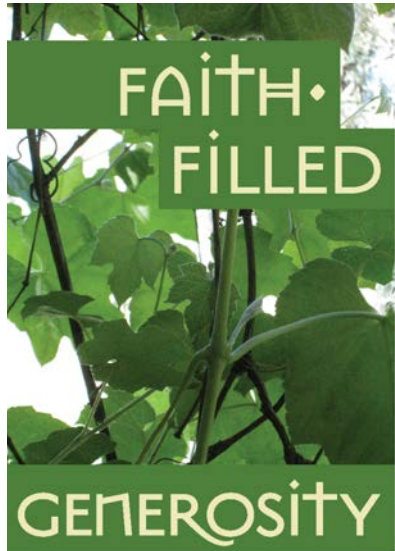
**Auctions, silent or live!** Mission-related, community-based are the best ways to go this year

**Virtual Event-  
based Fundraising**



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# To run a gala and auction virtually for *virtually* no cost:



1. Sell tickets through Eventbrite
2. Promote on Facebook, Twitter, and Instagram
3. Use Zoom to bring people together
4. Use Tithe.ly to collect extra donations or text-to-give campaigns
5. Use ebay for Charity to run your auction

The tools are easy to implement and easy to operate, and best of all, they're free or very low cost.

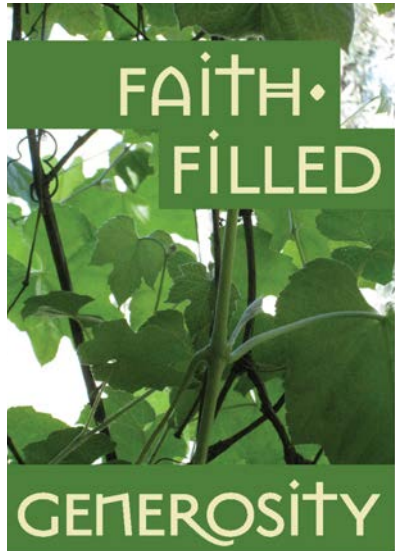
**Virtual Event-  
based Fundraising**



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# Pledge Campaign Best Practices

## *Campaign Check-list*



1. Start early – recruit your team and **train them**
2. **Develop exciting materials** – your case for giving
3. Select and test your technology for delivering pledge materials and gathering pledges and gifts
4. Form your flock **theologically**
5. **Tell stories.** Mission-focused testimonials and impact statements from ministries and programs are inspirational
6. **Celebrate** your kick-off and your Ingathering!
7. Consider using the TENS resources – they're free for your congregation! <https://www.tens.org/resources/>

Pledge Best  
Practices



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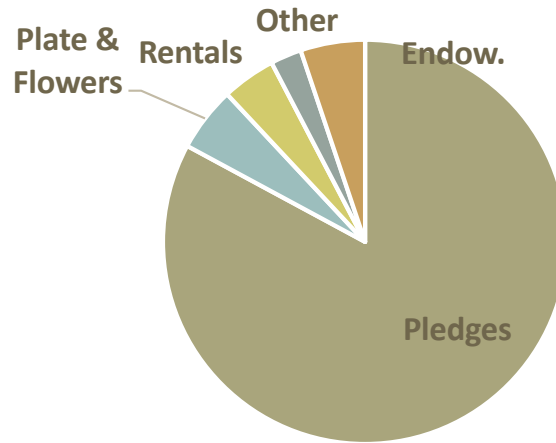
# Pledge Campaign Best Practices

*Narrative Budgets – Telling the story of our money*

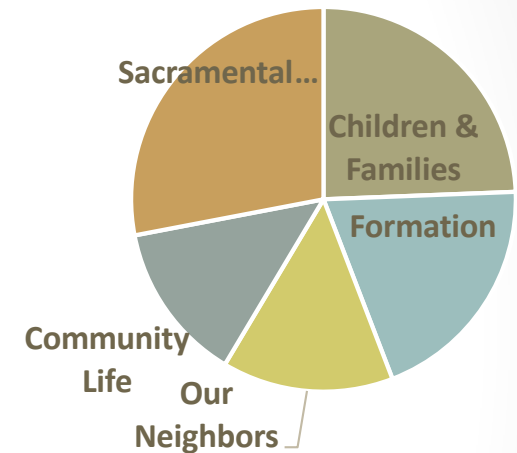
Simplified Line-item budget

Category	Total
Clergy Salaries and Benefits	\$358,971
Music and Altar	\$9,850
Office	\$26,334
Utilities	\$3,100
Building and Grounds	\$22,000
Insurance	\$6,000
Formation	\$20,500
	\$446,755

How we raise our funds



How we spend our funds



Income Source	Total	%
Pledges	\$385,000	82.87%
Plate, Flowers, and Special Offering	\$24,000	5.17%
Facility Rental	\$20,000	4.31%
Other	\$11,575	2.49%
From Endowment	\$24,000	5.17%
	\$464,575	100.00%

Category	Total	%
Children and Families	\$108,914	24%
Formation	\$88,386	20%
Our Neighbors	\$64,357	14%
Community Life	\$59,986	13%
Sacramental Life	\$125,112	28%
	\$446,755	100%

**Pledge Best Practices**



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# Pledge Campaign Best Practices

*Simplified Case Statements show Impact!*



This year we will:  
**Serve** 5200 hot meals  
**Educate** 58 children  
**Gather** for 124 services  
**Provide** Christmas gifts  
for 100 unhoused kids

Front of  
3x5 card

**Plant** and harvest a community garden  
**... and so much more!**

St. Swithen's has been  
Serving the Blue Hill  
Community for 108 years



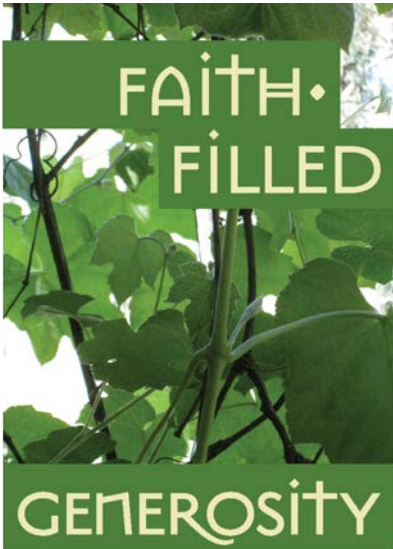
Back of  
3x5 card

*Join us in doing God's  
Work today!*

[www.stswithens.org/donate](http://www.stswithens.org/donate)

[www.tithe.ly.com/stswithens](http://www.tithe.ly.com/stswithens)

[www.paypal.com/stswithenschurch](http://www.paypal.com/stswithenschurch)



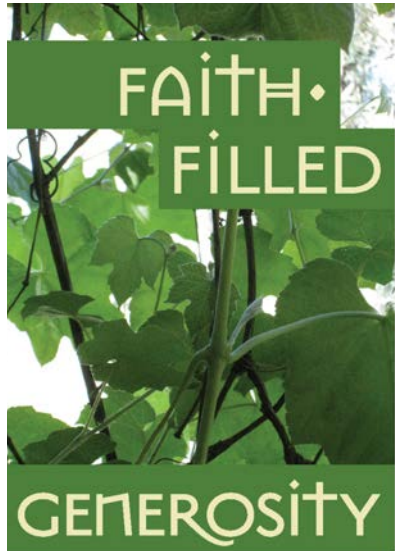
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Practices



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# Pledge Campaign Best Practices

## Pre-Campaign



- **Start early** -- Everything takes longer in the pandemic
- **Research your technology** -- test it
- Build the **hype**
  - Begin making announcements about the Faith-Filled Generosity theme
  - Download our *Introduction to Faith-Filled Generosity*
- **Prepare** theologically
  - The July and August Pentecost reflections **summarize the Gospels of those months, providing a stewardship framework** for them and help congregations prepare the campaign to come
- Drop your first letter from clergy beginning Sept 14-18 - **give the mail time** to be delivered. Also send in email

Pledge Best Practices

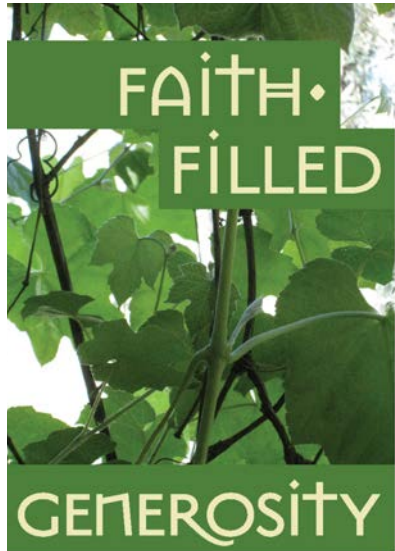


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# Pledge Campaign Best Practices

## During the Campaign

- **Kick-off Sunday**
  - Some communities will begin on October 4. If yours is one that highlights Francis on his feast day, it may be more appropriate to do your kick-off the following week, October 11
  - After the principal service, **hold a special virtual meeting to kick-off** – introduce leadership, have a testimonial, review the campaign materials and case for giving
- Oct 4-17 **Send the next letter** from either your wardens or your campaign chair *along with your stewardship materials* in post and in email
- **Weekly pledge-season inserts** These will help you relate the readings each week to stewardship themes
- **Convene small groups** however frequently your community can



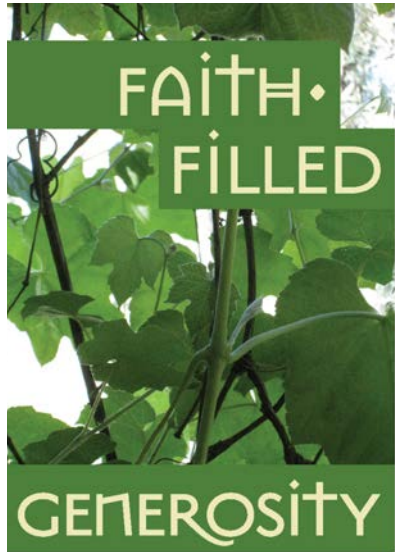
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# Pledge Campaign Best Practices

## *Asking for a gift*



Whether you are asking within the context of a pledge campaign, or making a special request for a capital need, an outreach ministry, or other designated purpose, **asking for money is never easy ...** but it doesn't have to be terrifying or impossible.

Focus on your mission. Know that you are doing good work in the world, spirit-filled and prayer-supported. **There is no shame in being bold.**

Rely on your relationship to guide you, look for body language cues, **listen more than speak.**

**Be clear about the fundraising need** – know the case for fundraising, believe in it, support it with your own time, talent, and treasure.

According to the Ecumenical Stewardship Center, **97% of church members who are invited to pledge make a gift**

Pledge Best Practices



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# Pledge Campaign Best Practices

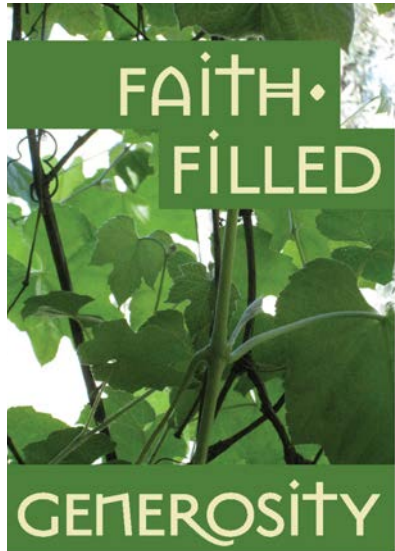
## *How to make the ask*

Renewal: Susan, this year we are raising more money than ever to fund our youth program, outreach to elders, and to help our community. Mary and I made our gift to the campaign, will you join us in supporting the campaign this year?

Increase: Jonathan, my husband and I increased our giving this year because we want to see our congregation grow. Can you make a stretch gift to the campaign this year?

Tough Year: Dick and Bill, your giving to our church has been so faithful all these years, and I know this has been a tough year for you. Still, I am asking you to make a gift to our pledge campaign, no matter the amount. Will you?

Newcomer: Cindy, you and your family are new to our congregation, are there any questions I can answer about why we raise money through pledges or how you can join us?



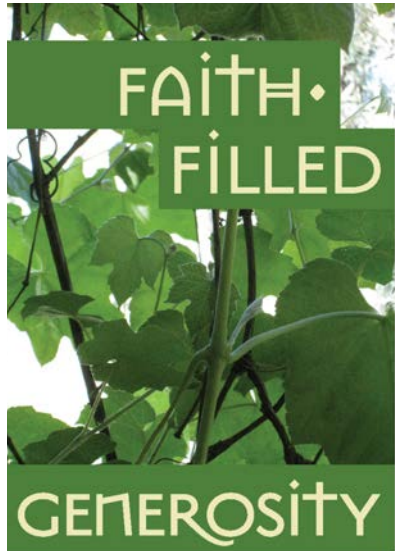
**Pledge Best Practices**



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# Pledge Campaign Best Practices



## What You Can Control

How well you make your case

The setting for the meeting

How much time you have

Your warmth and how you customize information

Your reaction to the donor's response

## What You Cannot Control

The donor's financial well-being

How the donor will react  
The donor's interest

Reasons the donor may not give

The donor's other financial commitments

**Pledge Best Practices**

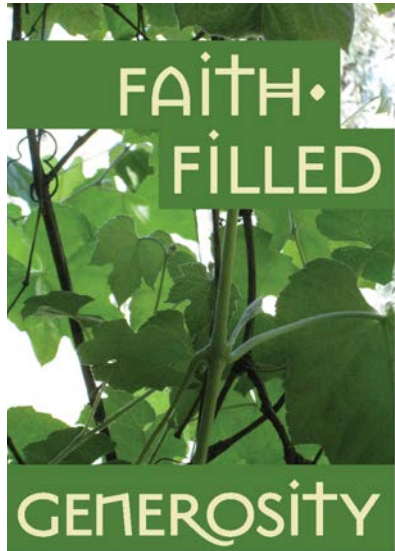


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# Pledge Campaign Best Practices

## *Technology Challenges in Virtual Fundraising*



- Not everyone is on Zoom, Google Hangouts, Facebook
  - Strategies to reach out
- Not everyone feels safe online
  - Security tools for small groups
- Opportunity for intergenerational partnerships

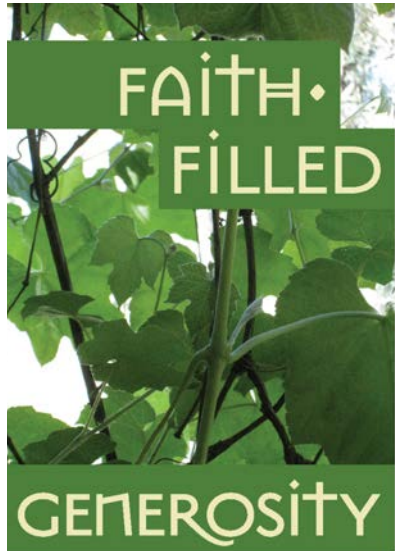
Pledge Best Practices



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# Pledge Campaign Best Practices

## *Small Church Challenges in Pledge Campaigns*



- **Volunteers are stretched this year** as the demands of family, work, school, and social lives are impacted by the pandemic – *a few people do much work*
- Engaging the congregation in small groups might feel like a burden, but the **results are inspirational.**
- There may not be paid office support or trained treasurers to set-up online systems or other robust pledge campaigns
- Mission-focused narrative budgets might seem difficult to explain in smaller-budget congregations, but they're not. **That doesn't change the fact that we should talk about impact and mission.**
- **TENS** Pledge Campaign materials are ready for download, **free for your congregation**, and easy to use.

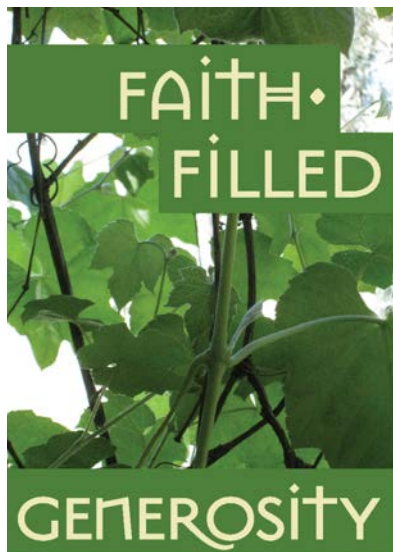
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# Preparing for Tough Conversations

*How to talk about money when there is economic fallout from pandemic-related unemployment*



- There is **no shame** in a household pledging less this year than other years. Every gift matters.
- Remember, **some families are not struggling right now**, so some of your members may be able to increase their giving
- **Every conversation about pledges is a pastoral one**
- **Check in with clergy** about the people on your list, and follow up if **pastoral concerns** arise
- We remember the Great Recession in 2008-2009. We recovered, and we will recover again. **This too, shall pass.**
- Christians are people of Hope.
- **The work of the church is more acute in times of need**

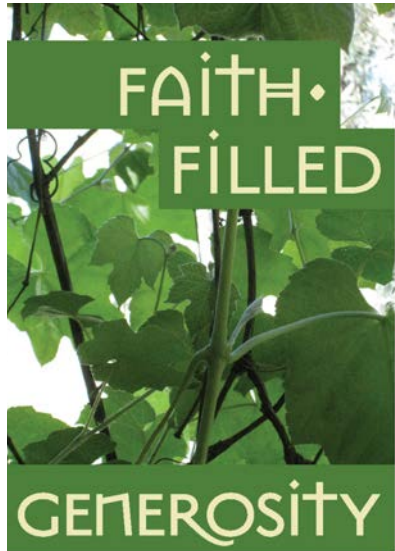
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Theology



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# Preparing for Tough Conversations

*How to talk about stewardship if your congregation is facing budget cuts, program cuts, or staff reduction*



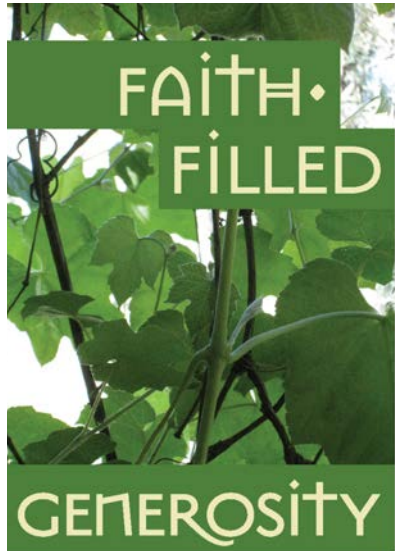
- Keep your conversation **focused on the mission**
  - The work of the church continues because the needs of our neighbors are still present.
  - We may have fewer resources to spend on mission, so we find other ways to do the work of God
- Did your congregation receive an SBA/PPP loan?
  - Remind members that this insulated staff and programs from cuts for a period of time. Thank your staff and treasurer for completing the paperwork for these loans
- There may be some members who can make extraordinary gifts to cover these unexpected shortfalls – **ask them**

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# Preparing for Tough Conversations



*How to talk about stewardship in times of uncertainty*

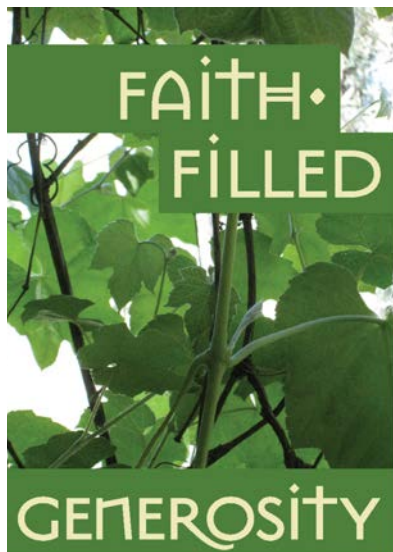
- Our times are often uncertain, it is our **Christian hope** and our prudent planning that can help us prepare and survive this uncertainty
- **Pledges can be changed** throughout the year if circumstances change – we are open and honest
- We can also make gifts from securities or other channels which **may be performing better**
- **The most important thing is to teach that all giving matters**, regardless of the amount. Be prayerful.

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Theology



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# Strategies to Talk about Difficult Topics



- Create Safe Space
  - **Nurture all voices** but keep any one voice from dominating
  - Allow silence or time to process – **give space** for introverts
- Keep things positive
  - That doesn't mean everything has to be "just fine."
  - **Dwell on what's possible**
- Train your small-group leaders or conversation partners on facilitation
  - **Leaders don't need to have all the answers**
- **Pray for each other** in group and outside of group – keep each other in your hearts

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Theology

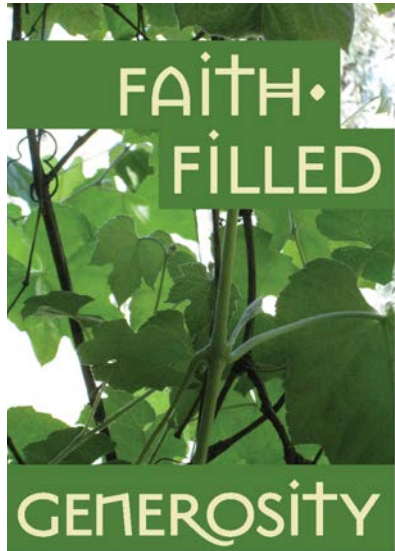


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# Spiritual Money Autobiographies

*A simple tool to get everyone talking about their relationship to money, year-round*



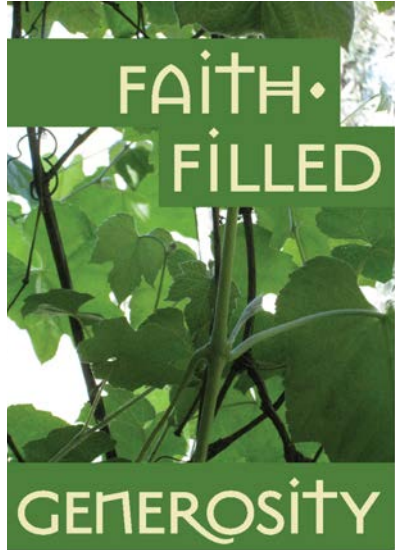
- Does God give us anything? If so, what and why?
- What is your happiest childhood memory in connection with money? What is your unhappiest memory? Did you feel rich or poor?
- How has the role of money shifted in your life as you have gained experience?
- How do you feel about your present financial status? Are you generous? Sparing? Do you feel guilty for what you have? Covetous of what others have?
- How would you feel about asking for help if you could not pay your rent or mortgage? How do you feel if others ask for help?
- How do you deal with the knowledge that 2/3 of the world's population is poor?
- How do you feel about giving to your congregation?

**Next Level Year-  
Round Stewardship**



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# Story-telling – measuring impact of mission



**A client's success story** – If your programs and services are benefiting people, sharing a client's success story is a great opportunity. After all, these are the people who have directly benefited from a donation that made a program possible. Members will want to hear about positive changes in their lives.

**A program staff member's story** – Members of your congregation will love hearing from program staff members because they have such a fiery passion for their work. And if you have a difficult time collecting stories from clients, staff members might be able to share their accounts of the program.

**A story from a member who pledged**– Nothing is more compelling than hearing from someone who has made a financial gift to a ministry. Giving them the opportunity to talk about why they were motivated by this ministry and how they became involved will be inspiring for everyone.

*From "The Storytelling Nonprofit"*

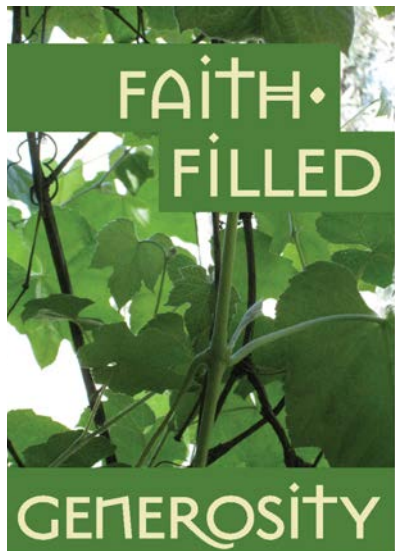
Next Level Year-  
Round Stewardship



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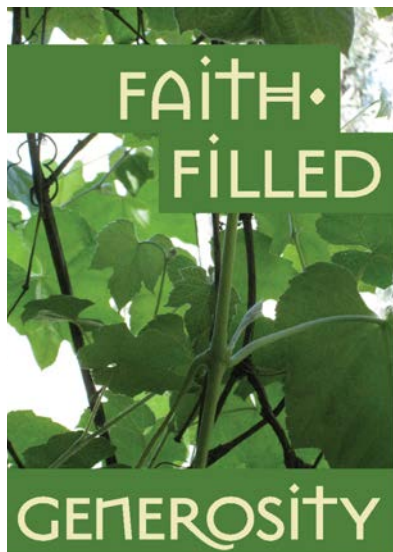
# Baptismal Covenant as a statement of fundraising values

- *Continuing in the Apostles Teaching*
  - Bible Study on a parable about money or possessions
- *Persevere in resisting evil, repent and return to the Lord*
  - How do our financial decisions reflect our values? Have we ever made decisions about money that take us away from our faith values? **What do we do when we feel a conflict between our money and our values?**
- *Proclaiming the Good News*
  - When we talk about our giving as a sign of our faith and an action of our values, we invite others into this relationship. **People who give to their congregations are the best evangelists** in stewardship campaigns
- *Seeking and serving Christ in all people*
  - **How does our church serve our neighbors?** Do we raise funds for the care of our neighbors, or is our stewardship focused on our buildings and staff? How do we talk about what we do?
- *Respecting the dignity of all people*
  - **Every gift matters.** Every gift counts. Help everyone to be a grateful giver.



# Keep the Conversation Going Year-Round!

*TENS provides seasonal reflections to help keep us focused on stewardship and fundraising themes throughout the Christian Year*



Advent: To a world longing for change, we focus on our **gratitude** for all we have received and **communicate our hope** for justice and peace

Christmas: The greatest gifts are the ones we give to each other through our **faithful generosity and abundant love.**

Epiphany: We focus on how we are **Christ's body in the world** as we manifest God in our lives, families, and work

Lent: Dust to dust is a powerful reminder that **planned gifts** are an essential part of faith-based fundraising and giving.

Easter: Our faith and our works are alive, just as Jesus lives. Renewed with joy and refreshed by the waters of Baptism, we can't help but **shout our Alleluias to a world longing for love.**

Pentecost: Our faith scatters us in all directions as we bring **healing, feeding, comfort, teaching, faith, and love** to a hungry world.

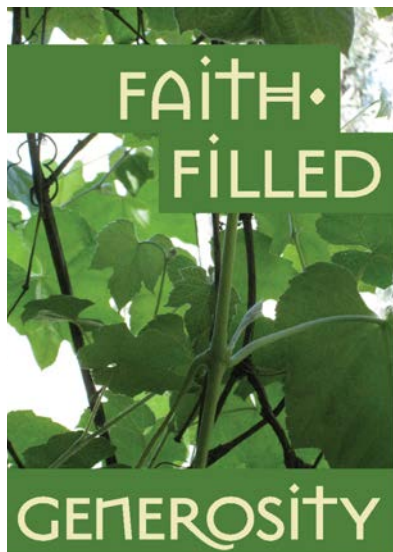
Next Level Year-Round Stewardship



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# Keep the Conversation Going Year-Round!

*In addition to the seasons of the Church year, the great feasts and fasts are good times to talk about stewardship. Use these conversation topics in small groups.*



The Epiphany: What is the star that guides you in how your ministry? How does your faith inform your giving?

The Presentation: When you lift up your eyes to glimpse the future of the Church, what do you see?

Ash Wednesday: If you had to give up everything you had, would you still find yourself rich?

Rogation Days: What is our commitment to the Earth? How does our stewardship for God's greatest gift to us inform our generosity?

Ascension: What gifts does your church need to prepare itself for future generations? To serve your neighbors?

Transfiguration: If we truly saw the face of Jesus in each other, how would we treat our neighbors? How would we provide for their needs?

All Saints: What are the lessons about giving and generosity that you have learned from the saints in your life?

Your Patronal Feast: Who are the people who left legacies and planned gifts to your church? What will your legacy be?

**Next Level Year-  
Round Stewardship**



The Episcopal Network for Stewardship



# Your Questions or Comments



The Episcopal Network for Stewardship

**2020 resources** <https://www.tens.org/resources/member-resources/>

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