



# Evaluating Your Pledge Campaign

January, 23, 2021

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The Episcopal Network for Stewardship

# Learning Objectives

- ▶ Best Practices for evaluating a completed campaign
  - ▶ Reviewing the numbers
  - ▶ Asking the right questions
  - ▶ Reflecting on the results
- ▶ Preparing for the next campaign
  - ▶ Best practices for goal-setting
  - ▶ Best practices for recruiting and training a team
- ▶ Ongoing formation
- ▶ Next-Level Fundraising

*Introduction*

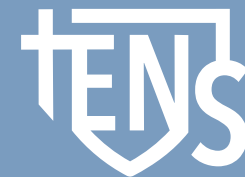


**Now, for some fun...**

Go to [www.menti.com](http://www.menti.com) and  
use the code **76 65 65 4**



**Mentimeter**



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*Introduction*

# Gratitude: The beginning and ending

- ▶ Did you notice how we began with a gratitude exercise?
  - ▶ Gratitude is a practice, needing daily repetition
  - ▶ Gratitude is an invitation
  - ▶ Gratitude is a way of life

*Gratitude Practice*



# Gratitude: The beginning and the ending

- ▶ Every campaign for raising funds in your congregation should start with gratitude.
  - ▶ Thank you for your participation
  - ▶ Thank you for volunteering
  - ▶ Thank you for your gifts
  - ▶ Thank you for your acts of kindness
  - ▶ Thank you for raising a great family

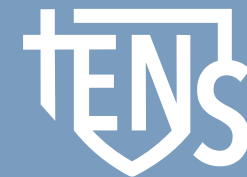


*Gratitude Practice*

# Gratitude: The beginning and the ending

- ▶ Every campaign for raising funds in your congregation should also end with gratitude.
- ▶ **Handwritten notes**, with no financial data at all, should be sent to every person, *even those who did not pledge or make a gift.*
  - ▶ **Every member participates in a campaign**
  - ▶ Thank those who made a gift
  - ▶ Thank those who did not, but who might volunteer, pray, *serve in other ways known or unknown to you*

*Gratitude Practice*



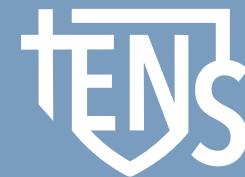
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# Asking the Right Questions: The Numbers

- ▶ What is the total amount pledged for next year? Is this up or down? By what percentage?
- ▶ How many commitment cards were returned? Is this up or down from last year?
- ▶ How many commitment cards show an increase in giving compared to last year?
- ▶ How many commitment cards show a decrease in giving compared to last year?
- ▶ How many commitment cards stayed the same compared to last year?
- ▶ If you use electronic giving, did the number using it increase?



*Evaluating your campaign performance*



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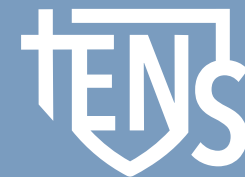
# Asking the Right Questions: The Numbers

What do numbers teach us?

1. They are a practical measure of our expected revenue
2. They are a small window into the capacity and generosity of our members
3. They are part of a measure into the impact or adoption of our mission



*Evaluating your campaign performance*



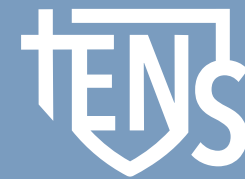
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# Asking the Right Questions: The Numbers

Numbers are an indicator of what is happening ... but they don't tell the whole story

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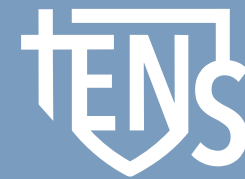
# Asking the Right Questions: The Numbers

A few more notes about numbers:

It's not enough just to report them; but rather to analyze them.

- ▶ What are the trends of giving? Look at giving over time – three years at least.
- ▶ Analyze individuals over time.
  - ▶ Are their gifts staying the same year to year?
  - ▶ Individual giving should trend up year to year
  - ▶ Are there unexplained plateaus? Increases? Decreases?  
**These are opportunities for pastoral conversations**

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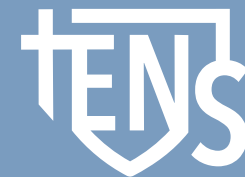


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# Asking the Right Questions: The Feelings

- ▶ Did you share enough information so that people were both inspired and informed?
- ▶ Did the program have the right tone for your congregation?
- ▶ Was there a sense of joy and fun?
- ▶ Did the program run for a good length of time? Too short? Too long?
- ▶ Was the focus more on the Bible or on the bills?
- ▶ Was the focus more on mission or the budget?

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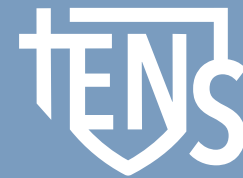
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# Asking the Right Questions: The Feelings

What do feelings teach us?

1. They are better windows into how our members connect with the mission
2. If the campaign didn't feel like fun, or did not have joy, then it's time to look at the messaging
3. Budgets are about more than bills – **members connect with mission**
4. If members did not respond as you had hoped to the campaign, **it might be the approach**, not the mission and not the budget

*Evaluating your campaign performance*

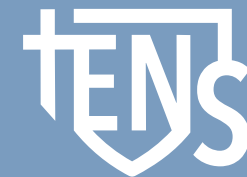


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# Asking the Right Questions: Reflection

- ▶ What did you learn from this year that you want to make sure you consider next year?
- ▶ What do you want to make sure you do next year?
- ▶ What do you want to make sure you don't do next year?
- ▶ What quantitative and qualitative goals might you set for next year's program?
- ▶ How does your committee feel? Are they energized? Disheartened? Exhausted?

*Evaluating your campaign performance*



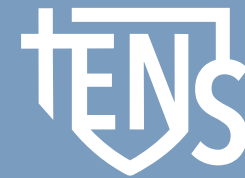
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# Following up

After the celebration is over, the food has been cleared, and the floor swept, there are still a few things left to do...

1. Call your Stewardship Committee back together for a final meeting. **Ask the questions.**
2. Follow up with gifts that haven't come in, **personal emails and phone calls**
3. After you have analyzed the trends, **do you need to have any pastoral conversations?**
4. **Thank your Stewardship Committee**, perhaps even with a small gift. Ask them if they would serve again

*Finishing Your Campaign*

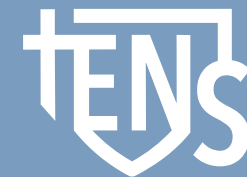


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# Asking the Right Questions: Pastoral Conversations

- ▶ What program or ministry at our church means the most to you?
- ▶ Why did you make the decision to support (or not support) the church this year?
- ▶ What work or ministry do you think we could be doing in the community that we aren't?
- ▶ What are your personal and professional goals or struggles? How can the church support you and your family?
- ▶ In a future year, would you consider making a gift to fund our ministry

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# Fundraising is a cycle

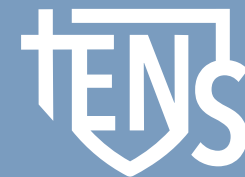
*The Campaign does not end, it just changes phases*

Non-active Phases of a Campaign:

- ▶ Reflection and learning
- ▶ Planning
- ▶ Recruiting the team
- ▶ Forming generous members

This does not mean that you must talk about money every week. **It does mean that you should talk about generosity, gratitude, and opportunity often**

*Preparing for the Next Campaign*



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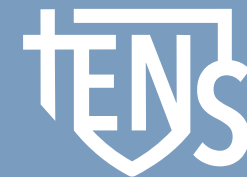


# Setting Goals for Success

Early in the year, **set your goal for next year's campaign.**

- ▶ **Based on what you learned** from your analyses, reflection, and pastoral questions
- ▶ **Broader** than the budget
  - ▶ Goals on new members?
  - ▶ Goals for volunteers?
  - ▶ Goals for new ministry or ministry renewal?
- ▶ **Make a plan** for how you will lead your congregation into next year's campaign

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# Setting Goals for Success

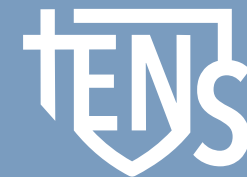
Goals should be

- ▶ Grounded in reality
- ▶ Achievable
- ▶ Aspirational, but not out of reach

Examples could be ...

- ▶ Fifty percent of our givers will increase their giving next year
- ▶ X people who have never given before will make their first gift

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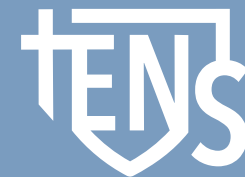
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# A few more thoughts about goals...

Not all your goals need to be about finances.

- ▶ Do you have a goal for how many new families you hope to welcome this year? Why not publish it? **When people know what the goal is, they can help to make it happen.**
- ▶ Other goals impact mission and fundraising:
  - ▶ Creating or refreshing your newsletter
  - ▶ Updating your website
  - ▶ Creating new brochures or materials about your church and your ministries

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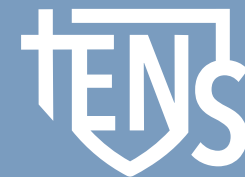


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## Items in your plan

- ▶ I will check in with the five highest and five lowest givers this year
- ▶ I will ask the diocesan stewardship officer to make a presentation or give a sermon
- ▶ Our Stewardship Committee will read a book on generosity
- ▶ The newsletter will feature frequent updates on mission and outreach
  - ▶ Metrics, measures, and impact
- ▶ Pledge reminders and statements will go out quarterly

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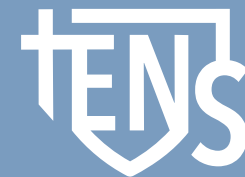
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# Recruiting the Right Team

According to the Rt. Rev. Dan Edwards, Bishop of Nevada, **your stewardship committee should be in place by Easter.**

- ▶ An effective team will raise more money to *fund the church's mission.*
- ▶ They *engender support and appreciation* for all the other parish ministries.
- ▶ The project is a chance for the members of the team to *form or deepen relationships* that are the lifeblood of the congregation.
- ▶ They spread *a spirituality of grateful generosity*, thereby enriching the lives and enlarging the souls of the congregation.

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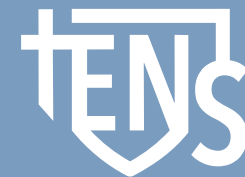


# Recruiting the Right Team

- ▶ *People who know people:* The team's strongest influence is on their friends. You need people who are connected.
- ▶ Diversify the team according demographics like age, gender identity, and racial identity.
- ▶ If the congregation has more than one worship service, include people from the different worship services on the team.



*Preparing for the Next Campaign*



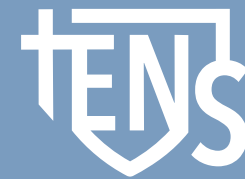
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# Recruiting the Right Team

- ▶ *People who love the congregation.* The Campaign Team represents the congregation to the congregation.
- ▶ How they feel about the congregation and its leadership, both lay and clergy, will come across.



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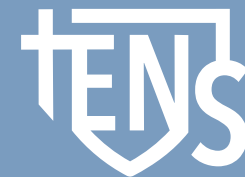


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# Recruiting the Right Team

- ▶ *People with a heart for stewardship.* Not everybody is born to raise money or is comfortable asking for it.
- ▶ Find the people in your congregation who have such a heart for the mission that they can boldly ask their peers to support it.
- ▶ Stewardship is about more than the pledge campaign, it is the life of generosity and worldview of abundance that leads us into Christian community.

*Preparing for the Next Campaign*



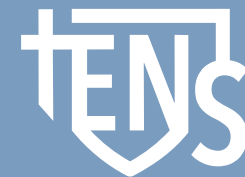
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# Recruiting the Right Team

- ▶ **People with skills.** The chair needs organizational skills to get the job done – like running a meeting, ending with action steps, and setting up accountability.
- ▶ **People with credibility.** Who you appoint to the team tells the congregation whether this is important or not. You need someone on the team who has the respect of the congregation.
- ▶ **People with time.** Choose someone who can be freed up from some of his or her other church work for a year. Do not choose your wardens, your treasurer or your finance committee. *Counting money and raising it are usually incompatible.*
- ▶ **People who can give themselves.** These do not have to be your wealthiest members, but the team needs to be able to set an example of generosity.

*Preparing for the Next Campaign*



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# Theological Formation of Generosity

Generosity is a skill that is cultivated, formed through teaching, practice, and time.

*"Like humility, generosity comes from seeing that everything we have and everything we accomplish comes from God's grace and God's love for us. ... Certainly it is from experiencing this generosity of God and the generosity of those in our life that we learn gratitude and to be generous to others."*

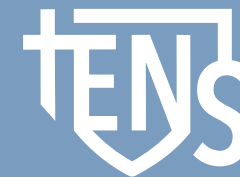
Archbishop Desmond Tutu, God Has a Dream

*Keeping the Conversation Going*

GENEROSITY LOVE GRATITUDE SISTER STEWARDSHIP HOMELESS KINDNESS MANAGE BROTHER TRUST SHARE LEARN  
LEARN WORSHIP TREASURE CONNECT CARE ORPHAN GRATITUDE PATIENCE

WHERE OUR HEARTS ARE...

JOIN GRATITUDE BLESSINGS JOY FORGIVE GRATITUDE ABUNDANCE LEARN  
WORSHIP CARE LEARN CONNECT WIDOW PEACE IMMIGRANT HOPE  
GENEROSITY CREATION ACCEPT CONNECT LITTLE ONES GIVE LEARN CARE  
CONNECT GRATITUDE CARE



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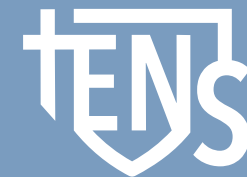
# Theological Formation of Generosity

This year, try **these four things** to keep the conversation of stewardship and generosity alive in your congregation...

## 1. Offer a book study:

Henri Nouwen's [A Spirituality of Fundraising](#)

Charles Cloughen, Jr.'s [One Minute Stewardship: Creative ways to talk about money in church](#)



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*Keeping the Conversation Going*

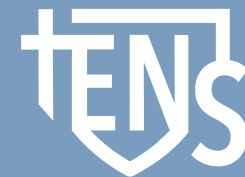
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This year, try **these four things** to keep the conversation of stewardship and generosity alive in your congregation...

## 2. Conduct a mid-year Budget and Mission review, report on ministry objectives and impact

This tool, prepared with the wardens and treasurer, will help people understand the impact of their giving, reminding them that their gifts are important all year long.

*Keeping the Conversation Going*



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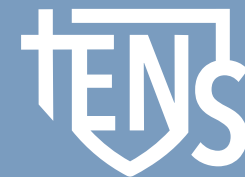
# Theological Formation of Generosity

This year, try **these four things** to keep the conversation of stewardship and generosity alive in your congregation...

**3. Engage in storytelling.** Ask members in a small group to answer this question:

*What was your attitude toward money as a teenager? What role did money play in your life as a young adult? If you are one, as a parent? At age 45? 50? 65? Did your attitude or feelings shift at these different stages of your life?*

*Keeping the Conversation Going*



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# TENS Theme for 2021

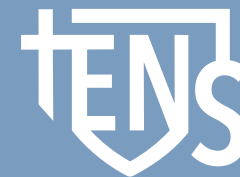
The theme and image for *Every Perfect Gift* are wrapped in the metaphor of the butterfly and chrysalis.

To the ancient Greeks, the butterfly represented the image of rebirth and freedom. The word they used for butterfly was *psyche*, and if you are thinking that sounds familiar, you are correct! It also means spirit. The humble and beautiful butterfly contains the philosophical and spiritual idea of the soul breaking free from its shell — free to **discover, to inspire, to create, to communicate, to share**. *These are the results of our gifts of time, talent, and treasure*

*Keeping the Conversation Going*

Every  Perfect  
Gift 

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The rebuilt TENS website is launching on  
February 1!

- ▶ Refreshed Resource Library
- ▶ 2021 Seasonal Reflections
- ▶ Webinars and Trainings

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