



# Recruiting & Training a Stewardship Team

## Best Practices

Cn. J. Davey Gerhard *Executive Director*  
The Episcopal Network for Stewardship

# Learning Objectives

- ▶ The role of a Stewardship Committee
- ▶ The jobs of committee members
- ▶ Theological Formation
- ▶ How to set goals for Pledge Campaigns

*Introduction*

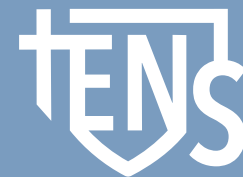


# The Role of The Stewardship Team

The stewardship team is NOT the fundraising committee. As important as it is to raise money for church ministry, **the focus of the stewardship team is to encourage Christians to use their God-given gifts in ways that honor God.**

*Money will be raised because members understand the **relationship between gratitude and generosity***

*Stewardship Team Tasks*



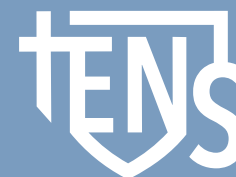
THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# The Role of The Stewardship Team

- ▶ A pledge drive campaign team is your practical team charged with **communicating** this year's theme and plan to raise the operating funds of the church.
- ▶ **Creating** materials for the case for giving – your mission goals
- ▶ Working with the Treasurer and the Communications team to **align messaging**
- ▶ **Plan** the roll-out of the campaign
  - ▶ Timeline
  - ▶ Structure and method
  - ▶ Acknowledgement and follow-up
- ▶ **Plan** Kick-off and Ingathering. *If these are events, this can take a lot of time and energy*



*Stewardship Team Tasks*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

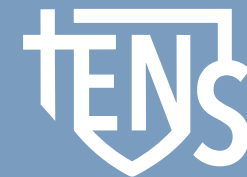
# Personal Asks

**A personal request to join the Campaign Committee is most effective.** Recruit people who have time to do the work, and a real interest.

If someone says they hate talking about money, then they're not a good fit for the team. Recruit by phone, or even better, in person.

**The more seriously you treat the recruitment process, the more you'll communicate the importance of this committee.**

*Stewardship Team Tasks*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

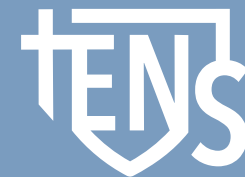
## How big should the team be?

You'll want to recruit a team that is big enough that they can **reasonably reach every member of the congregation by email or phone** to invite them to pledge.



A reasonable case load over a four to six week-long campaign is **about fifteen households**. If you have 150 pledging units, you'll need a committee of ten.

*Stewardship Team Tasks*



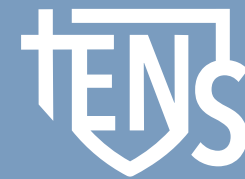
THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# 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.

*Recruiting the Right Team*

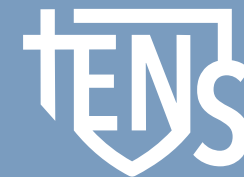


THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# People People

- ▶ *People who know people*
  - ▶ The team's strongest influence is on their friends. You need people who are well-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.

*Recruiting the Right Team*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

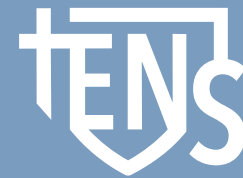


# Congregational Leaders

- ▶ *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.
  - ▶ Evangelists, ambassadors, high-energy folks



*Recruiting the Right Team*

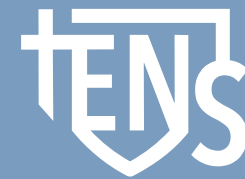


THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# Heart-Centered Leadership

- ▶ *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.**

*Recruiting the Right Team*

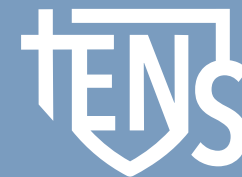


THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# Rounding out the 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.

*Recruiting the Right Team*



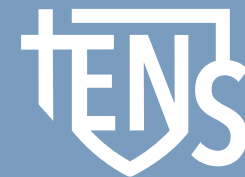
THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# Challenges in Stewardship

*How to talk about money when there is economic fallout from government shutdowns, layoffs, or other instability*

- ▶ 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**

*Pastoral Conversations in Stewardship*

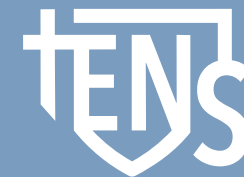


THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# Challenges in Stewardship

*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 any support from the diocese or other outside organizations?
- ▶ There may be some members who can make extraordinary gifts to cover these unexpected shortfalls
  - **ask them**



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

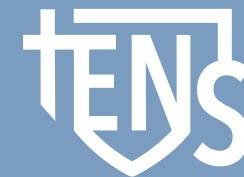
*Pastoral Conversations in Stewardship*

# Challenges in Stewardship

*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.

*Pastoral Conversations in Stewardship*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# Theological Formation of Generosity

# The Money Autobiography

A good exercise for your team is to share common experiences of money and its role in their lives.

<https://www.tens.org/resource-library/spirituality-formation/a-money-autobiography/>

## Forming your Team Theologically

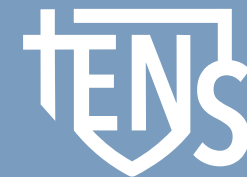


# Your Relationship to Money

- ▶ Our budgets and our finances are mirrors into ourselves.
- ▶ What do you see reflecting back at you when you gaze at your budget?
  - ▶ Buying choices
  - ▶ Saving choices
  - ▶ Priorities
  - ▶ Positive and negative experiences with money
  - ▶ Shame, pride, or struggle



*Forming your Team Theologically*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

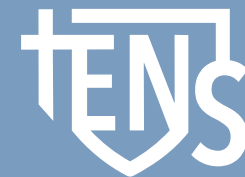


# Your Relationship to Money

- ▶ Why do we use a Money Autobiography as a tool for forming your committee?
  - ▶ Money is a shared tool – we can all relate to it
  - ▶ We use our money to express all sorts of things: emotions, security, preparedness, change
- ▶ What do our opinions and experiences about money say about us?
  - ▶ Are we generous? Cautious?
  - ▶ Are we joyful or bitter?
  - ▶ Are we afraid or hopeful?
  - ▶ How do we feel about people with differing experiences or views on money?



*Forming your Team Theologically*



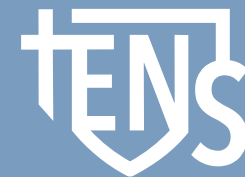
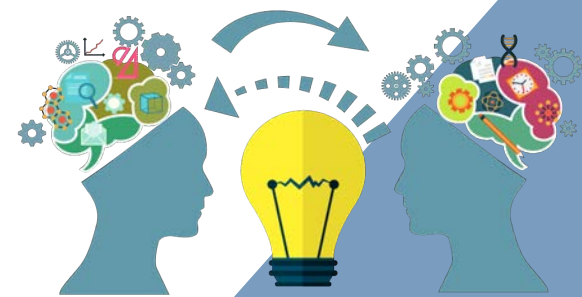
THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# Forming Your Team Theologically

Forming small groups, please discuss this question from the money autobiography:

*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?*

*Forming your Team Theologically*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# Baptismal Covenant as Stewardship Formation

- ▶ *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.

*Forming your Team Theologically*

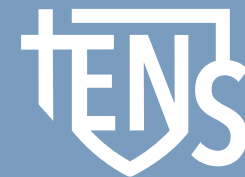


# Setting Goals for Success

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

*Setting Goals*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# Setting Goals for Success

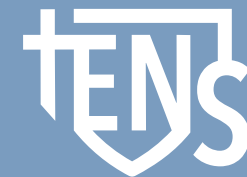
Goals should be

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

Examples could be ...

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

*Setting Goals*



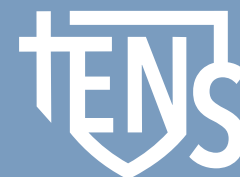
THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# 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

*Setting Goals*

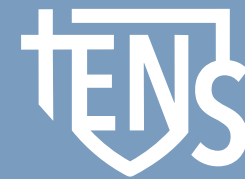


THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

## 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

*Setting Goals*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP



# TENS Theme for 2025

What is the good news that you cannot wait to share with the world? What stories do you have that need to be told, that can help others relate to the world around them? How do you inspire generosity in others by your words, actions, and witness?

The theme of our campaign materials this year focuses on our storytelling, on the way we tell our friends and neighbors about our faith, our ministry, and our mission. What is your good news?

---

*And Mary said, "My soul magnifies the Lord,  
and my spirit rejoices in God my Savior..."* **Luke 1:46-47, NRSV**

*Keeping the Conversation Going*







For more information, resources, and videos,  
find us at [www.tens.org](http://www.tens.org)

TENS 2025 Password: Luke1:46

**Cn. J. Davey Gerhard,**  
**Executive Director**  
415-869-7837 (o)  
415-307-0172 (m)  
[davey@tens.org](mailto:davey@tens.org)  
[www.tens.org](http://www.tens.org)