



Evaluating Your Pledge Campaign

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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



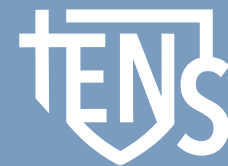
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Gratitude: The beginning and the ending

- ▶ 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

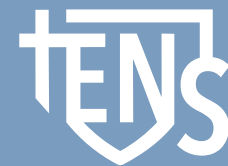


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Gratitude: The beginning and the ending

- ▶ 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

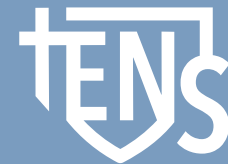


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Asking the Right Questions: The Numbers

- ▶ 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?

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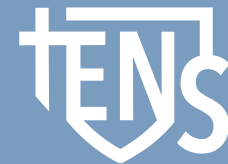
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Asking the Right Questions: The Numbers

- ▶ 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?



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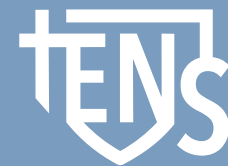
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Asking the Right Questions: The Numbers

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

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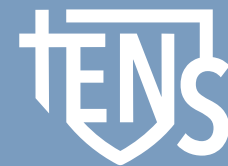


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Asking the Right Questions: The Numbers

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

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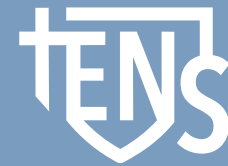
Asking the Right Questions: The Numbers

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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Giving Data Tells the Story

- ▶ Stop talking about “Average Pledge”
 - ▶ Distorts true giving picture
 - ▶ Promotes false minimum
 - ▶ Often pulls from the *magnetic middle*

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Giving Data Tells the Story

- ▶ 138 Households (units) estimated for 2020
- ▶ \$297,923 total estimates
- ▶ **Average (\bar{x}): \$2,159**
- ▶ *Median (M): \$1,550*

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Church of the Advent
Sun City West, Arizona



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Giving Data Tells the Story

- ▶ 110 Households (units) estimated for 2021
- ▶ \$255,156 total estimates
- ▶ **Average (\bar{x}): \$2,320**
- ▶ *Median (M): \$1,810*

Evaluating your campaign performance



Church of the Advent
Sun City West, Arizona



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Estimates of Giving Data

- ▶ Total of Estimates \$255,156 110 Households (100%)
 Avg. \$2,320 *M: \$1,810*
- ▶ First 20% of Estimates 22 Hh = \$117,970 (46%)
 Avg.: \$5,362 *M: \$4,870*
- ▶ Next 30% of Estimates 33 Hh = \$83,646 (33%)
 Avg.: \$2,444 *M: \$2,400*
- ▶ **Mid 30% of Estimates** 33 Hh = \$42,480 (17%)
 Avg.: \$1,322 *M: \$1,200*
- ▶ **Base 20% of Estimates** 22 Hh = \$11,060 (4%)
 Avg.: \$586 *M: \$560*

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Estimates of Giving Pyramid

Shows the wider range of giving in a congregation

Total for 2021: \$255,156 Avg. \$2,320 Median = \$1,810 110 units



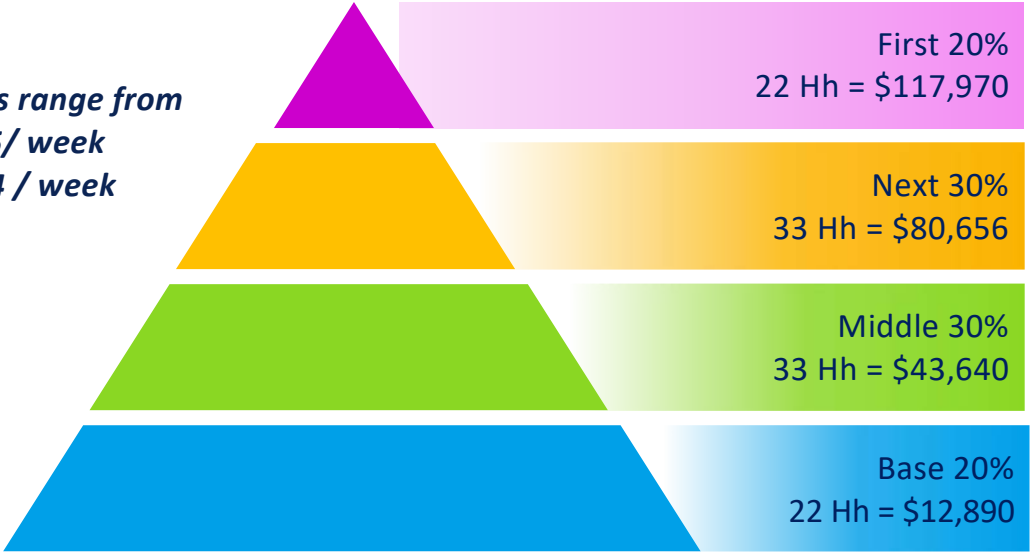
People mentally place themselves on the pyramid once they see it

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Estimates of Giving Data

Totals range from
\$225/ week
to \$4 / week



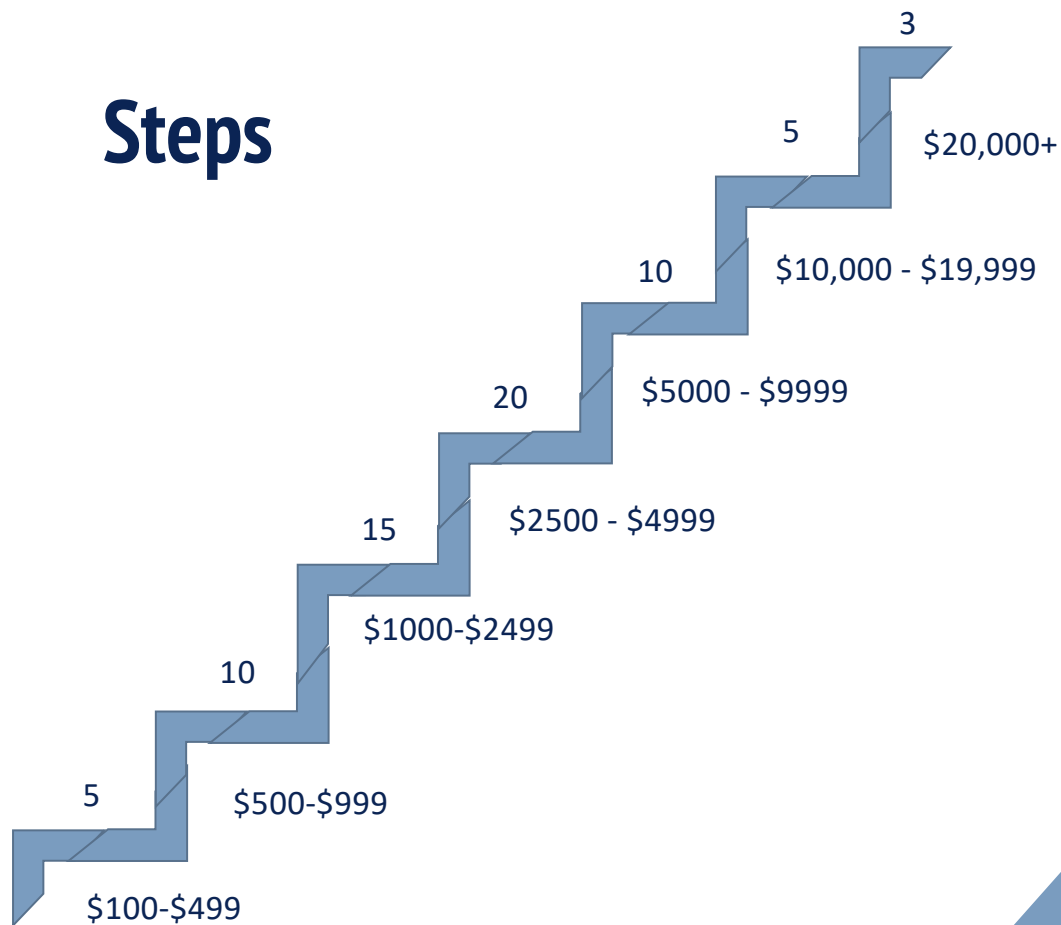
20% of first gives ~ \$103 a week
20% of base gives ~ \$11 a week

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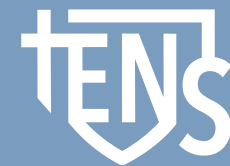
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Steps



More tools to help

- ▶ **This congregation has 68 households that pledge.**
- ▶ **Together, they contribute \$272,800**
- ▶ **Average gift size is \$4012, a little above the national average**
- ▶ **This tool can be used to envision what it would be like to move up a level, and how much that would increase the pledge campaign totals**

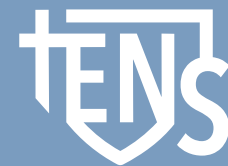


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Proportional Giving

| Annual Income | Weekly Income | Beyond the Tithe | | Tithe | Proportional Giving | | | | | | | | |
|---------------|---------------|------------------|-------|-------|---------------------|-------|-------|-------|-------|-------|------|------|------|
| | | 15% | 12% | 10% | 9% | 8% | 7% | 6% | 5% | 4% | 3% | 2% | 1% |
| \$20,000 | \$385 | \$58 | \$46 | \$38 | \$35 | \$31 | \$27 | \$23 | \$19 | \$15 | \$12 | \$8 | \$4 |
| \$25,000 | \$481 | \$72 | \$58 | \$48 | \$43 | \$38 | \$34 | \$29 | \$24 | \$19 | \$14 | \$10 | \$5 |
| \$30,000 | \$577 | \$87 | \$69 | \$58 | \$52 | \$46 | \$40 | \$35 | \$29 | \$23 | \$17 | \$12 | \$6 |
| \$40,000 | \$769 | \$115 | \$92 | \$77 | \$69 | \$62 | \$54 | \$46 | \$38 | \$31 | \$23 | \$15 | \$8 |
| \$50,000 | \$962 | \$144 | \$115 | \$96 | \$87 | \$77 | \$67 | \$58 | \$48 | \$38 | \$29 | \$19 | \$10 |
| \$60,000 | \$1,154 | \$173 | \$138 | \$115 | \$104 | \$92 | \$81 | \$69 | \$58 | \$46 | \$35 | \$23 | \$12 |
| \$70,000 | \$1,346 | \$202 | \$162 | \$135 | \$121 | \$108 | \$94 | \$81 | \$67 | \$54 | \$40 | \$27 | \$13 |
| \$80,000 | \$1,538 | \$231 | \$185 | \$154 | \$138 | \$123 | \$108 | \$92 | \$77 | \$62 | \$46 | \$31 | \$15 |
| \$90,000 | \$1,731 | \$260 | \$208 | \$173 | \$156 | \$138 | \$121 | \$104 | \$87 | \$69 | \$52 | \$35 | \$17 |
| \$100,000 | \$1,923 | \$288 | \$231 | \$192 | \$173 | \$154 | \$135 | \$115 | \$96 | \$77 | \$58 | \$38 | \$19 |
| \$120,000 | \$2,308 | \$346 | \$277 | \$231 | \$208 | \$185 | \$162 | \$138 | \$115 | \$92 | \$69 | \$46 | \$23 |
| \$150,000 | \$2,885 | \$433 | \$346 | \$288 | \$260 | \$231 | \$202 | \$173 | \$144 | \$115 | \$87 | \$58 | \$29 |

More tools to help



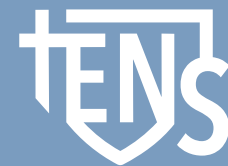
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Asking the Right Questions: The Feelings

- ▶ 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?



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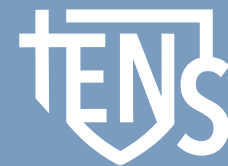


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Asking the Right Questions: The Feelings

- ▶ Did the program run for a good length of time? Too short? Too long?
- ▶ Did people feel they knew *what the church needed* for its budget / giving?
- ▶ Was the focus more on the Bible or on the bills?
- ▶ Was the focus more on mission or the budget?

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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

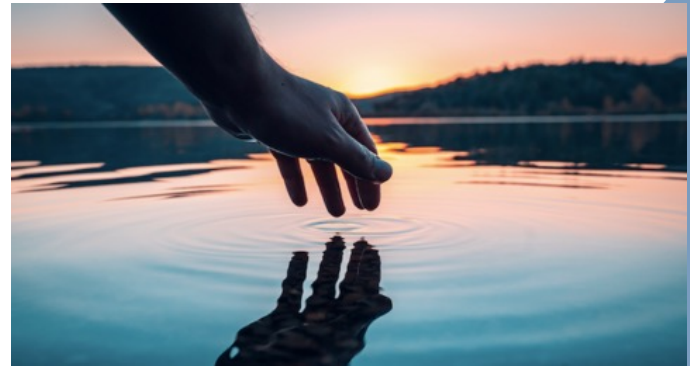
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Asking the Right Questions: Reflection

- ▶ 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?



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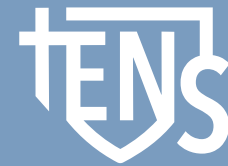
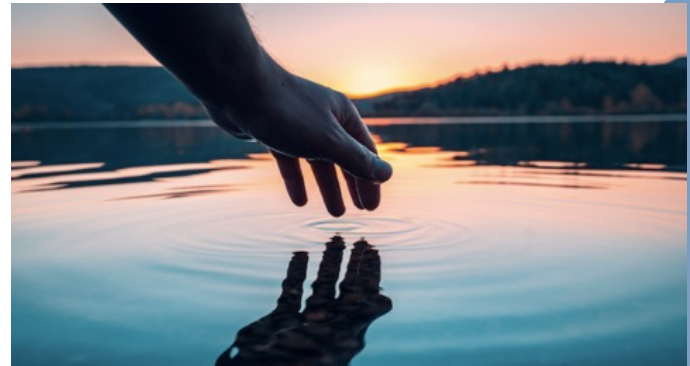


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Asking the Right Questions: Reflection

- ▶ What quantitative and qualitative goals might you set for next year's program?
- ▶ How does your committee feel? Are they energized? Disheartened? Exhausted?
- ▶ What is God calling me/us to give as a proportion of my income *off the top* in my response to God's gifts in my life?

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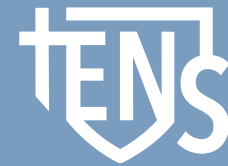
Following up

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

- ▶ Why did you make the decision to support (or not support) the church this year?
- ▶ What program or ministry at our church means the most to you?
- ▶ 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

Finishing Your Campaign



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Fundraising is a cycle

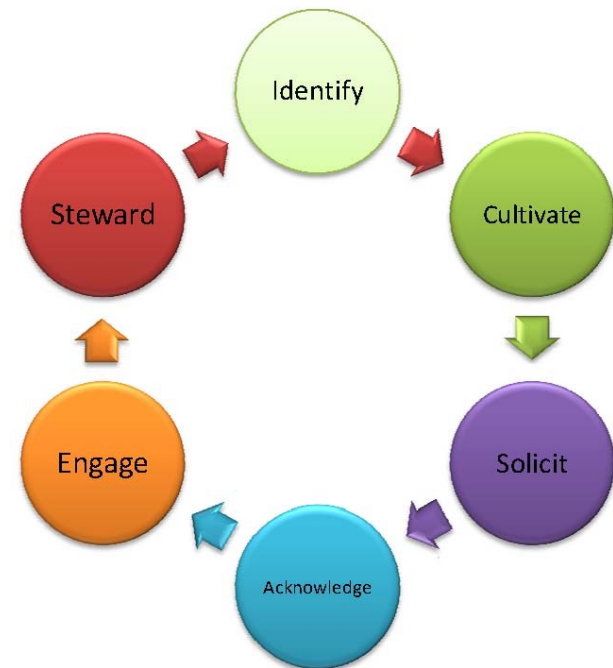
The Campaign does not end, it just changes phases

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

Preparing for the Next 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

Preparing for the Next Campaign



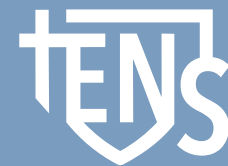
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A few more thoughts about goals...

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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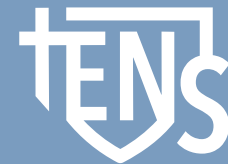


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Items in your plan

- ▶ 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

Preparing for the Next Campaign



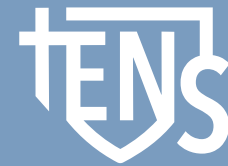
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Spiritual Gifts Inventory

- ▶ Members make gifts in many ways, and each leg of our three-legged stewardship stool is important: Time, Talent, & Treasure.
- ▶ Is there a workshop, a formation exercise, a sermon you might preach about discerning and employing our spiritual gifts?



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 CARE BROTHER TRUST HOPE SHARE LEARN LEARN WORSHIP TREASURE CONNECT CARE ORPHAN GRATITUDE PATIENCE

WHERE OUR HEARTS ARE...

GRATITUDE WORSHIP CONNECT STRANGER POOR WELCOME BLESSINGS JOY FORGIVE GRATITUDE ABUNDANCE LEARN GIVE GENEROSITY HUMBLE PEACE IMMIGRANT HOPE CREATION ACCEPT CONNECT LITTLE ONES GIVE LEARN CARE CONNECT WORSHIP STEWARDSHIP GENEROSITY CONNECT JOY



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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](#)



Keeping the Conversation Going



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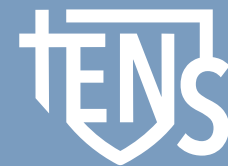
Theological Formation of Generosity

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

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?

You can download the whole Money Autobiography here: <https://www.tens.org/resource-library/spirituality-formation/a-money-autobiography/>



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...

4. Preach a Sermon on generosity in July.

Need help? TENS offers seasonal reflections on the lectionary and themes of generosity and gratitude. Download them for free

Keeping the Conversation Going



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TENS Theme for 2023

The central act of Christianity is one of hospitality – invitation to abundant garden, the offering of that nourishment to all, and the reconciliation that comes by sharing a common act of love. Planted in such a garden of gratitude, we are Rooted in Abundance.

We are grounded in abundance, generosity, and welcome, and we share our gifts of wealth, works, and wisdom with the world in gratitude for having the opportunity to steward them.

*They shall be like a tree planted by water, sending out its roots by the stream. It shall not fear when heat comes, and its leaves shall stay green; in the year of drought it is not anxious, and it does not cease to bear fruit. **Jeremiah 17:8, NRSV***

Keeping the Conversation Going



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For more resources, please visit
www.tens.org

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