



# Evaluating Your Pledge Campaign

Cn. J. Davey Gerhard *Executive Director*  
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*

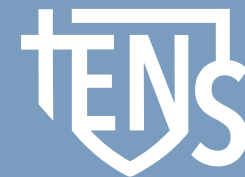


# Gratitude: The beginning and the ending

- ▶ 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*

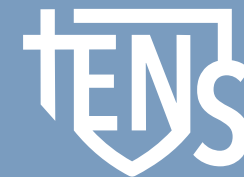


THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# 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*



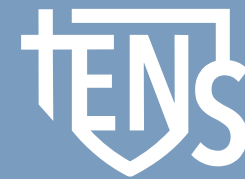
THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# 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?



*Evaluating your campaign performance*



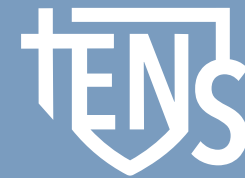
THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# 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?



*Evaluating your campaign performance*

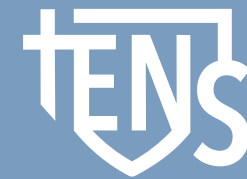


THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# 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



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

*Evaluating your campaign performance*

# Asking the Right Questions: The Numbers

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

*Evaluating your campaign performance*





# 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**

*Evaluating your campaign performance*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# Giving Data Tells the Story

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

*Evaluating your campaign performance*



# 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*



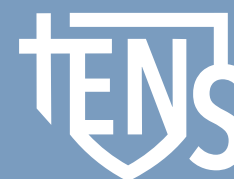
Church of the Advent  
Sun City West, Arizona



# 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

*Evaluating your campaign performance*

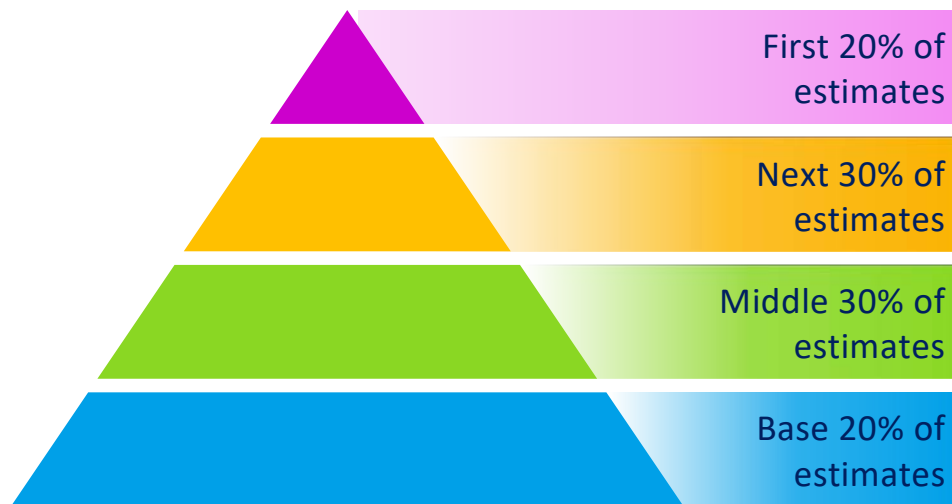


THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# Estimates of Giving Pyramid

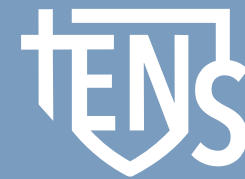
Shows the wider range of giving in a congregation

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



**People mentally place themselves on the pyramid once they see it**

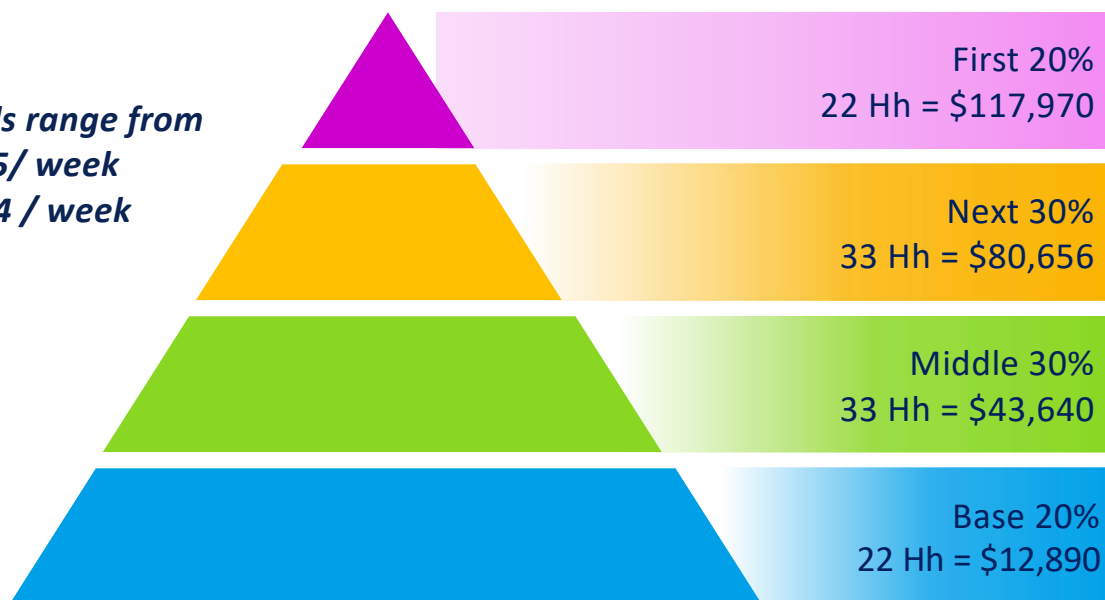
*Evaluating your campaign performance*



**THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP**

# Estimates of Giving Data

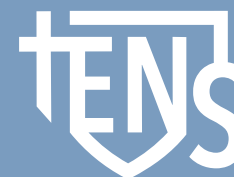
*Totals range from  
\$225/ week  
to \$4 / week*



**20% of first gives ~ \$103 a week**

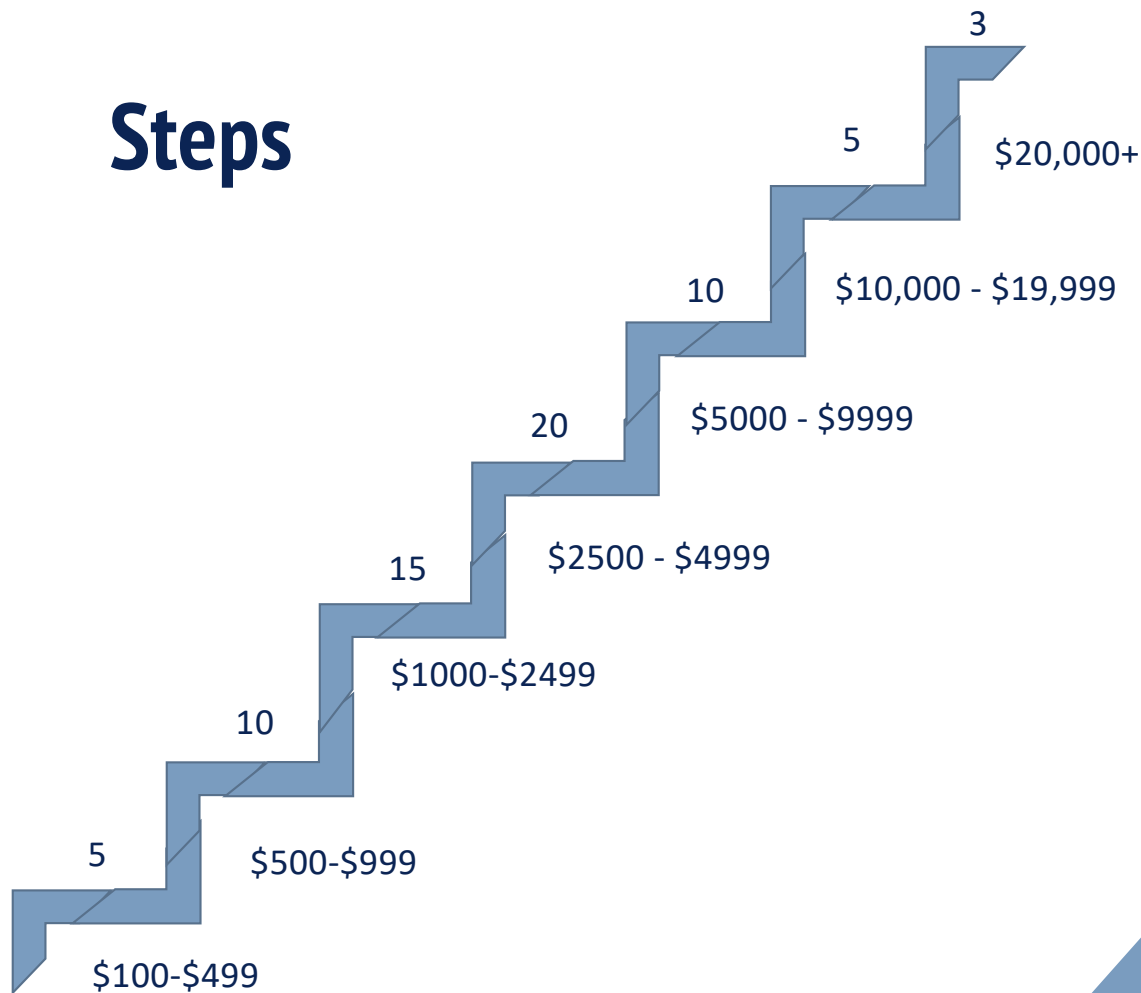
**20% of base gives ~ \$11 a week**

*Evaluating your campaign performance*



**THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP**

# Steps



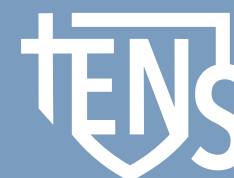
*More tools to help*

- ▶ 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

# Proportional Giving

Annual Income	Weekly Income	Beyond the Tithe		Tithe	Proportional Giving								
		15%	12%		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*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

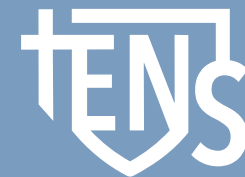


# Asking the Right Questions: The Feelings

- ▶ 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?



*Evaluating your campaign performance*

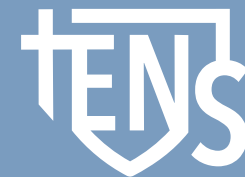


THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# 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?

*Evaluating your campaign performance*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# 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

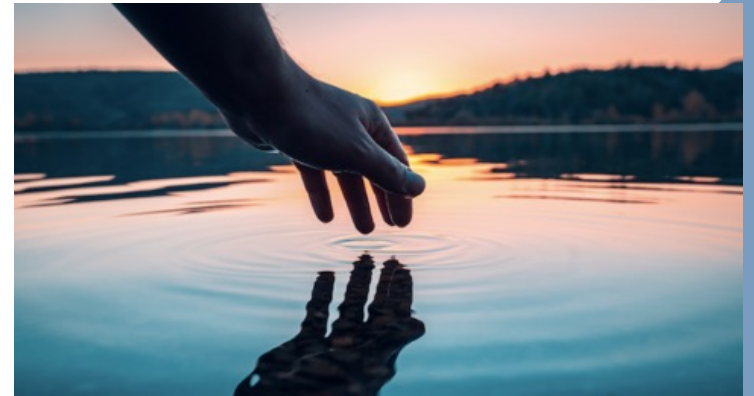
*Evaluating your campaign performance*



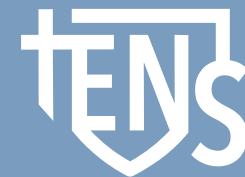
THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# 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?



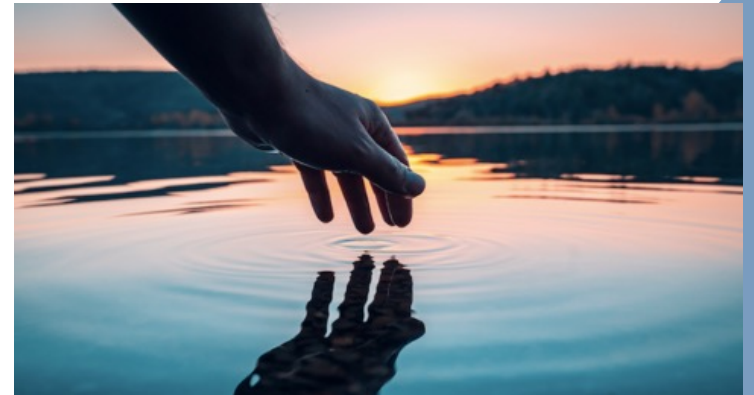
*Evaluating your campaign performance*



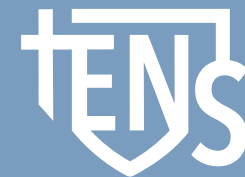
THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# 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?



*Evaluating your campaign performance*

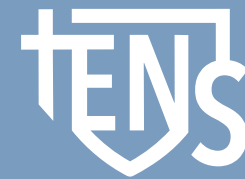


THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# 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



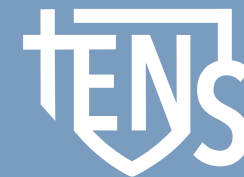
THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

*Finishing Your Campaign*

# 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*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP



# Fundraising is a cycle

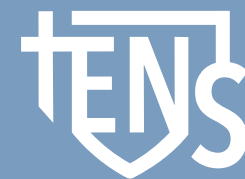
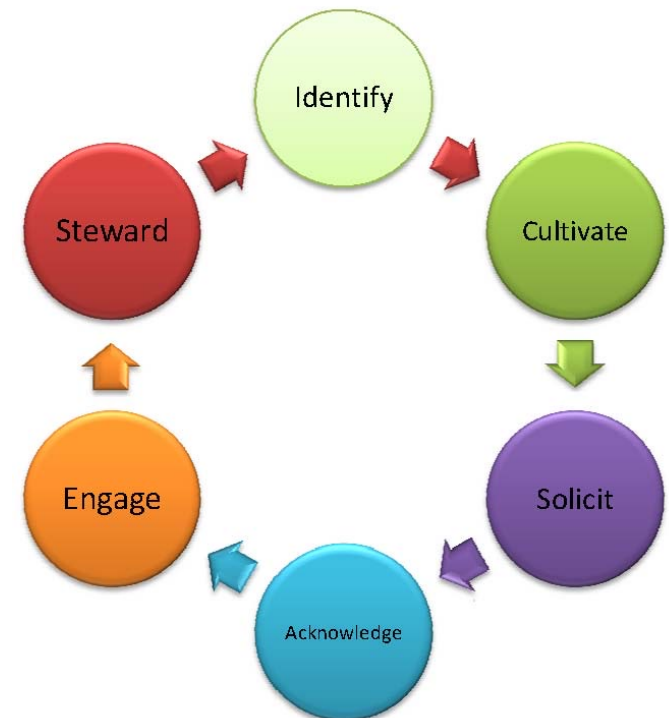
*The Campaign does not end, it just changes phases*

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*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

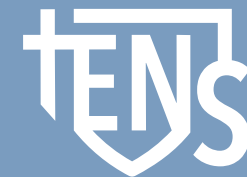


# Setting Goals for Success

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*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# Setting Goals for Success

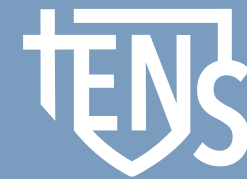
Goals should be

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

Examples could be ...

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

*Preparing for the Next Campaign*



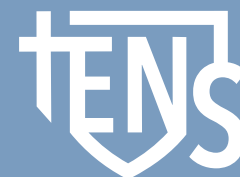
THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# 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

*Preparing for the Next Campaign*

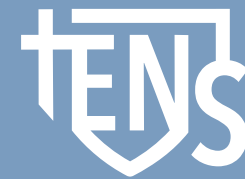


THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

## 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

*Preparing for the Next Campaign*

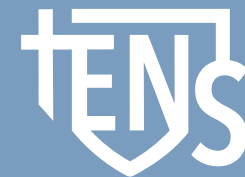


THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# 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*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

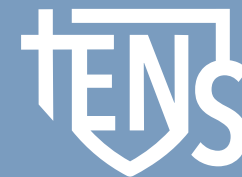
# Theological Formation of Generosity

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



**THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP**



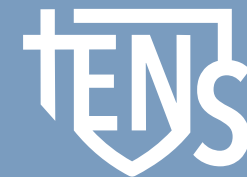
# Theological Formation of Generosity

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



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

*Keeping the Conversation Going*

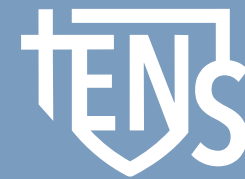
# Theological Formation of Generosity

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*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP



# Theological Formation of Generosity

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

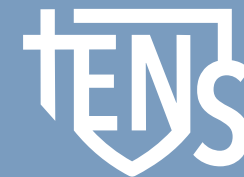
**3. Engage in storytelling.** Ask members in a small group to answer this question:

*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*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# 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



# THE EPISCOPAL NETWORK FOR STEWARDSHIP

# TENS Theme for 2024

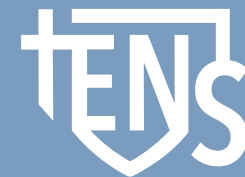
When we walk in love, there is clarity and purpose. We move in alignment with each other and with our values. Walking in love is also something we cannot do alone - by definition it implies connection, community.

Whether we walk with our children or our spouse, or form an orderly line, or rely on the help of a friend or a neighbor, we carry with us all with whom we are in communion and they carry us with them. Our journey is one made by millions, over thousands of years: a cycle of sharing and invitation.

---

*Therefore be imitators of God, as beloved children, and walk in love, as Christ loved us and gave himself up for us, a fragrant offering and sacrifice to God..* **Ephesians 5: 1-2, NRSV**

*Keeping the Conversation Going*



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP



For more resources, please visit  
[www.tens.org](http://www.tens.org)

**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)