**Stewardship in Uncertain Times** – Session #1 (Zoom Presentation)

April 1, 2020 (Siebert Workshops)

Mike Ward Presented: ward@gsbfr.com

* Most important is to communicate the impact stories now. Explain what difference the virtual services are making on the lives of the congregation. Don’t talk about how hard it is to put the virtual services together.
* How to communicate:
	+ Weekly emails. Lead with the outcome stories and tell the generosity stories. Don’t tell them what we do in the church; tell them the impact and outcomes. The offering isn’t to aid with virtual worship but that it is meeting the needs for……. Maybe it is impacts that a small group is making. Good to ask the question “How have you seen God at work this week? Ask all Council Members and this will help you get stories and impacts.
	+ Create a “join us” culture: Don’t make people feel shame or quilt if they need to decrease their giving. Show them how they can grow in generosity even if giving fewer dollars. Need Pastoral sensitivity! Show how they were giving X% of their income and growing that to a higher % of their current income even if it is now less total dollars. Show the positive. Make them feel good.
	+ More people are starting to give with automatic giving. Keep talking about this. VanCo is a good service but each giver’s own bank can also provide the service. Might be better to let the giver initiate with their own bank as this gives them more feeling of control.
	+ Set up a “Challenge Gift”. Get one or two big givers to match up to a limited dollar of giving by others. Or maybe they match up to a certain dollar amount for any new automatic givers that give $30/month or more. Think up new ideas for emphasizing what you are looking for.
	+ Stop stressing scarcity. Need to be good stewards of the church’s money during this time. People will give more dollars to other organizations that are meeting the community needs during the pandemic. The church needs to show they are a good place to give money. Givers must believe their money will make a positive impact (not for the survival of the church).needs to be more important than that). Most are willing to give a higher % of their income during pandemics if they feel it is the “right” place to make a positive impact. They want to give to organizations where their neighbor is being helped. Not to churches or organizations that are internally focused. Things like carpet, building upgrades, etc are not what they are looking to give to at this time.
	+ Don’t ask to tithe the government checks that were received. People need this money. Can ask them to “join” others in giving for a specific purpose outside of the church.
	+ Don’t remind people of pledges during this time as many have lost jobs, etc. Some givers may be embarrassed that they can’t give now. Pastors need to really listen. Good to ask if the church can help them in some way. It is important to keep givers engaged even if they can’t give at this time.
	+ Continue with annual giving funds but be careful of the messaging.
	+ Now is not the time to build reserves. Preserve what you currently have in reserves however. Need to be prepared for the next “pandemic” or global issue.
	+ Continue with offering times during the virtual church services. Use that time to “tell the stories” of generosity and outcomes.
	+ Call one donor a day to say thank you. Need to feel more relationship during this time. Phone call is more personal and not transactional.
* Cares Act: Need to communicate BEFORE about the positive impacts this money will have for the community and church. There is potential that getting this money may result in a decline of giving.
* After the pandemic is over you can consider campaigns again but only where it is critical to the long term future of the church. Need a very strong case and need to wait until we are well into recovery phase and not in crisis phase.
* Pastors need to know the names and amounts of the givers of their church. Many churches keep this with only a few Finance members. Pastors also must know and understand the financials of the church. This is all critical to the future as the Pastors have a leadership role.
* “Where your treasure is your heart will also be”
* If all the Top 10 givers and all the Council are remaining steady with their giving, this is a good story to tell. Makes other givers comfortable and what to “join” in on the group. Understand that it also gives permission for some to give less if they need to during this time.

**Stewardship in Uncertain Times** – Session #2 (Zoom Presentation)

April 29, 2020 (Siebert Workshops)

Mike Ward Presented: ward@gsbfr.com

* Now is not the best time for new capital campaigns however it is fine if want to do a special appeal for something specific. It must be directly related to the goals of the church.
* Now and through the summer months is a good time to be doing strategic planning.
* Stewardship in Recessions:
	+ Initial Positive Response: Need to tell the stories now. What are you using the money for and how has it impacted others in a positive way. Tell the story but don’t name names. Can tell also about people that have contributed more than they committed during this time. May inspire others to do the same.
	+ Decline in giving: Our job is to mitigate this now.
		1. Make phone calls to the **Top 10 donors** (generally these folks are anywhere between 20-60% of total giving). Need to have personal contact. Don’t have to ask for money but should tell all the positive stories, etc. Don’t tell them how busy you have been….tell them the positive impacts and the difference you have made.
		2. Find out the donors are that haven’t given during this time (March 15-April 30, 2020). Watch their pattern of giving. If they only give once a year then don’t expect them to give now. But those that generally give during this time but have not given during this period this year should get a call to understand their situation and tell the positive stories.
		3. Using the text to give option during the on-line service offering time is a good way to remind those that generally give cash when they are at the service. Vanco has text to give.
		4. Thank you notes are very important (quarterly). Find other ways to thank those who are giving during this difficult time or have given more than planned, etc. Include outcome stories and generosity stories.
		5. It is important to continue to communicate by letter (not electronically) about once a month. Stress the outcomes and positive stories and be sure to include a giving envelope.
		6. Now is not the time to develop reserves. One idea might be to let everyone know that any money not need in the coming month (any excess) will be given to \_\_\_\_\_\_ (a specific charity).
		7. Crowd funding can be an option.
* WeRaise (has a high fee however)
* GiveLively (personal fundraising page)
	+ Surge in giving: generally this is led by the major donors
	+ New Normal: Everyone joins in the giving.

**Raising Money after the Pandemic** (Zoom Presentation)

May 5, 2020 (Siebert Workshops)

Mike Ward Presented: ward@gsbfr.com www.gsbfundraising.com/catalog/news/

* Mike’s book: “Abundance: Creating a Culture of Generosity” Fortress Press 2020
* The current trend is that giving is up during this time. However guest giving is down. For some churches, guest givers are a large % of their total giving.
* Start working on Strategic Plan:
	+ Virtual worship is here to stay but what is the goal of virtual worship?
	+ Prepare for the surge to be led by the major donors (if major donors are aligned)
	+ Need to prepare for this: Vision, Recruit the Leaders for the appeal, prepare your case for the campaign, and refine your lists.
	+ Summer could be a hard time for many non-profits.
	+ Campaign should be extra gifts for something specific (not for a 3 year campaign).
	+ Your Council has to be ready to give. They need to lead by example.
	+ Use summer to prepare and refine your lists. Know who your givers are.
	+ Need to build confidence in the campaign.
	+ You must have a lot of donors. But really need a good number of big donors otherwise your campaign will fail.
	+ Build the case for the campaign now. Must talk about the impact and vision.
	+ Could get a few major donors to offer a “Challenge Gift” to stimulate others to give. A challenge gift is a matched give for other gifts up to a certain $ amount.
	+ Before starting a campaign, be sure to have the top 3 gifts secure. Also need 100% of the campaign team and 100% of the Council supporting financially to the campaign in a big way.
	+ Don’t forget about non-members. They are important to all campaigns. They become givers to a campaign when the stories are good and impactful.
	+ You may want to set a goal at 10-20% beyond the need. This is fine if you explain you are doing this upfront.
	+ A special Appeal is for 1 year or less. Also the goal should be less than the current operating budget.
	+ Steps:
		1. Solicit virtually 3. Know how to gather virtually
		2. New donor introductions virtually. 4. Have a gift chart

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| Gift chart for goal of $1,100,000 (Example) |  |
| 1 giver at $150,000 | 3 givers at $35,000 each | 18 givers at $3,000 each |
| 1 giver at $100,000 | 8 givers at $25,000 each | 20 givers at $1,200 each |
| 2 givers at $75,000 each | 14 givers at $5,000 each | 20 givers at $600 each |
| 2 givers at $50,000 each | 14 givers at $5,000 each |  |

**11/1/21 Stewardship Training (#4) notes**

**Pastor Mark Ward**

Should communicate to congregation the # of increased pledges, average increase, and it would be great to have a story by one of the increasing members if possible.

**Written Thank you notes:**

1. A form letter with a personal note (with $ given to confirm you have it correct) and signature (in blue so shows it is not a copy). This should go out to within 48 hours of receiving the pledges.
2. Later a handwritten personal note should go to each pledge family. This could be signed by the Stewardship Committee Chair. Should go out before the end of 1st quarter of the new year. There could be 3 different types of notes and the person writing the notes would not need to know the amount ($ or %)…see below. Some suggested wording will be out of the share site. “Thank you for joining the others in our church community to grow in generosity…” Be sure to use blue ink!
	1. Those that increased
	2. Those that stayed the same
	3. Those that decreased.
3. Need to continue to cultivate a community of generousity throughout the year. This will be the focus for the last session #5.

**Endowment:**

Estate planning works only when the church has a strategic plan!

1. Always follow up with those that have marked that they are interested in estate planning or help on the pledge card.
2. Endowment Bylaws are important. The first 2 to 2 ½ million of endowment funds should go towards care for the facilities. This is a must and something that should have been done 60 years ago but now the need is greater. Must keep up the facilities and today’s children do not really appreciate the need for facilities. After the 2 million Endowment fund is established for the facilities care, then anything above that amount can go to a separate endowment for gifts. Endowment should not by an Outreach Program but more about advancing the Gospel. So it really is not about benevolence because Endowment is not a Community foundation so should not be focused on funding other entities. Also, be sure to have a gift process and policy. How will gifts be accepted, how will we handle those gifts that are restricted, how will we handle unrestricted gifts, how will stock be liquidated (suggest that stock is liquidated the day received as Endowment should not be in the market forecasting business).
3. ELCA supports congregations on setting up Endowment funds and getting policies and procedures established.
4. The average estate gifts $300k with $100k going to the church.