

Leading Where You've Never Been Before

The Episcopal Diocese of Southwest Florida

Kristine Miller, CFRE, Partner

Scott McKenzie, PhD, Partner

Terry Goolsby, Senior Vice President

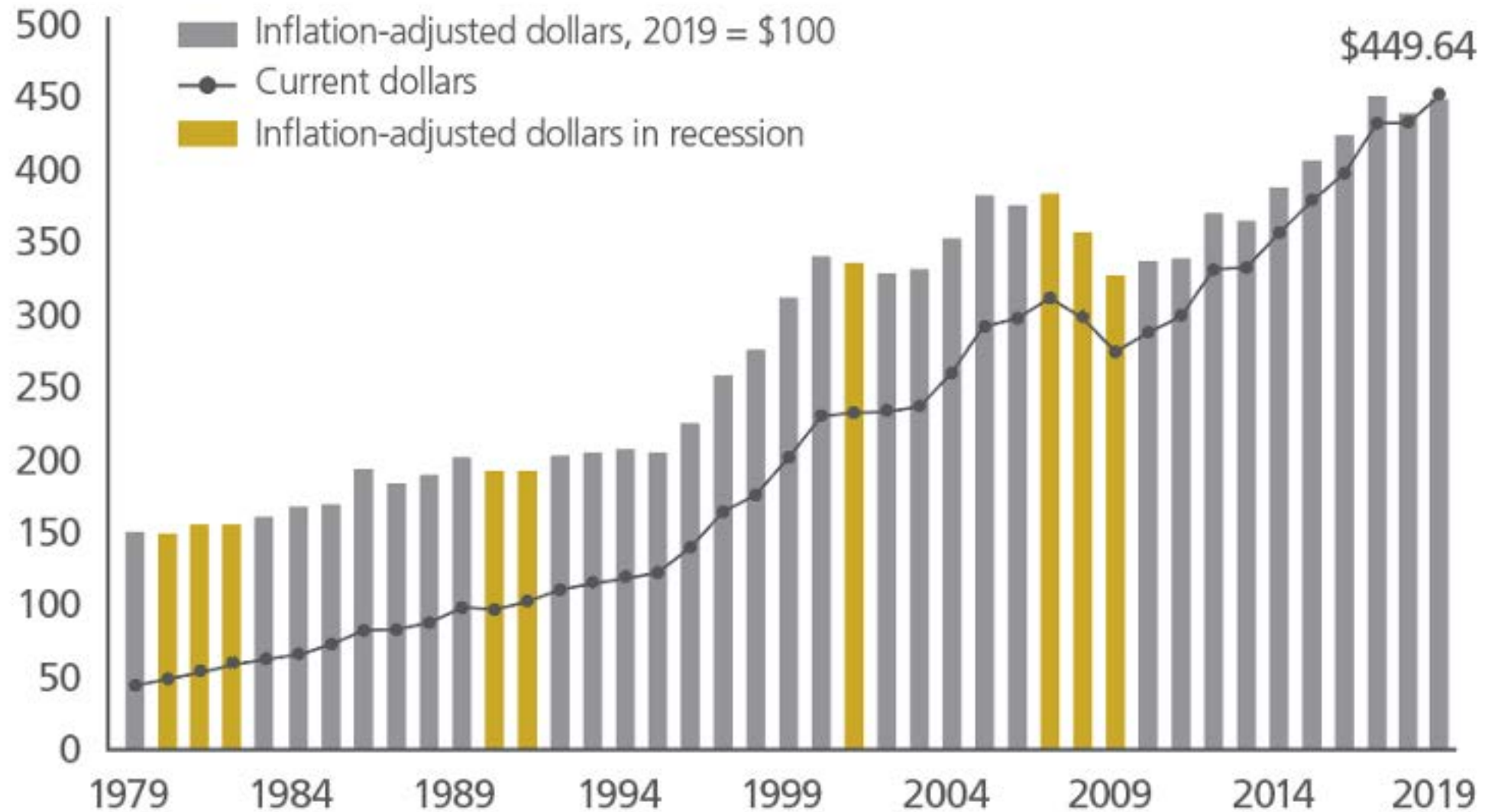




Where We Are

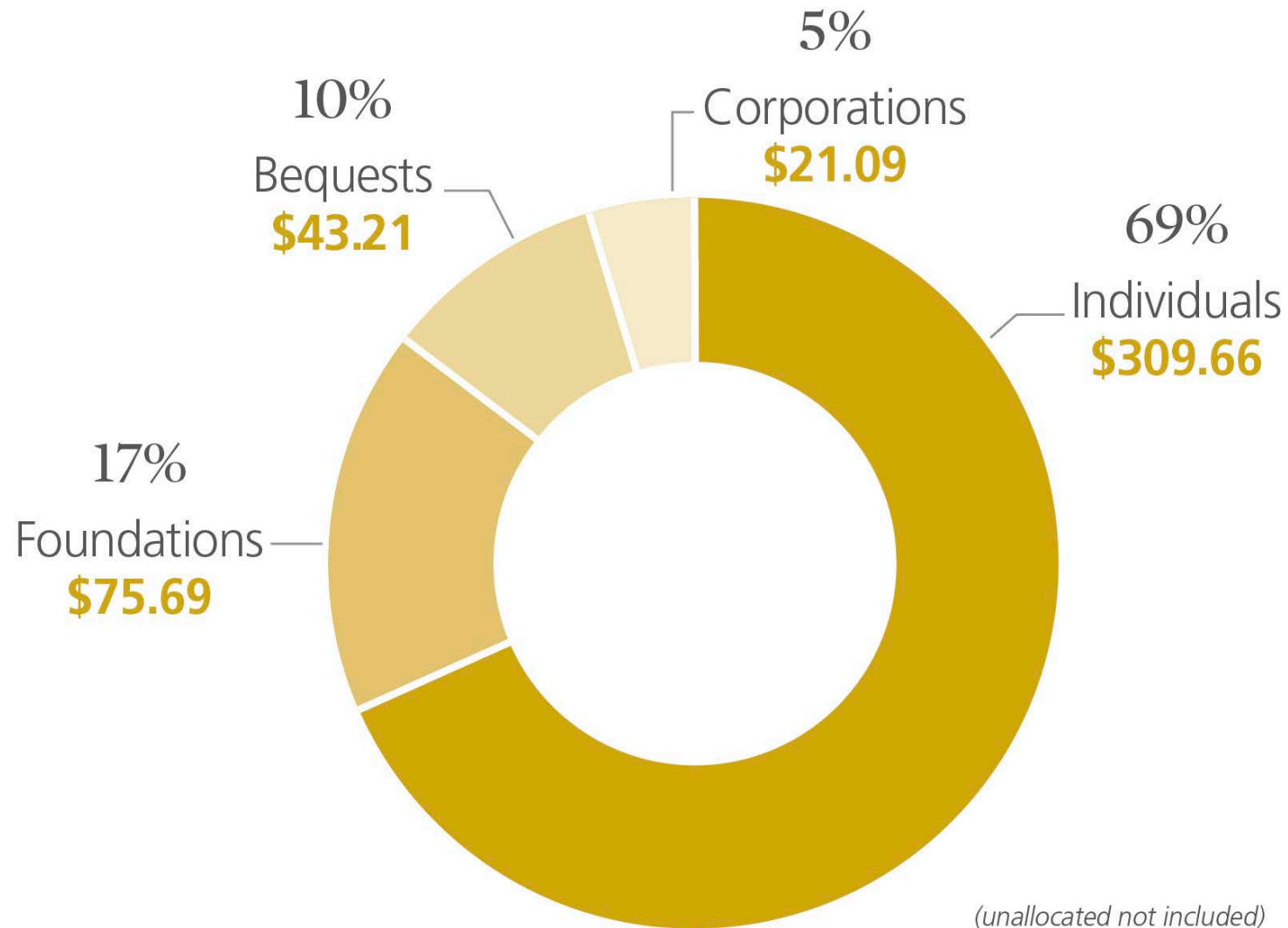
- The local church has changed
- Ministry needs and opportunities are increasing
- Thinking the same way is not an option
- Giving to religion is at an all-time low

Total giving, 1979-2019 (in billions of dollars)



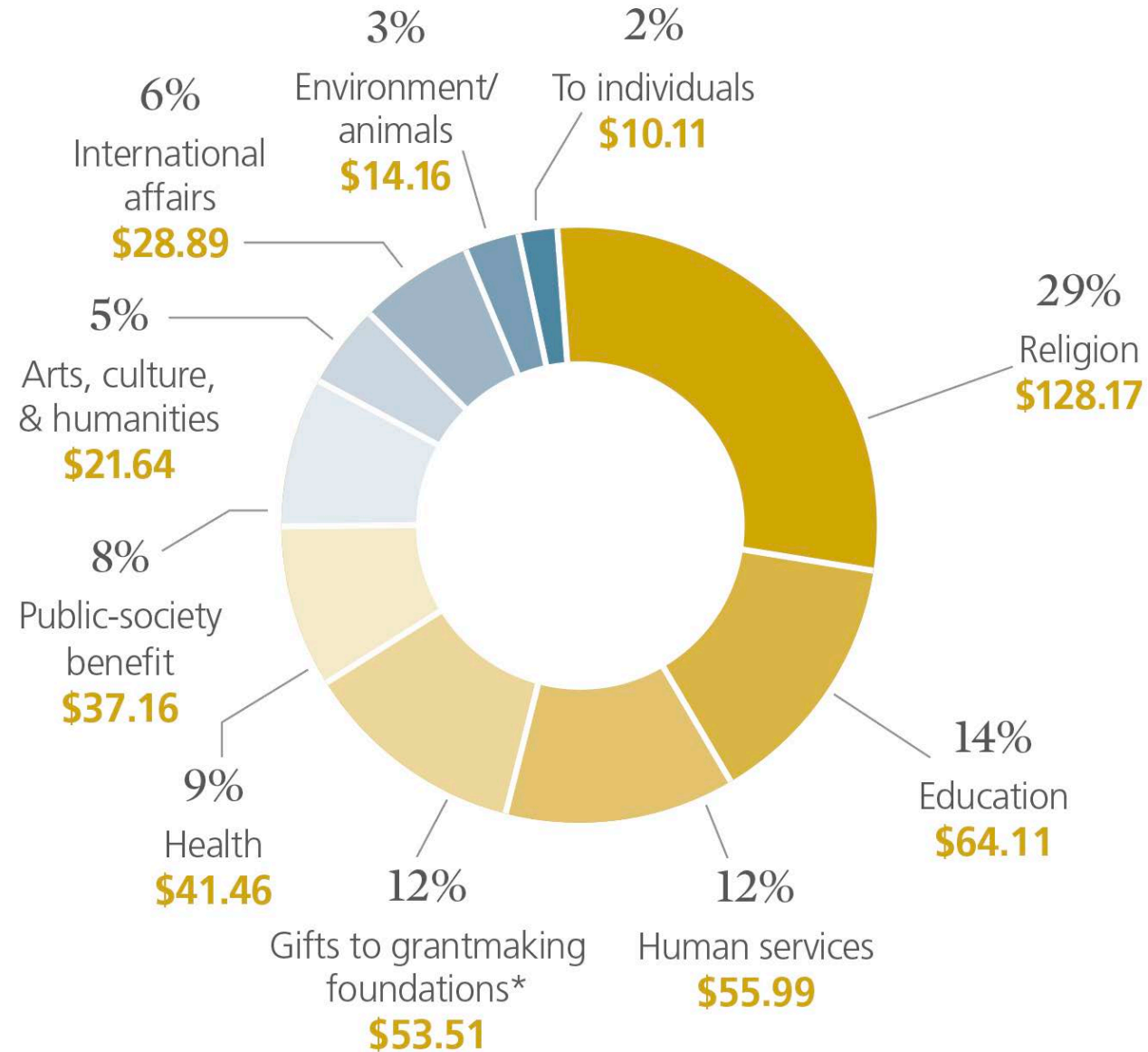
2019 contributions: \$449.64 billion by source of contributions

(in billions of dollars – all figures are rounded)



2019 contributions: \$449.64 billion by type of recipient organizations

(in billions of dollars – all figures are rounded)

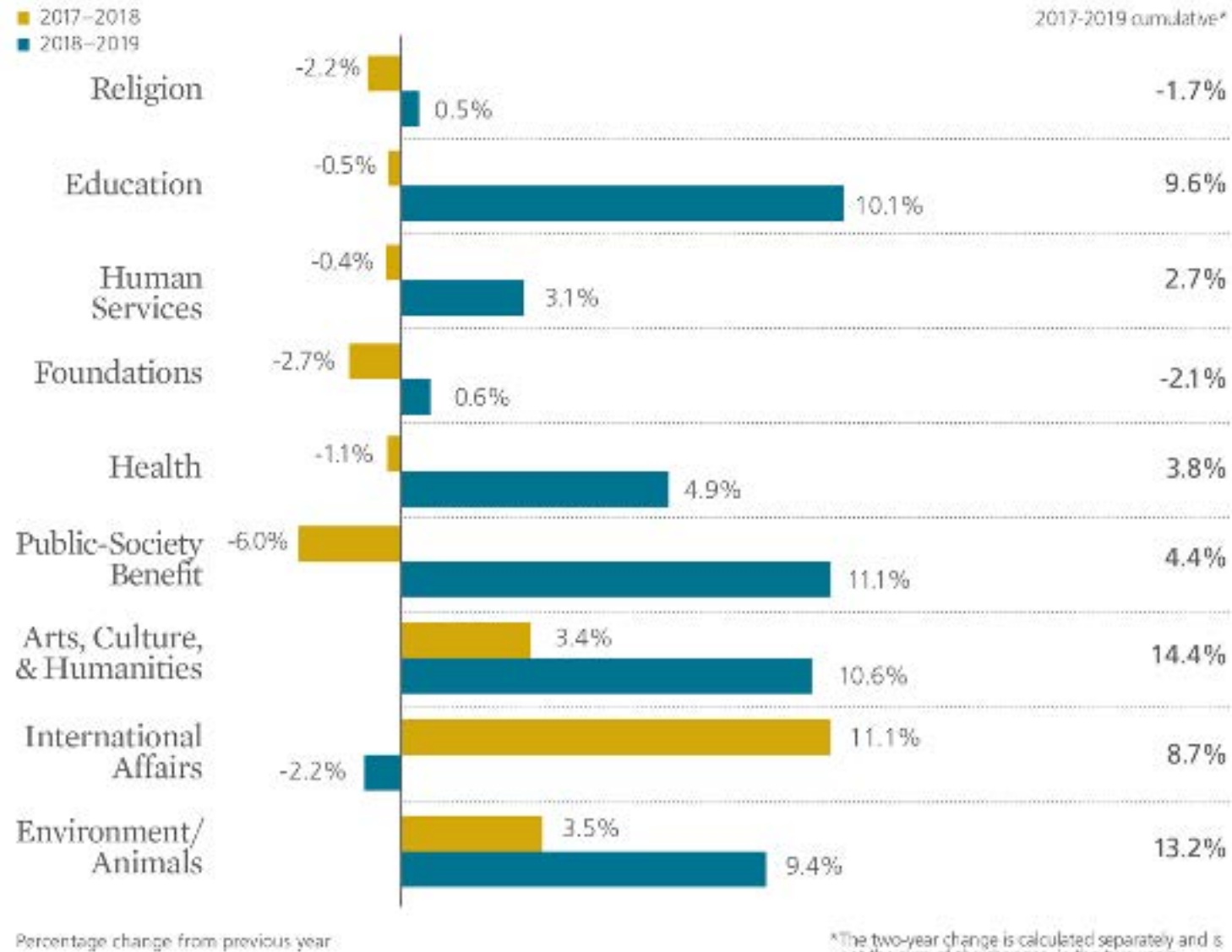


Individual giving as a share of disposable income, 1979-2019

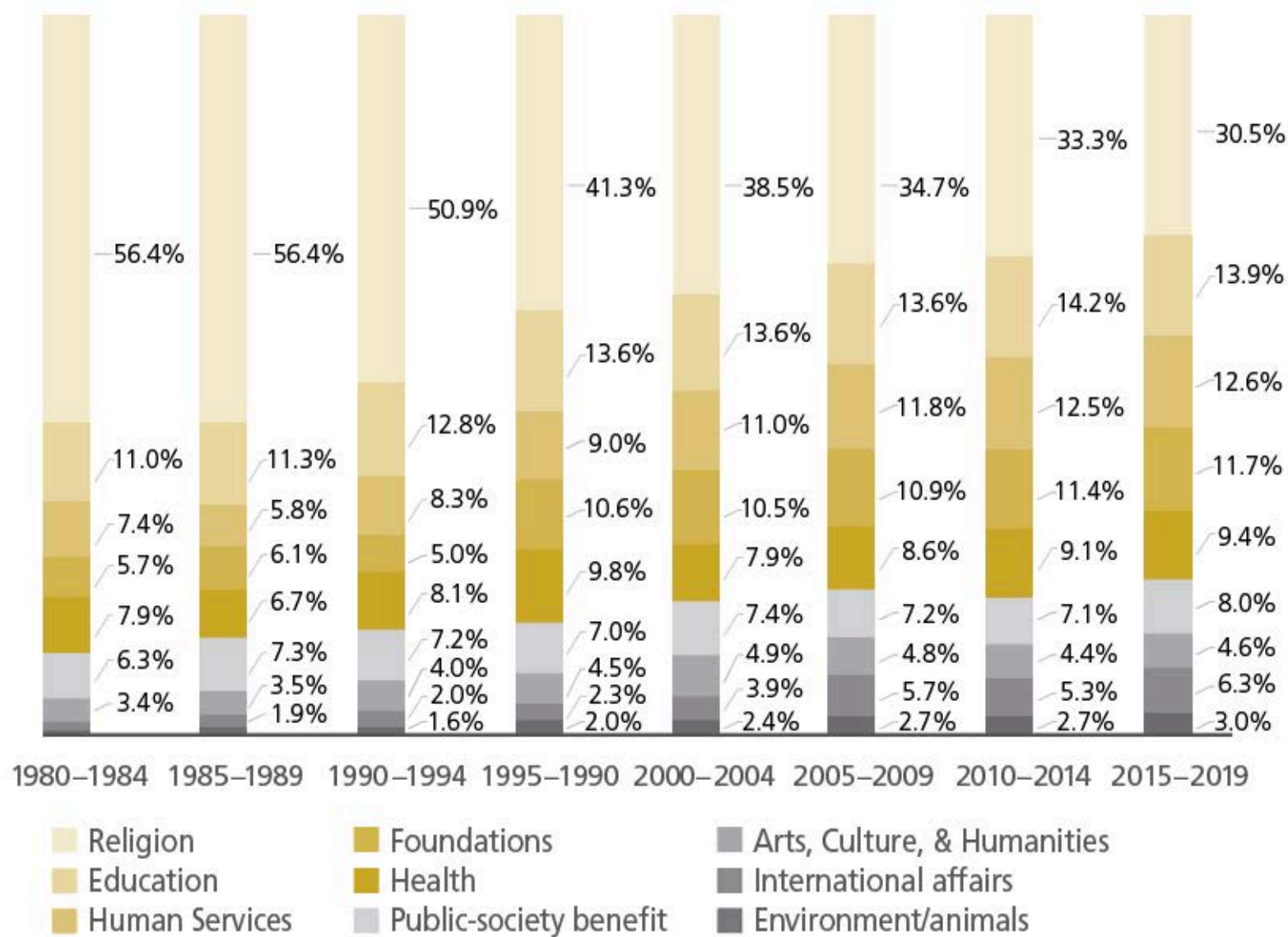
(in current dollars)



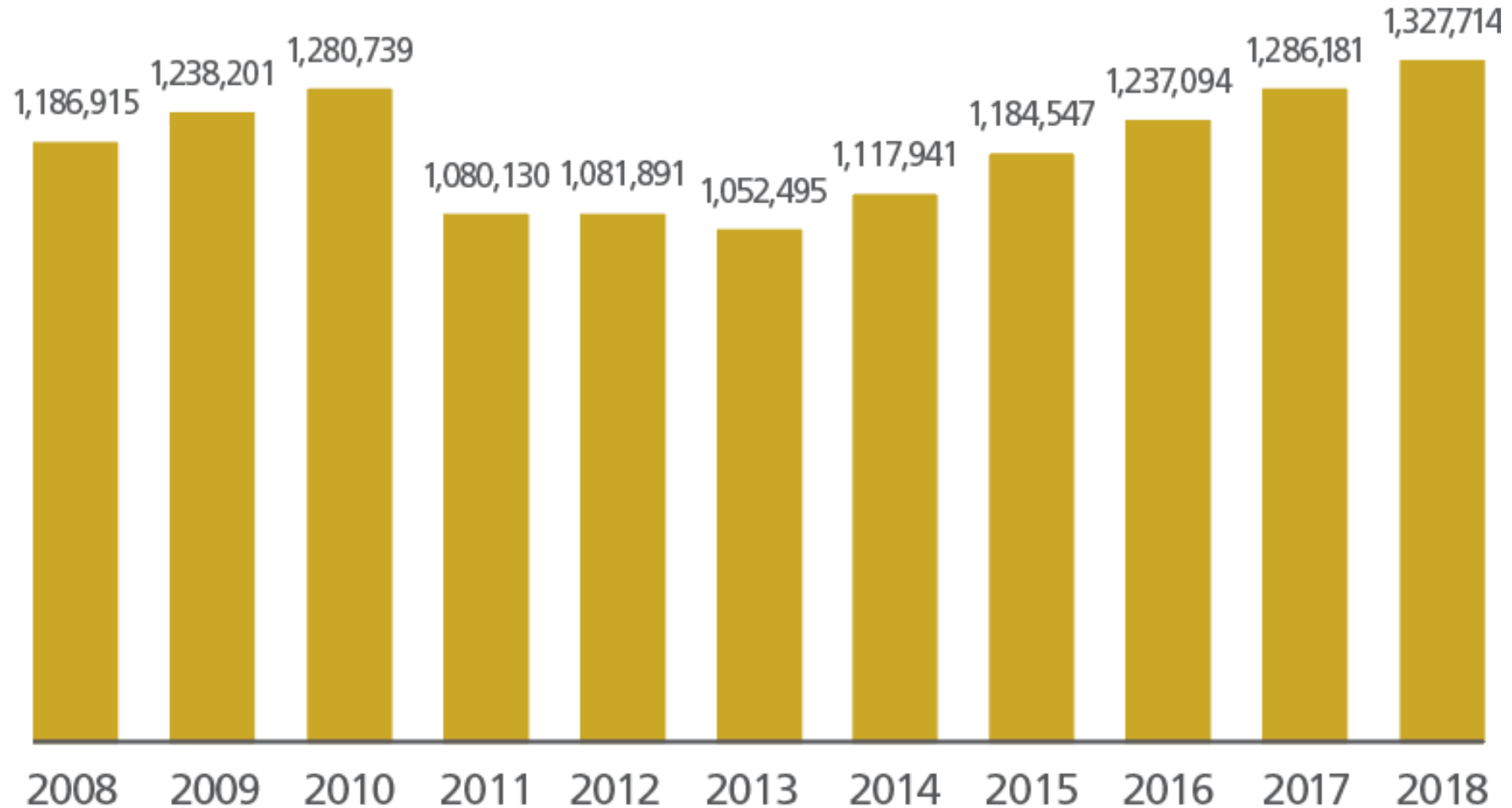
Changes in giving by type of recipient organization: 2017–2018 and 2018–2019, 2017–2019 cumulative (in inflation-adjusted dollars, 2019 = \$100)



Giving by type of recipient: percentage of the total in five-year spans, 1979–2019 (adjusted for inflation, 2019 = \$100, does not include “unallocated”)



The number of 501(c)(3) organizations, 2008–2018





What Remains True

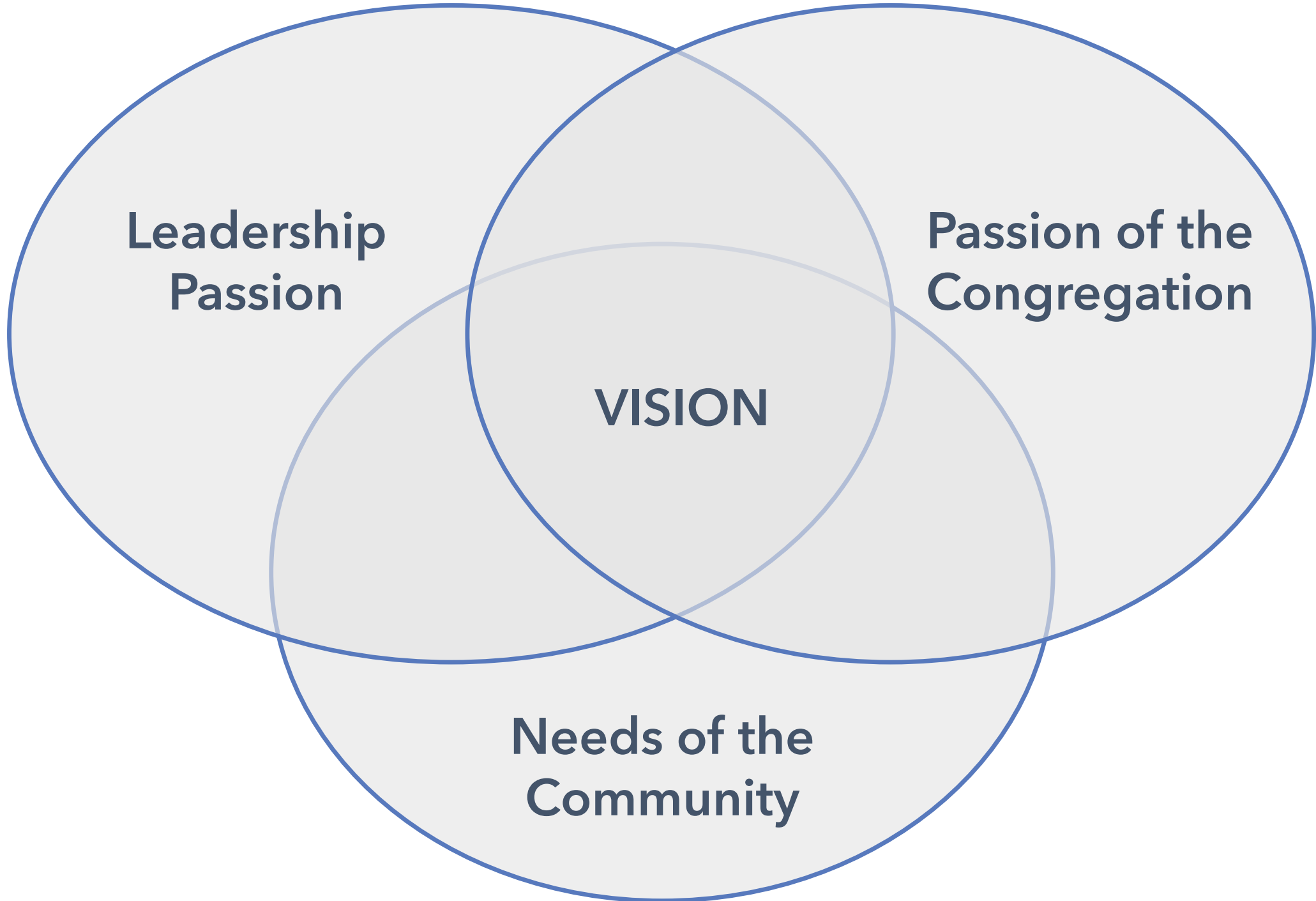
- We were born to be loving and giving (John 3:16)
- Generosity is a journey grounded in gratitude, revealed through prayer, and lived in faith
- Generosity is part of our journey as Christ followers

Five Disciplines for Growing Generosity





What are you
uniquely called
to do to
further God's
mission?

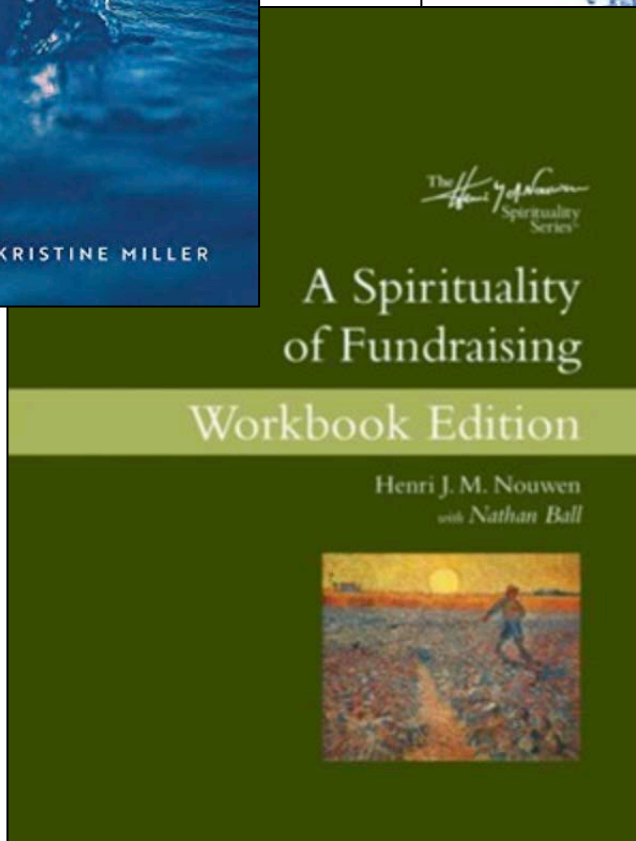
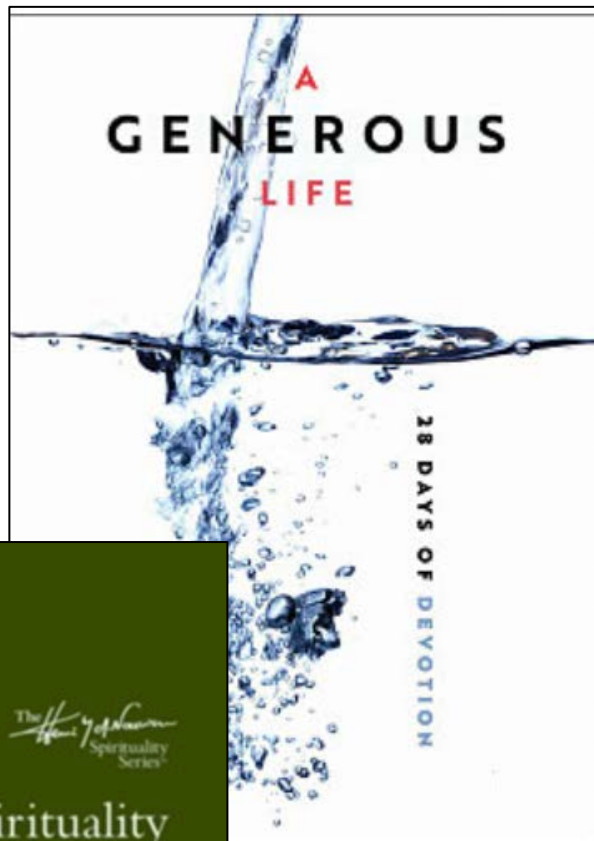
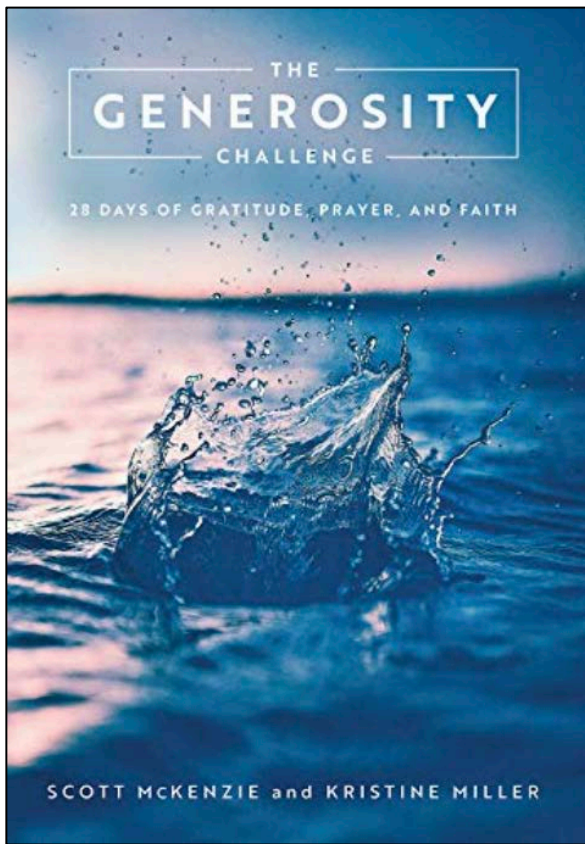




Keep It Spiritual

Discipleship is the foundation of any generosity initiative.

- Preaching and teaching generosity year-round
- Stewardship, giving and generosity are part of Christian Formation
- A clearly articulated Generosity Statement
- Prayer is integral to generosity emphasis
- Gratitude, Prayer, and Faith are cornerstones of the journey



- Prayer Emphasis
- Devotional Book
- Christian Formation classes
- Bible Studies



Break



Your Questions and Comments



Tell Your Ministry Story

Effectively communicating how you are transforming lives cuts through what the culture has to say about money.

- Weekly Offering Talks
- Frequent use of storytelling in all church communication
- Focus on one life at a time
- Share the stories of those impacted by your ministries and those who are transformed because they shared their time and money

Inside this statement, there is love.

Inside this statement there are hundreds of stories. Inside this statement there are grandparents comforted, parents educated, children loved, families fed, faces covered, loved ones celebrated, neighbors surprised, strangers befriended, faith strengthened and HOPE poured out. Inside this statement is a list of your generous actions; actions that connect and care for this community every single day. Thank you.

- Worship
- Giving Statements
- Thank you's
- Website
- Videos

More than 3,000
worshipped online
last week!





TRINITY EPISCOPAL CHURCH

Sunday, AUGUST 16, 2020

10:00am

MORNING DEVOTION

Faith



Build Donor Relationships

The church's relationship with its financial supporters is sacred and requires careful tending.


- Rector uses donor giving records to cultivate relationships and invite into ministry opportunities
- Church thanks more than asks—Prompt, Personal, Powerful
- Donor-centric gratitude expressed to Ministry and Financial leaders
- Every gift counts. Every giver is important

In a you OR me world, reciprocity and collaboration don't fit. A you AND me world is full of collaborators, partners, sharing and reciprocity. In that world, our resources are not only enough they are infinite.

The Soul of Money
by Lynne Twist

Building Donor Relationships includes:

- Clergy knows the giving list, levels of investment and philanthropic objectives.
- Financial and ministry leaders are engaged often in discussions and decisions around ministry opportunities
- Knowing the minds of your donors and what they want to accomplish through your church
- Writing prompt, personal and compelling thank you's



A Typical
Thank You
Note

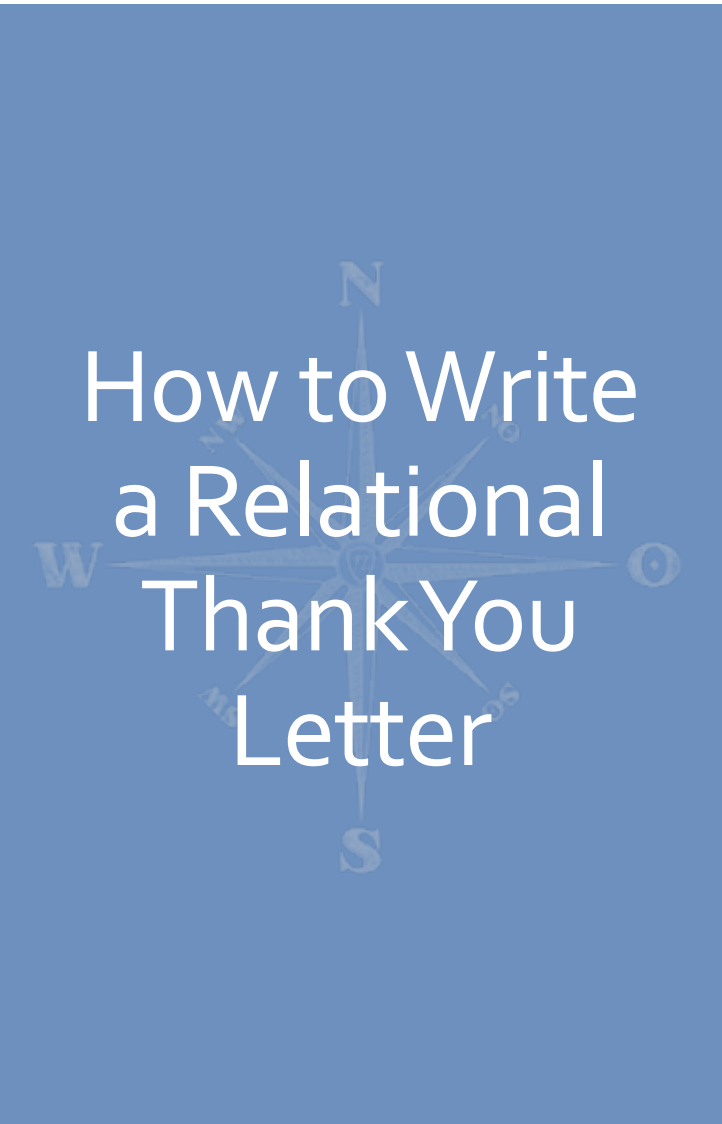
Dear Member,

Thank you for your recent pledge payment of \$1000. Support from donors like you is critical to our work.

This has been a particularly challenging financial year and we are running a deficit into the summer months. I hope you will consider participating in our special summer slump appeal to enable us to continue throughout the summer.

Sincerely,

Beverly Reid
Business Administrator



How to Write a Relational Thank You Letter

Dear Kristine,

I wanted you to know how much St. John's youth group has meant to me. I was fortunate to be able to go on the Nicaragua mission trip. While I was there, I realized how God was nudging me to study medicine so I could help people in countries where medical help is needed. Because of St. John's, I am now entering into the pre-med program at University of Michigan.

Thank you for your generosity and support of the youth program. You have made it possible for me to find God's purpose for my life.

Sincerely,
Amy Logan

Kristine,

I got notice of a gift from you to WCC!

That's amazingly generous of you to make a gift. Thank you.

It's been so meaningful to connect with new people from near and far—one of the few good things to come of this whole mess.

Consider joining my wife Sheila and me with other new friends tonight at 6:30 pm for a Quick Hello?

<https://zoom.us/j/145212957>

So, thanks again...stay in touch...be well...stay home...know that you are loved.

Peace,



Break



Your Questions and Comments



Make the Ask

People are most likely to grow their generosity habits when they are challenged to take their next step.

- Multiple ways to give: Annual, Special, Capital, Legacy
- Effective portals for giving: Website, Text, App
- Be clear about what you are asking, what the next step is and when you will follow up
- Personalize communication when thanking and asking. No “Dear Member”

Thank you for your support of

Here are the details of the transaction for your records...

Amount: \$25.00

Transaction ID: 9249775

Date: April 13, 2020 at 9:19:11 AM (EDT)

Payment Type: Visa ending in XX00

Personal Information

Ms. KRISTINE Miller

24594 Redwing Drive

Novi, Michigan 48374 US

(248) 231-1158

kmiller@horizons.net

Anonymous: No

Billed Transaction Details

One-Time

Restriction: Annual Giving Campaign

Billing Information

KRISTINE Miller

24594 Redwing Drive


Novi, Michigan 48374 US

(248) 231-1158

kmiller@horizons.net

Thank you for your support of



 notifications@accessacs.com <notifications@accessacs.com>

To:  Kristine Miller

Your contribution has been processed!

Receipt #: 542717816

Contribution Date: 4/23/2020

Payment Amount: \$10.00

Account Description: Visa ***9200

Payment Type: Credit

Account Number: ***9200

Details:

Pledge/Operating Budget: \$10.00



Measure Effectiveness

Connecting every dollar given with impact will increase trust and encourage future giving.

- Key giving metrics
- First-time giver strategy
- Lapsed giver strategy
- Measure movement of parish giving levels

- Financial Dashboards (Tools4Church.com)
- Annual Markers:
 - Mean (Average)
 - Median
 - Mode
- Strategies based on donor behaviors such as first-time and lapsed givers



YTD Household L.A.R.C.
(Loss, Acquisition, Retention, Change)
 Jan 1, 2019-Aug 19, 2019 vs. Jan 1, 2020-Aug 19, 2020



Prior Year

Next Year



Where to
Start—
Putting it all
Together

- Choose one or two strategies to implement this year
 - Devotional book and/or prayer emphasis
 - Offering talks
 - Donor-centered thank you notes
- Track your mean, median, and mode for 2019 and 2020
- Early 2021, plan out the year using the 5 Disciplines



Bonus— Gratitude Offering Fall Appeal

- 1) Video highlighting Calls to fellow parishioners, serving the community, drive-thru Eucharist, etc. Ask people to consider all the things for which they are grateful—especially this season all the ministry that's been happening during COVID.
- 2) Plan to share video with every household, in worship, and on your website
- 3) Send a letter from the Rector with a self-addressed, stamped envelope and ask people to honor someone they are grateful for through a gift to the church. Make sure there is an online option and a special Gratitude Offering box to check for their gift.



Bonus—
Gratitude
Offering Fall
Appeal

- 4) Mail appeal letters early October (maybe coinciding with Blessing of the Animals)
- 5) Create a gratitude wall on your website, list, or other acknowledgement of all the ways in which gratitude was expressed through the offerings to your church.
- 6) Enlist a team of people to make phone contacts to all current contributors to follow up on the appeal letter. Ask, “During this time, what are you most grateful for?”



Kristine Miller
kmiller@horizons.net



Scott McKenzie
smckenzie@horizons.net



Terry Goolsby
tgoolsby@horizons.net

giving365

www.giving365.com