



YEAR-END GIVING: PLAYBOOK



COMMUNICATIONS

United Methodist Communications

THE UNITED METHODIST CHURCH

FOREWARD

Dear Family Members of The United Methodist Church,

As we begin a new year together in our spiritual journey, it's important to pause and think of all the opportunities we have in the various ministries of our church. Because of the passion and desire to serve Jesus, this booklet produced by United Methodist Communications provides many practical ideas, strategies and timelines for inspiration. We start with prayer, for only God can build and create our success stories.

What are your dreams? What are your hopes for those who will come after us? We have so many opportunities with the many, many gifts God gives us. My advice for this playbook is to start at the end. Plan your celebration first, for we need to celebrate all that God does for us and through us. We need to be a thankful people. Use the appendix and worksheets, the graphics and then the stories. Look at a playbook as a chance to play with new ways to approach giving and stewardship.

Don't just tell your story. Tell God's story. Build relationships. Say "thank you" in all circumstances and express gratitude. We live in a global community, and the purpose of our connection is to change the world for Jesus' sake. My prayer is that all the ways we give will lead to sharing and showing Jesus' love to others. Celebrate a playbook that lets you know you are not alone. You have help through God and through us all. God bless your adventure in giving and growing with giving and growing more!



Phyllis M. Bowers

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INTRODUCTION

If you have been around ministry for any amount of time, I am sure you are no stranger to the big push for giving at the end of the year. Either you have been the pastor sharing giving opportunities and needs from the pulpit, or you have been the church member sitting in the pew listening to the giving sermon.

Regardless, the subject of “year-end giving campaigns” is not a new one for you.

When you choose to embark on a giving campaign at the end of the year, you are entering a very crowded “marketplace.” You are also competing against consumerism, an obsession with buying material things and the concept where people believe they must purchase items whether for personal indulgence or to keep the economy afloat.

These individuals are often pressured into buying needless, extravagant things all in the name of “finding the perfect Christmas gift.”

As Christ-followers, we are recipients of the free gift of salvation, and as we experience this generous gift from God, we can give to others generously. There is a transformation of our souls when we give graciously and generously, when we pay forward the grace and generosity we have received.

The following is a year-end giving blueprint to help you enter that crowded “marketplace” and communicate to your members in a way that is encouraging, exciting and a life changing, life-giving experience for all involved.

Your year-end campaigns will provide:

1. an opportunity to influence the consumerist impulses with a biblical, grace-based generosity message;
2. an opportunity for you to communicate your vision for the year and to build momentum going into the new year;
3. an opportunity to focus ministry efforts on felt needs...
 - a. within your congregation (building expansion, new roof, quality equipment for the children’s ministry, new outreach ministry, etc.),
 - b. within your local community (a local ministry serving the homeless, the disenfranchised, the underprivileged, etc.),
 - c. within your connectional ministry efforts (a clean water project, missionary support, human trafficking efforts, etc.).

WHY SHOULD WE DO THIS AT THE END OF THE YEAR?

Our congregations are used to hearing giving messages; they are used to giving opportunities in general.

As mentioned before, the end of the year is a crowded space. It can be easy for your church's giving opportunities to get lost in the year-end chaos, and it may be tempting not to address giving opportunities at all, waiting until a time of year when you do not have as much commotion in the same space.

The way to life change is through generosity, and much of our natural generosity happens at the end of the year.

Why is this?

1. The end of the year signals end-of-year taxes, which means contributions to your church can improve a taxable-income situation for givers in your church. For many, this is a major giving incentive.
2. One's income may change or vary greatly throughout the year. Year-end bonuses or checks may be the bulk of income for the year.
3. Many givers wait until the end of the year to tithe when final acknowledgements and accolades come from clients and employers.

Regardless of the reason, end-of-year giving is crucial to your budget. In fact, the months at the end of the year are the most charitable, with December being the largest giving month for most churches.

A recent survey from Giving USA found that 50 percent of "big-gift giving" happens from October through December, with 25-33 percent of all charitable giving occurring in December.

It is clear that generosity and giving in our churches is not a lost cause! In fact, a recent survey from "Giving Rocket" noted that 86 percent of churches meet or fall just below budget!

What does that tell us? It tells us that churches are growing and thriving in today's landscape. Giving is a core value of many individuals in your congregations. Church vitality is tied to communicating your vision for ministry.

A thriving church will use the natural giving instincts at the end of the year as a way to focus ministry and build momentum.



A successful year-end campaign starts in the autumn, ideally in the last three or four months of the year.

HOW DO I PLAN MY YEAR-END GIVING?

This campaign will be something you plan a season in advance – maybe as early as the summer, maybe even in the spring. It all depends on your schedule and what makes sense for your congregation and staffing.

Not everyone is on the same schedule, so it's OK to start, even at the end of the year.

We want this resource to give you enough ideas and frameworks so that everything makes sense, given the time you have to devote to this.

We want this resource to excite you and your staff about the tangible impact in your community's participation in giving and generosity.

Here is an outline to get you started. We have included an appendix at the end of this resource with more details.



PHASE ONE: DISCERN, IDENTIFY AND RESEARCH

October is ground zero of your year-end giving campaign. Ideally, you'll be assessing and identifying needs all year so by the start of the last quarter, you'll have a great launching pad to determine the right focus for the last giving campaign of the year.

Start by identifying, from your own viewpoint, the major needs of your church.

Is the roof leaking? Are there no more parking spots on Sunday? Are you running out of room in the children's areas? What have you and your senior leadership identified as crucial needs for the growth and vitality of your church?

Next, invite your staff into the conversation.

Do they agree with your assessment? What needs have they identified in the areas for which they are responsible? Are they passionate about a particular local ministry? You can do this as a brainstorming session, or by using visual elements. Start a Google Docs team, a staff survey or a Dropbox folder where your team can share their initial thoughts and needs.

Then, when you have all the information readily available, narrow the focus of your campaign into the following three segments:

1. Church advocacy (felt needs within your church),
2. Local advocacy (felt needs within your community),
3. Global advocacy (felt needs within the connectional community).

By categorizing giving opportunities into three categories, you allow your church members an opportunity to resonate with a message, supplying them with several reasons to give.

This also allows you to focus your church giving toward the ministries and the needs most closely resembling your "church's DNA."

When we raise awareness for our internal needs, we are offering givers an opportunity to contribute where they will see immediate results.

This can be especially significant for new givers.



Here are some examples of church advocacy:

- Building maintenance
- Building expansion
- A new campus
- New equipment for worship, children, hospitality, etc.
- Staff expansion

Let's talk about local advocacy

When we collaborate with local ministries, we are offering givers an opportunity to experience real change within their own communities. Local ministries and charitable organizations are already positioned to influence their public and can be catalysts for change in their area of focus.

Quite honestly, local ministries can accomplish things in the community, where the church, on its own, cannot. Moreover, when we become giving partners with a ministry, we naturally cultivate volunteer opportunities in which our members can engage with their families, small groups or on their own.

A mobilized church can effect real change in their community, and that change often starts with giving. Some examples of local ministry giving opportunities are:

- ministry that serves the homeless,
- food drives,
- ministries that help the disenfranchised (single parents, unemployed, teens-in-crisis, etc.).

What about global advocacy?

When we advocate for connectional ministries, we are recapturing the mission of our church.

It can be so easy for us to lose sight of the church's global mission and vital global presence, so easy to become hyperfocused on our own needs.

As part of our missional imperative, we want to recognize that it is God's mission for us to reach the world, to change the world.

We want to awaken our members' awareness of the connectional needs, and we can do that by providing giving opportunities.

We can provide effective engagement and life change when we give and support a mission as a church community. We have already established many connectional giving opportunities within The United Methodist Church.

Here are a few ideas for global advocacy:

- The Advance,
- Apportioned funds,
- Special Sunday funds (Student Day, One Great Hour of Sharing, Native American Ministries, Peace with Justice, World Communion Sunday and Human Relations Day).

PHASE TWO: MOBILIZE AND ENGAGE

Phase Two is the time to engage your core community.

This can include your senior leadership, your team leaders, your most faithful and passionate volunteers and givers, your highest influencers, etc.

First, start a prayer chain calendar. Produce a way in which people can sign up to pray for the giving campaign every day throughout the end of the year. You can do this with electronic tools or traditional tools.



Below are three examples of electronic scheduling tools:

- Google calendar
- SignUpGenius
- Doodle

For a universal approach, Facebook can be invaluable. Create an event on Facebook that runs from Nov. 1 to Dec. 31 and invite people to attend.

As a reminder, the event will “live” in the notification section of each invitee during the entire span of those dates. You can also post status updates promoting the importance of prayer.

If you’d like to use a more traditional approach, print a sign-up calendar with all of the days left in the campaign and invite people to sign up before or after services. We’ve included an example of this at the end of this resource for you.

In addition to providing a place for people to sign up to pray, it is important to have in-person events, or something that might be called “vision events.” Choose two to three dates at the end of the year to pitch the vision for the upcoming year to your high-capacity donors and leaders.

Vision events should provide an intimate atmosphere, sharing the direction of the church for the upcoming year. Include a designated time to celebrate where your church is going and a time allotted for attendees to ask questions.

This can be an incredible way to organize your givers before the public launch of your ministry.

Take advantage of this in-person event (AKA “vision event”) to identify three to five core campaign opportunities and ask for champions/advocates for each of them. Connecting at this level heightens awareness within your congregation and provides an opportunity for peer influence toward generosity.

Make sure you invite people to plan their giving by providing commitment cards to the participants. Commitment cards will help people quantify and earmark their donation. This not only helps families and individuals plan their year-end giving; it also helps you with your year-end budget planning!

Going into the Thanksgiving season is the perfect time to talk about your year-end campaign.

Many churches host United Methodist Student Day during the Thanksgiving season. This is the perfect time to talk about United Methodist Student Day in a way that shows that giving isn’t a binary decision.

In fact, in stewarding our resources, in cultivating a generous heart, we can thoughtfully and intentionally direct giving to several funds. This kind of giving bears fruit in multiple ways.

Student Day is just one way that our church demonstrates God’s love as “outward” and “future forward,” not just “inward.”

So, as you set about announcing your year-end giving campaign, it is important to be intentional. Leadership starts in the pulpit.

Let your members know how excited you are to teach about generosity, to talk about stretching our faith. Take some time to highlight needs in the community and share how your church will be a part of meeting those needs.

We need to use a pivotal Sunday at the end of the year (Thanksgiving Sunday, for example) to talk about how generosity is a life-altering opportunity and experience and how it stretches and improves our faith.

These announcements are a powerful stepping-stone into Phase Three.

PHASE THREE: THE LAUNCH AND RECURRING MESSAGE

Phase Three is a good time to start discussing your campaign from the pulpit in more than just announcements.

You might choose to do a message series, or to do this as a recurring announcement/update series before the offering or message.

Regardless of the way you decide to talk about this, recurring messaging is very important. Talking about internal, local and global giving opportunities gives us the chance to consider our purpose as a missional community.

We want our members to know just how important it is for us to affect the community around us.

This time at the pulpit is devoted to building momentum.



Here are some ways to build that momentum.

- **Talk about why you went into full-time ministry.**
Talk about your personal story. Connect the dots in your life about how your decision to dedicate your life to ministry is also a response to gratitude for the generous gift of salvation. Are there any examples in your personal life, relationships or career that can share how generosity has been instrumental in your life?
- **Talk about the legacy of this church.**
When we talk about giving, we are talking about our legacy. What changes will be effected because of our gifts, because of our generosity? Let us identify what kind of legacy we want to leave as a church.
- **Talk about the upcoming year and the different categorizations of giving you have identified.**
Share the outlets you have identified at the internal, local and global level. Talk about the reason(s) why your church chose your individual giving opportunity for the year ahead, how it ties into the mission of the church and what it means personally for members of your community.
- **Invite your church to become a part of a giving revolution, to become catalysts for change, to become generous, to become life changers. We are a community of believers, and we want to create change!**

SERMON or ANNOUNCEMENT SCHEDULE

Thanksgiving Sunday

- Talk about how generosity is a life-changing opportunity and how giving stretches and improves our faith.

December Week 1

- Giving Tuesday
- Share several opportunities for your members to give/be generous.

December Week 2

- Share generosity stories from your life and your congregation.
- Share stories of change from the organizations you've chosen to support.
- Share internal statistics.

December Week 3

- Talk about gift giving
- Focus the season from "Consumer Season" to the real reason for the season.

December Week 4

- Merry Christmas!

First Sermon of the Year

- Focus on the new year ahead, celebrate the Generosity Campaign with some broad stats, Save analytics for end of January.

Here are what sermons during the last month of your campaign (likely in December) might look like:

Week One: Pre #GivingTuesday Sermon

- Share three non-church charity options that are in line with your year-end campaign values.
- Share an opportunity to support your own campaign.
- Make it easy for people to donate.
- Send a community email sharing the giving opportunities and the “why” behind each one.
- Begin posting on social media.
- Provide an e-book or guidebook explaining the giving opportunities on your website and Facebook page.

Week Two: Story Sharing

- Share your own generosity story.
- Share generosity testimonials from church members.
- Share stories about change from the organizations you have chosen to support.
- Share internal statistics: 100 percent of our staff have already committed to giving XX% percent toward our goals. Join the movement!
- Share stories of leaders stepping up within your church. Talk about why they are excited about the cause they have adopted or the one which they are advocating.
- Send a community email after the message, summarizing the giving opportunities and provide links so members can click and give.

Week Three: Christmas Gift Giving

- Talk about the idea of gift giving.
- Talk about examples of gift giving in the Bible.
- Talk about the spirit of generosity and God’s generosity to us.
- Borrowing from an old adage, spend time focusing on the real “reason for the season” instead of the hyped commercialized season.

Week Four: Merry Christmas

- Christmas is here. Christ is our Gift!

Last Week of the Year

- Focus on the new year and be thankful for what these generous donations will allow your congregation to accomplish.
- Every day this week, get your message across on social media and remind your congregation to take advantage of the links provided that enable them to give electronically.



PHASE FOUR: THE CELEBRATION

One of the things we cannot forget is to celebrate the generosity of our congregation! Use the month after your campaign to analyze internally and celebrate publicly.

On the first Sunday after the campaign, reflect on the year ahead. Thank everyone for their gifts, celebrate the stretching of our faith and the raising of awareness for felt needs within our community and share any immediately available statistics or testimonies.

For example, you might say, “We heard from our contact at the local food drive and he told me this is the first year he did not run out of food the day after Christmas. He wanted me to thank you for giving so generously.”

As a team, during the first weeks after your campaign, you need to allocate time to assess the success of your campaign.

Here are some questions you might ask yourselves:

- How did the congregation respond to the messaging?
- How much did we raise?
- What were the most effective messaging tools? Facebook, Twitter, email, etc.?
- What were the most common questions we received?
- What did we learn?
- What did we do best?
- What should we change next year?
- What feedback was shared from our members? Do we need more?

During the fourth week after the campaign, set aside time before your sermon to give a “State of the Church” address and share the results of the giving campaign.

There is no need to itemize each line; approximate numbers are fine.

Here are some guidelines you might use for sharing:

If you did not reach some of your goals, tell how much of the goal you did reach and how much further you have to go.

Show a time line for progression – how soon will the congregation actually “see” the changes made in your church?

Provide a feedback loop (a telephone number or an email address) for people to use if they have questions.



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