The Rev. Canon Jason D. Lewis
Canon for Congregational Vitality

190th Diocesan Convention Workshop
Diocese of Kentucky
Simon Sinek - “Start with Why” - How Great Leaders Inspire Action

The Golden Circle
Starting with Why

What makes Apple different than other computer companies? Why do they have a cult following?
NO:
What: We make great computers.
How: By proprietary processes with quality materials and smart programmers, by making user-friendly products.
Why: Want to buy one?
Starting with Why

YES:
Why: We believe in challenging the status quo. We believe in thinking differently.

How: The way we challenge the status quo is by making our products beautifully designed, simple to use, and user-friendly.

What: We make great products. Want to buy one?
Starting with Why

YES:
Why: We believe giving of oneself financially unlocks a part of our hearts where God can do incredible work, both in us and through us.

How: We collectively change ourselves, our Church, and world by helping people give their money away.

What: Project Resource provides the tools to inspire radical generosity. Join us on the journey of changing a culture of stewardship in The Episcopal Church.
Starting with Why

What is our Why?

1. Use "Why" to think about your church
2. Incorporate "Why" into every donor interaction
3. Tell stories… over and over and over
Starting with Why

Incorporate Why into every donor interaction

• Invitation to Worship
• Invitation to Give
• Invitation to Serve
Starting with Why

Use Why to think about your church

• Values (why we do it)
• Ethos (how we do it)
• Practice (what we do)

People don’t give to your church because you do church. They give because they’ve connected with your mission. NOT your mission statement. Because you’ve communicated the Why of why you exist.
Starting with Why

Why invest the time/energy/resources in stewardship/development in your own diocese/congregation?
Each generation has unique characteristics that make its members more likely to support different causes. When you understand the behaviors of each generation, you can communicate in a way that resonates and secures their support.
Generational Characteristics

- **Matures**: Born 1945 and earlier
- **Baby Boomers**: Born 1946-1964
- **Generation X**: Born 1965-1976
- **Millennials**: Born 1977-1995
- **Generation Z**: Born 1996 and later
Generational Characteristics

Some quick definitions:

“Generalizations make sense when talking about thousands of people, but not when talking about one person---the person you know. Applying a valid statistical generational characteristic to one person is stereotyping.”

Haydn Shaw
Births Underlying Each Generation

Number of U.S. births by year and generation

Source: U.S. Dept. of Health and Human Services National Center for Health Statistics
PEW RESEARCH CENTER
Ecclesiastes 7:10

- NASV: “Do not say ‘Why is it that the former days were better than these?’ for it is not from wisdom that you ask.”
- NRSV: “Do not say, ‘Why were the former days better than these?’ For it is not from wisdom that you ask this.”
Generational Characteristics

Post-Election Emerging Data

- Non-Profit Quarterly 2016: “New Form of Donor Motivation: Rage”
Generational Characteristics

Episodic or long-term shift?
The Challenge: Relevance

- Large institutions which do not articulate their values face the challenge of not connecting with donors’ values within in a shifting fundraising landscape.

- Social justice/advocacy groups are seeing unprecedented giving.

- *What did you experience* – giving, pay attention to your values and issues of interest in a new way?
Fundraising is a Ministry

“From the perspective of the gospel, fundraising is not a response to crisis. Fundraising is first, and foremost, a ministry.”

A Spirituality of Fundraising
Henri Nouwen
The Greatest Generation
Born before 1930

- Defined by Great Depression, WWII, Patriotism
- Loyal to the Church, Strong sense of obedience
- Trust government and authority
- Often make the “converted” group
Generational Characteristics

Subset of TGG: The Silent Generation
Born between 1930-1945

• Defined by Cold War, rising prosperity, a willingness to sacrifice
• Value loyalty, conformity
• Married early. Set up the Church as we know it.
• MESSAGE: Legacy (You built this!)
• STRATEGY: Most are converted- visit from authority figure
Generational Giving

Matures
Born 1945 and earlier
AKA "Greatest Generation"

26% of total giving

24% volunteer rate

11% donate to human rights causes

60% donate
51% volunteer

Religious & spiritual causes
Generational Giving

Top Supporters of

- **Emergency Relief**
- **Troops & Veterans**
- **The Arts**
- **Advocacy & Election Campaigns**

**the Matures**
Born 1945 and Earlier

AKA
"Greatest Generation"
The Baby Boomer Generation

Born between 1946-1964

- Defined by idealism and freedom of 1960’s
- Highest divorce rate and 2nd marriages in history.
- Reject establishment and routines
- Self is more important than the group
- Need information on impact/how gift will be used
- Must have transparency in light of mistrust of institutions
Generational Characteristics

The Baby Boomer Generation
Born between 1946-1964

• “The American Dream” was promised to them as children and they pursue it.
• **MESSAGE:** Prioritization of Charitable Giving
• **STRATEGY:** Narrative budget, lose language of obligation, Impactful story telling. Have ACTUAL recipients of giving speak, Appeal to their idealism. Could your parish be where they spend their “third age?”
Generational Giving

BORN 1946 - 1964

Baby Boomers represent 43% of total giving.

This generation has a 27.2% volunteer rate.

49% want to know about a nonprofit’s finances before they donate.
Generational Giving

Baby Boomers
Born 1946 - 1964

- 8% donate to human rights causes
- 48% donate
- 48% volunteer

Religious & spiritual causes
Generational Giving

Top Supporters of First Responder Organizations
How would your invitation to a Greatest Generation/Mature potential donor look different from that of a Baby Boomer?
Generational Characteristics

Generation X
Born between 1965-1976

- Defined by Individualism, Single parent households, seeker generation, Watergate, Energy Crisis, Dual Income families and single parents, First Generation of Latchkey Kids, Y2K, Energy Crisis, Activism, Corp. Downsizing, End of Cold War, Mom’s work
- Coupled later, entrepreneurial, cynical of authority
- The first generation NOT to do as well financially as their parents did.
Generational Characteristics

Generation X
Born between 1965-1976

- Will move or transition jobs 5+ times
- Wish to “experience” Church, though may not attend regularly
Generational Characteristics

Generation X

Born between 1965-1976

• Experience tied to giving
• **MESSAGE**: We are a people/community who care about each other. Put individuals in front of ministries.
• **STRATEGY**: Year round thinking on giving/don’t just focus on the fall, allow them to work independently for your agency and on their own terms.
Generational Giving

**Generation X**
Born 1965-1976

- Generation X represents 20% of total giving.\(^{16}\)
- This generation has a 30% volunteer rate.\(^{17}\)
  (Volunteers are 2x more likely to donate)

**Generation X + Millennials**
WILL INHERIT OVER $40 TRILLION\(^{15}\)

- 9% donate to human rights causes.\(^{18}\)
- 38% donate
- 30% volunteer\(^{10}\)

**Religious & Spiritual Causes**
Generational Giving

Top Supporters of

- Health Services
- Animal Rights & Welfare
- Environmental Protection

Generation X
Born 1965-1976

• Are there strategies that work... with a different audience?
How would your invitation to a Generation X potential donor look different from that of a Baby Boomer?
The Millennial Generation
Born between 1977/80-2000

- Defined by being children of divorce, celebrate diversity, socially conscious, Digital Media, child focused world, school shootings, terrorist attacks, AIDS, 9/11 terrorist attacks.
- Parents are advocates and friends
- Givens: DEBT! And technology
- Pew research claims giving characteristics are similar to greatest generation
The Millennial Generation
Born between 1977/80-2000

- First generation of children with schedules.
- Require mentorships/relationships to affirm decisions
- **MESSAGE**: Your gift is important and will impact lives. Now, how can we get to know you?
The Millennial Generation
Born between 1977/80-2000

• 83% own a smartphone and the majority prefer mobile-friendly websites.
• 59% prefer news or action-oriented websites with quick informational links.
• 49% are more likely to give when they know how their gift will make an impact.
• 57% like emails that contain a calendar of upcoming events.
The Millennial Generation
Born between 1977/80-2000

**STRATEGY:**
- Immediate gratification of giving,
- online community presence
- online stories of impact.
- Use them for focus groups, ask their opinions.
- Put them in charge of using technologies for appeals-no long appeal letters
- Utilize their networks-have them plan events that interest them.

* “Mid Century Modern” is cool again.*
Generational Giving

**Millennials**  
BORN 1977-1995

- **21.7% of Millennials Volunteer**
- **11% of total giving**
- **18% donate to human rights causes**
- **32% donate**
- **24% volunteer**

[Image of a young man with a beard and an infographic representing generational giving statistics.]
Generational Giving

Millennials
BORN 1977-1995

Represent over a 1/4 of the US population (and now surpass Baby Boomers in size).

84% of Millennial employees donated to a nonprofit in 2014.
Generational Giving

Top Supporters of

- Human Rights & International Development
- Child Development
- Victims of Crime/Abuse

Millennials
Born 1977-1995

21
Generational Characteristics

What’s Next: Generation Z/Boomlets
Born after 2001

- In 2006 there were a record number of births in the US and 49% of those born were Hispanic, this will change the American melting pot in terms of behavior and culture.
- The number of births in 2006 far outnumbered the start of the baby boom generation, and they will easily be a larger generation.
- Since the early 1700’s the most common last name in the US was ‘Smith’ ----now it is Rodriguez.
Generational Giving

By 2020, they’ll make up 40% of all customers. 26% of those aged 16-19 volunteer.

60% want their work to make a difference.

76% are worried about the planet.

Generation Z
Born 1996 and later

“Aka Philanthrokids”
“What finally brought me back, after years of running away, wasn’t lattes or skinny jeans; it was the sacraments. Baptism, confession, Communion, preaching the Word, anointing the sick — you know, those strange rituals and traditions Christians have been practicing for the past 2,000 years. The sacraments are what make the church relevant, no matter the culture or era. They don’t need to be repackaged or rebranded; they just need to be practiced, offered and explained in the context of a loving, authentic and inclusive community. “

Rachel Held Evans
Root all Fundraising in the Why

“When fundraising is done right, the person asking and the person giving come together to participate in a new thing that God is doing.”

* A Spirituality of Fundraising
  Henri Nouwen
Different Types of Giving

**Annual**
- Funds operations
- Donor gives from cash flow
- Tied to daily mission & ministry

**Capital**
- Funds specific projects, often related to building
- Donor gives from assets
- Tied to future/growth of your mission

**Planned**
- Funds perpetual activities
- Donor gives from estate
- Tied to the continuation of your mission
Annual Giving: Planning

Best Strategy for Giving: Plan Before Fall!

• Planning should be done with measurable objectives.
• Where possible, list dates for completion and names of those who will move action items forward.
• It is both plan and archived so that new plans do not need to be re-invented by new leadership year after year.
What to do…

• Choose a leader (Tigger not Eeyore)
• Build a case for support (data gathering)
• Develop a theme (from that data)
• Plan a communications strategy (make a calendar)
• Preview the strategy in Spring (Spring, people.)
• Plan ingathering with a celebration
Campaign 101: The Campaign

What to do…

1. Final “thank you” of previous campaign
2. Inclusion of congregation in case development
3. Deserving the money
4. Metrics
5. Spiritual depth
6. Kick-off
7. Eight Weeks
8. Encouragement
9. Gift acknowledgement
10. Bold ending and ask
11. Communications
12. Celebration
13. Thank, review, and plan
Campaign 101: The Campaign

Who will do it…

Annual Campaign Chair

• Communications
• Case Development

• Vestry Recruitment
• Up to 5 people TOTAL
Who will do it…

Chair

- Hosted Conversations
- Communications
- Case Development
- Vestry Recruitment
When to do it…

- Create a calendar

<table>
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<tr>
<th>What</th>
<th>Who</th>
<th>When</th>
<th>Notes</th>
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<td>Jane and Jim Doe</td>
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<td>Rector will not be there.</td>
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<td>Church Secretary</td>
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Campaign 101: The Campaign

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### Campaign 101: The Campaign

#### When to do it...

- **Do something every day**

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<th>Sunday</th>
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<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
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<td>28  Preview VS’s and WOW cards during announcements</td>
<td>29  Invite 1 person to join Campaign team</td>
<td>1  Mention month of visioning at Bible Study</td>
<td>2  Pray for Committees at weekly prayer group</td>
<td>3  Print Wow Cards</td>
<td>4  Mention Project Resource during lunch with long time member</td>
<td>5  Visit church websites to look at their promotional material</td>
</tr>
<tr>
<td>6  Announce Wow Cards</td>
<td>7  Make a report to Vestry</td>
<td>8  Ask Joneses, Smith, Ruiz’s to host a visioning session</td>
<td>9  Pray for Committees at weekly prayer group</td>
<td>10  Invite 1 person to join Campaign team</td>
<td>11  Report on progress at Deanery</td>
<td>12  Hold a coffee for first time pledgers</td>
</tr>
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<td>13  WOW cards</td>
<td>14  Visioning Session</td>
<td>15  Invite 1 person to join Campaign team</td>
<td>16  Visioning Session (at Senior Home)</td>
<td>17  Mention pledging as part of confirmation curriculum</td>
<td>18  Check in with Coach</td>
<td>19  Ask for advice from Major Donor</td>
</tr>
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| 20  WOW cards  
Hold Youth visioning session | 21  Meet with Advance Campaign Fractel | 22  Visioning Session | 23  Pray for Committees at weekly prayer group | 24  Invite 1 person to join Campaign team | 25  Send a Thank You Note to VS hosts (and guests!) | 26  While jogging with Bishop, brag about your progress |
“The [new] system has met with unrivaled success because of its flexibility, accommodating itself to the diversified wants of the various congregations.”

How to Pay Church Debts and How to Keep Churches Out of Debt
- The Rev. Sylvanus Stall, 1881
Annual Giving: Resources

RESOURCES:

• Sample Annual Giving Calendar
• Sample Job Description
• Case for Support Development
• Ministry Moment
• Pledge Cards and Online Giving
• Sample Annual Giving Pledge Card
• Generational Giving