

## ***“Annual Campaigns That Really Work!”***

**National Stewardship Event**

**March 12-14, 2007**

**Reverend Dave Crittenden  
Co-Synod Executive  
Synod of Lincoln Trails**

**800-566-5996 (office)  
317-650-6325 (mobile)  
dave@lincolntrails.org (email)**

**Reverend Bob Sheldon  
Director of Funds Development  
Synod of the Rocky Mountains**

**970-577-0111 (office/fax)  
303-588-3409 (mobile)  
bsheldon@synodrm.org (email)**

### **Setting the Stage**

#### ***“The Spirituality of Fund Raising” – Henri Nouwen***

**([www.henrinouwen.org/home/booklet](http://www.henrinouwen.org/home/booklet) for free booklet)**

1. We are inviting people into a new way of relating to their resources – their gift is good for the ministry, and for their spiritual journey and spiritual health. “You will be enriched in every good way for your great generosity ...” (2 Corinthians 9:11)
2. Fund raising is a concrete way to help the Kingdom of God come about
3. Gratitude flows from the recognition that who we are and what we have are gifts to be received and shared
4. Fund raising in the church assumes abundance, is always grounded in prayer, and is undertaken in gratitude

#### ***The Continuum of Financial Gifts***

There is a Continuum of Financial Gifts along the financial discipleship journey. A congregation should encourage each type and provide resources to individuals moving along the continuum.

We can also use all five gifts to help support each one—think about it!

- 1) Impulse Gifts - giving from your wallet or purse
- 2) Annual Gifts - ongoing ministry of the church (often a pledge)
- 3) Campaign Gifts - special offerings, capital needs (usually a pledge)
- 4) Special Gifts - donor-selected ministries/missions
- 5) Deferred Gifts – often planned from accumulated wealth

#### ***Assumptions about Your Congregation***

1. Stewardship is the management of the household of God: *oikonomia*—Greek compound word (oikos = household and nomos = law or management)
2. Stewardship includes personal life, community life, public life and financial life
3. The congregational leadership (pastor and majority of Session members, at least) feels God’s amazing, all encompassing grace and is driven to respond in gratitude
4. The congregational leadership believes: “...God is able to provide you with every blessing in abundance, so that by always having enough of everything, you may share abundantly in every good work” --2 Corinthians 9:8
5. There is a group, task force or committee in your congregation given tasks associated with stewardship
6. The group of persons that serve on committee, task force or group with “stewardship” responsibilities each feel called to this work and willing to make personal commitments in the area of stewardship.

## ***Areas of Responsibility for your Committee, Task Force or Group***

1. Stewardship Education
  - a. For members of the committee and all members of the congregation—all ages
  - b. Inductive experiences rather than deductive experiences
  - c. Encourage pastor to make it a frequent part of sermons and worship experiences
2. Modeling Stewardship
  - a. Personal
    1. Share your story
    2. Commit to education as a student and a leader
    3. Commit to financial discipleship—pledge!
    4. Consider your part in environmental issues: global warming, recycling, etc.
  - b. Corporate
    1. Encourage the session to respond as we would like each of our members to respond: commit to education; responding to God's grace with extravagant generosity; give all our mission dollars off the top; etc.
    2. Invite the congregation's members to join the leaders in committing to stewardship education; responding to God's grace with their accumulated resources (the annual campaign to fund the operating budget); giving beyond themselves before they take care of any other expenses.
    3. Model good stewardship by using the church building to reach out to the community and fill needs in the community
3. Mission Interpretation
  - a. Provide and encourage "go and see" kinds of experiences for ministry and mission
  - b. Develop a Narrative Budget for your congregation
  - c. Publicize the Presbyterian Church (U.S.A.) Special Offerings: One Great Hour of Sharing; Pentecost; Peacemaking; Christmas Joy
  - d. Use newsletters, bulletin inserts, minutes for mission as often as possible to tell members of the mission that is being done with their dollars
  - e. Use the Mission Yearbook of Prayer and Study as an example of the scope of mission work done by all governing bodies of the Presbyterian Church (USA)

## ***New Ideas in Cultivating Generosity***

1. Give members permission to talk about their faith and money
  - a. Encourage every member to write a money autobiography that describes his or her thoughts and feelings about money from childhood to the present.
  - b. Create small groups to share the joys and concerns of working, getting a raise, not getting a raise, losing a job, managing a family, taking vacations, etc.
  - c. Provide resources and small group interaction around things like living more simply, what to do with extraordinary wealth, and the joys and struggles of including generosity in the family budget
  - d. Provide places where members can discuss their experiences with faith and money – the struggles and the joys. Where groups can covenant to encourage and support each other as they live out Christ's teachings on possessions, wealth and money.
2. Make practicing financial discipleship a priority for the whole faith community
  - a. Encourage and support members as they increase the percentage of their income they give to others
  - b. Thank everyone personally that gives anything to your church. Celebrate gifts!
  - c. Make all gift giving and the thanksgiving an integral part of worship
  - d. Encourage all members to share their financial discipleship stories and make new disciples along the way

## Where is Giving Going?

### ***A Ministry for People with Money***

1. Your church's most valued ministry—helping members make informed decisions on giving
2. Giving is a pastoral issue—encourage/empower just like other areas of ministry
3. People with money deserve special attention—*everyone* deserves special attention
4. People with money need help—resources mean choices
5. Where else will they learn?
6. Get over it—and help them!

### ***The Real World of Money***

1. Boston College researchers estimate that over the next half-century there will be the greatest transfer of wealth in history: \$41trillion-\$136 trillion!
2. Charities stand to receive between \$16 trillion and \$53 trillion in the next 50 years. Other studies have estimated that the larger the estate, the more is given to charity. For estates less than \$1 million, most goes to heirs and little would go to charity. For estates \$1-5 million, charity usually gets eight percent. Larger estates—including those over \$20 million—34% goes to charity. That's a lot of money! **Who will get this money? *Those who ask for it!***

### ***The Real World of Church***

1. Most churches today are struggling to fund their mission
2. Cost of doing ministry is rising faster than contributions
3. Mission giving shrinks when sessions must choose between salaries and mission
4. Many congregations have shifted to maintenance mode—vision is fading
5. Entire mission effort of the church suffers

### ***Members Want to Support the Church's Ministry***

1. Members are asking, ***“How can I be a better steward with what God has given me?”***
2. Unfortunately here's the usual order of events:
  - a. People want to support the church's mission
  - b. Church is uneasy talking about money
  - c. People give the money to someone else!
3. We can help them—just by sharing information!

### ***Three Financial Groups of People***

1. People who spend more than they make—average family has over \$9000 credit card debt
2. People who spend about what they make—breaking even, but not getting ahead
3. People who have more than they spend—looking for places to share/invest
4. The church can help each of these groups to address their financial concerns

### ***Changing Patterns of Giving***

1. Most faithful and generous supporters are “going home”: everybody moves, quits or dies!
2. Those replacing them are younger and financially overextended
3. Tend to be “investors” rather than “givers”
4. We must orient our younger members and teach them about giving
5. We must encourage our older members to help support the church of the future

## ***Most Given by a Few***

1. 10% of members give 50% of support
2. 10% give 30% (20% give 80%)
3. 30% give 10%
4. 50% give 10% (33% give nothing at all)
5. Different situations, resources and interests: Does it make sense to treat all people the same?

## ***Earned Income and Accumulated Assets***

1. Traditional stewardship and income—tithe, proportional giving, annual campaign, etc.
2. More people prefer to give from assets:
  - a. Aging
  - b. Expanding economy
  - c. More assets to share
3. Address this reality at every opportunity—annual campaign, sermons, classes, etc.
4. This is the area where most new income will arise
5. Personal contact is most effective means to encourage and receive

## **What Can We Do to Help our Members Give?**

### ***Begin with a Healthy Congregation—or the Best One You Have***

1. ***It's all about relationship!***
2. Best to have healthy church of healthy people—rarely all at same time
3. Take some time to introduce healthy atmosphere and giving habits prior to campaign
4. Session is vital in setting the tone and standard—begin with confession: *“We haven't done a very good job leading in the area of financial stewardship...neglected our responsibilities as leaders...we are going to try to do a better job...we have asked the pastor...and CE committee...some will work and others won't...please help us to do a better job helping our members be joyful stewards.”*

### ***Begin with Stewardship--“The earth is the Lord's....” --Psalm 24:1***

1. If we don't help our members, society will be happy to fill the vacuum with consumerism!
2. The only subject Jesus addresses more than money is the kingdom of God
3. Year-round stewardship education is a biblical mandate—37 stewardship sermons a year!
4. Don't say “need to give” during annual campaign—talk about “committing” and mission

### ***Mission Interpretation—we have to have something to support!***

1. Members give to a variety of charities—why should they give to the church?
2. Interpretation helps us understand how God's assets are being used in our midst.
  - Mission—what we're here to do
  - Values—why it's important
  - Stories—people's lives are being changed
3. People do not give to the church because it *has* needs...**People give because it *meets* needs!**

### ***Financial Development—fertilizer and fruit of Spirit—Romans 12:4-8***

1. Giving is a spiritual gift—key is generosity
2. Open and honest about money—integral part of life
3. Empower individuals
4. Emphasize values
5. Encourage involvement
6. Lead by personal example

## **Priorities and Options**

1. Be clear about priorities—*“The annual fund provides the foundation for our ongoing ministry. We want each of you to give your first and best gift to the Annual Fund.”*
2. Offer options as opportunities—*“We want to provide as many options to support the church’s ministry as possible. We want to share more choices than before, so we want to be clear that you are not expected to support all of them—just the ones you like.”*
3. Offer at least 60 special offerings per year—some outside the church
4. Tailor options for certain members—share projects/areas person consistent with priorities

## **Annual Campaigns Are the Best Way to Help!**

### **Think of the Annual Campaign as a “Campaign”**

1. Same process for a capital campaign can be put into the annual campaign
2. Confidential—not secret—information (only those who need to know will know information)
3. Carefully selected committee—connection, concern and capacity—keep small (2-4 people)
4. Farm out parts of campaign—mailings, dinners, gatherings, etc.—to include more people
5. Clearly articulate purpose—why support the church’s ministry—don’t assume people know!
6. Contact church leaders and key members for leadership gifts—called the “silent phase”
7. Help everyone be a part—called the “public phase”

### **Types of Campaigns—Strengths and Weaknesses**

(From A Stewardship Manual, PCUSA)

#### **1. Every-Member Visitation**

**Strengths:** materials are available; face-to-face discussions allow questions, answers, interaction; effective in allowing personal growth and acceptance; good starting point for stewardship education; updates membership roles; follow-up is usually included

**Limitations:** requires lots of time, leadership and training; challenging to recruit enough visitors; follow-up is difficult to complete; calls are interpreted as asking for money

#### **2. Small Group Meetings**

**Strengths:** allows for dialogue and discussion; organize members by areas, interests or availability; strengthens fellowship; creates high level of interest; allows personal input in program; provides setting for stewardship education

**Limitations:** time consuming; needs telephone callers to set up and remind members; requires host/hostess training; requires careful organization; doesn’t reach uncommitted; difficult for large congregation; negative voices can dominate; reaches only those who attend; requires extensive follow-up

#### **3. Sunday Worship**

**Strengths:** places stewardship commitment in context of worship; emphasizes spiritual dimension of commitment; requires less time or training; low cost; can be combined with other approaches; single, focused presentation; requires little calling

**Limitations:** may rise or fall on strength of sermon; offers no opportunity for dialogue; doesn’t reach shut-ins, nonresidents, or uncommitted; reaches only those attending; requires much follow-up; offers minimal opportunity for involvement

#### **4. Direct Mail**

**Strengths:** allows for creativity in writing; requires little time; includes all members; easy to manage; efficient use of effort; consistency in message; requires little leadership; non-confrontational; updates membership rolls

**Limitations:** lacks face-to-face dialogue; materials must be top quality; ineffective if discontent present in congregation; resembles secular appeals; requires efficient way to receive commitments; follow-up is difficult

#### **5. Congregational Dinner**

**Strengths:** can have several dinners to reach more members; requires less time; everyone hears same presentation; good use of audiovisuals; often low cost; strengthens fellowship; face-to-face contact; can distribute materials easily

**Limitations:** doesn't reach shut-ins, nonresidents or uncommitted; large crowd can inhibit sharing; reaches only those in attendance; requires extensive follow-up

#### **6. Telephone Approach**

**Strengths:** requires less time; low cost; allows for questions, answers and interaction; easier to enlist callers than visitors

**Limitations:** lacks face-to-face dialogue; materials being mailed must be top quality; often ineffective if discontent in congregation; resembles secular appeals; requires efficient way to receive commitments; follow-up is difficult

#### **7. Consecration Day**

**Strengths:** requires little time or training; distribute materials easily; low cost; can be combined with other approaches; single-effective presentation; can use guest speaker; little calling; involves celebration

**Limitations:** rise or fall on strength of speaker; no opportunity for dialogue; minimal involvement; doesn't reach shut-ins, nonresidents or uncommitted; reaches only those in attendance; may require extensive follow-up; effective guest speakers are difficult to find

#### **8. Personal Delivery**

**Strengths:** cuts down on travel time; little training; highlights confidentiality; involves large number of people; requires little time; fun—can stimulate creative, playful spirit; reaches uncommitted members

**Limitations:** can encounter delays/breakdowns in delivery system; process can be more important than objective; difficult for shut-ins to participate; needs trained “trail bosses” or leaders; encourages little dialogue about work of church; includes no training for “riders”; little opportunity for stewardship education

### ***Do a Good Job***

1. It rarely matters what we do—as long as we do it well!
2. Personality of the campaign should be similar to personality of pastor and congregation
3. “Stretch a little” by making a little more crazy or a little more refined—shows importance
4. Be honest about money and what it will do—“This is what we are doing...and this is what we would like to do in the future...these are not my/our priorities...these are the values this congregation has identified...these are our values...these are our ministries....”

### ***Have a Plan...and Follow It!***

1. This is important—demands time, attention and resources—covenant together seriously!
2. Begin early—January is best, but summer will do
3. Set deadlines—meet regularly and hold people to them—shows value and importance
4. Presentation is vital—use your best people in public

### ***Treat Different People Differently—It's All About Relationship!***

1. Talk to your most generous givers before the public campaign—these people can help you!
2. Enlist them on your committee—or at least as advisors
3. Ask them to make advance/leadership/encouragement pledges
4. Ask leaders—staff, session, deacons, leading supporters—to pledge before public campaign

## **Send different letters to different people—Give Specific Requests**

1. Members who give nothing—ask to consider pledging \$10 per week
2. Members who give but don't pledge—ask to pledge half of usual gifts—but give all of it!
3. Members who pledge and give regularly—thank them/ask percent increase of gift or income
4. Most generous members—thank them and personally deliver top ten percent (best delivered by the pastor)

## **Visit Some Members Every Year**

1. Average letter is held less than **four seconds**—including the ones they read!
2. Personal contact is most effective way to share information—shows respect for person and importance of mission
3. Share with members who can make the biggest difference—who has most potential?
4. Don't coerce or pressure—thank them for past support and share future ministry
5. Let your personality, their personality and your relationship determine your conversation

## **Visit Everyone—Every Now and Again**

1. Called an “Every Member Canvass”
2. Can be done anytime of year—Session Check In and Check Up
3. If done as part of annual campaign, take time to talk about church
4. Volunteers are the key—and greatest risk!

## **Talk about the Mission of the Church**

1. Help members understand importance of giving beyond self
2. Session models for members—personal giving (all pledge/give) and budget gifts to mission
3. Pictures of what mission does as well as ministry
4. Be proud to be a Presbyterian—we often take for granted the special attributes of our church
5. Contact Presbytery/Synod/General Assembly for materials on “mission beyond our doors”

## **Address the Stereotypes**

1. *“They don't need my money—they have \$1million in the bank”*
  - a. Talk about ministry income—those who are willing to understand will get it
  - b. Talk about operating reserve—3-6 months operating expense to protect church
  - c. Talk about endowments—opportunity to help them see the value of endowments (“they keep giving each year...”)
2. *“He's just saying that because he wants a raise.”*
  - a. “I want a raise—or at least to break even with a COL increase. Doesn't everyone?”
  - b. “We have a wonderful staff who serves us generously throughout the year. God has given us the responsibility to take care of them as they take care of us.”
3. *“They're just trying to manipulate me by ‘guilting’ me into giving.”*
  - a. “Guilt is not always a bad thing—especially if what you're doing is wrong!”
  - b. “Stewardship is a vital part of discipleship. We talk about it all year long in terms of time, talents and treasure. At this time of year, we talk about treasure—because that's what we're doing now. We're talking about funding the ongoing ministry of this congregation and the Presbyterian Church around the world.”

## **Components of a Good Narrative Budget**

### ***Budgets can be Confusing***

1. Some don't understand the numbers—most don't understand why they should care
2. Few understand why the church needs money when they have some in the bank
3. Many just want to be sold—explained, interpreted, challenged

### ***Narrative Budgets Connect the Dots***

1. Put faces on the numbers—help members see where the money comes from and goes to
2. Use present budget—not next year's dream budget—leaders can thank and church celebrate
3. Talk about income and investment—many don't know how to give most effectively for them
4. No “Administration,” “Personnel,” “Facilities”—these are included in the ministry areas
5. Order items as people experience them—worship is usually over half of ministry investment

## **Try to Be “Normal” When Talking About Money**

### ***The More “Normal” You Are, the More You Can Help***

1. Most people are conditioned to feel uncomfortable talking about money in church
2. You can help them by being “normal”—be yourself
3. Just be honest about what you're planning to do and how much it's going to cost
4. Your members will appreciate it and respond with their own “normal”
5. They will call you later with more offers to help

### ***Don't be afraid to Ask***

1. Most members don't have a system for determining their pledge
2. “What other people think is an appropriate amount for me to give.” How squishy is this!
3. Give specific examples
  - a. Tithes—income or assets—“this is the biblical standard and a good place to begin”
  - b. Proportional Giving—based on percentages
  - c. Planned Growth in Giving—increase 1% of income each year
  - d. Special Gifts—in addition to pledge—to support particular ministry or mission
  - e. Endowments—endow pledge; endow ministry/mission area; endow “wherever it's needed most”
4. Most people respond better if asked in person

### ***Say Thank You***

1. Easiest piece of process to forget—and the most important!
2. Say thank you in at least four different ways:
  - a. Say Thank You within twenty-four hours—email, telephone, personal contact
  - b. Hand-written Note—mailed next day
  - c. Formal Letter from committee or session—hand-signed by each member!
  - d. Phone calls—“Thank-a-thon” with youth
  - e. Newsletter or Website
  - f. Personal Visits—to deepen relationship, admit how you felt while meeting with them
3. What do we do after we have their money? Do we ever want another gift?
4. ***It's all about relationship!***

***Thank you for serving our church...we're all in this together!***