



PROJECT+RESOURCE

Day 2 | September 23, 2015
Denver, CO

Day 2

Wednesday, September 23, 2015



7:30	Breakfast
8:00	Bishops' Suites Reports
8:30	Annual Pledge Campaign: Leadership & Campaign Preparation
10:00	Break
10:20	Annual Pledge Campaign: Advance Campaign
12:00	Lunch
1:00	Annual Pledge Campaign: Communications & Case Development, Ministry Minutes & Phone-A-Thon
2:30	Break
3:00	Planned Giving
5:00	Break
5:30	Dinner
7:00	Bishops' Suites Discussions

Bishops' Suites Reports:

Day 2

Resource 2.1

Report:

1. Establishing metrics; how will we establish base-lines and analysis?
2. Accountability and transparency: how will we make this a priority in our diocese?
3. How will we set measurable goals for system's change and increased resource development?
4. Who can lead this conversation in our diocese? (one point-person, faculty, beyond faculty)
5. How will we structure a program to roll-out adult teaching in our diocese over the next 5 years in financial development and membership growth?
 - a. What is the teaching system?
 - b. Do we begin with three experimental churches for teaching?
 - c. Teaching in pairs?
 - d. How will we cycle all churches through it?
 - e. How will this fit with existing formation (Fresh Start, CDI, etc.?)
6. Where might we experience barriers?
7. What money can we use to raise more money?
8. How will we set measurable goals for systems change and increased resource development?

Annual Pledge Campaign: Leadership & Campaign Preparation



Training an army of consultants in faith—based philanthropy

You are gathering clergy, lay leaders, and Bishops to consider the ministry of teaching leaders in your diocese to host generosity with real, proven tools. Jesus helped people to give and then modeled the ultimate self-offering. We must learn the tools which help our churches to do that work over and over again, year after year. We are told in the gospels that the women who followed Jesus provided out of their resources for His ministry. Jesus repeatedly hosted conversations that resulted in the same self-offering He himself would model as an expression of God's ultimate act of generosity. Jesus was very strategic and used real tools — rivers, wells, tombs, bread, wine, a cross, oil, and meals to do this work. Today we will learn to use tools as well — tools which get a job done and which host a valuable conversation about faith and philanthropy.

We have members of our congregations who, if helped along with real tools such as pledge cards, special events, crafted conversation, spread sheets, and case brochures — to name a few — could give much more generously through their pledges. They need help to leverage and increase their robust pledges, their major gifts, and their planned gifts at end of life. We have a responsibility to help them into that generosity by using effective financial development tools in that ministry in just the same way we use an effective cup to bring wine to lips and an effective plate to bring bread to hands.

And of course, there are the funds raised. The church needs those funds for mission. There is much to do — hungry people to feed, lost people to find, imprisoned people to visit, and people to comfort. The money we raise makes those things happen in the life of our churches.

We have so many financial resources and so much work to which to apply them. We simply have to raise money so that we can spend it on the work Jesus calls us to do every day.

We long for a church in which the lack of money is never a barrier to our work for the Kingdom of God. But we live in a church in which our leaders are not trained in financial development. So Project Resource is a way to place more than 500 free financial development consultants in our dioceses to help, encourage, support, evaluate, and provide resources so that lay leaders need not re-invent the wheel every time they begin new



Notes:

Annual Pledge Campaign: Leadership & Campaign Preparation

Notes:

Training an army of consultants in faith—based philanthropy (cont.)

ministries in financial development and so that clergy and lay leaders can easily access hundreds of notes and templates online.

Two icons

Awakening from Sleep & Welcoming the Frightened

Opening Meditation

Two icons: The Resurrection and the Beloved Disciple

What does it mean to pull people from the sleep of unawareness, to an awareness of gratitude and generosity? Why do we need to help them?

What does it mean to accompany people afraid of, and unprepared for, the work of raising money and people? Why does intimacy with Christ support this work?



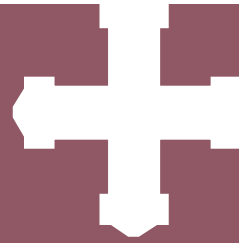
FEARLESS TIP: For other material on formation in church life, see *Fearless Church Fundraising*, Pages 43-63.

Notes:



Icon: Resurrection Icon (The Anastasis)

Resource 2.2



Egg tempera on wood, 2001, Mount Athos, Greece

The Resurrection Icon also known as the Harrowing of Hell is from the seventh century Chora Monastery side-chapel in Istanbul, where the monks did their meditation. The image remains there today. On the left: Jesus grabs Adam, watched by John the Baptist, King Solomon, King David, and Elijah. On the right: Jesus grabs Eve, watched by Abel — the first innocent, Moses, Peter, John the Evangelist, and James. Not one person is complacent except Satan at Jesus' feet. Their features are taught with participation in the work Jesus is doing. Only Satan is immobilized — his head abnormally small, bound, laying in darkness among the discarded implements of the crucifixion — nails, manacles, and keys — all still tumbling from the explosion of saving grace. In the middle stands Jesus. His waist bound tightly with a swath of cloth twelve inches deep, from loin to breast — its shadowed edges indicating its tightness, and hiking up his blazing white vestments so that his feet are free to find a firm hold as he pulls Adam and Eve from passive sleep. Adam and Eve have been sleeping; they have no belts, their vestments tumble down around their feet and sag all over their body in the posture of the waiting, the sleeping, the saved. Jesus has female birth-giving hips as he twists the birth of life into eternity.

Book of Common Prayer Collect

O God of unchangeable power and eternal light: Look favorably on your whole Church, that wonderful and sacred mystery; by the effectual working of your providence, carry out in tranquility the plan of salvation; Let the whole world see and know that things which were cast down are being raised up, and things which had grown old are being made new, and that all things are being brought to their perfection by him through whom all things were made, your Son Jesus Christ our Lord. *Amen.*

Stewardship Prayer

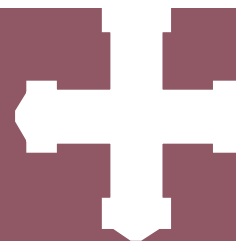
Lord Jesus Christ, with the great dynamos of your power, you have pulled life from death, freedom from imprisonment, wakefulness from sleep, in-action to action. Help us do the hard work of leadership in stewardship and financial development. Help us to pull a sleepy people weighed down by sleepy distraction and heavy greed into a generous wakefulness of gratitude and mission — investment by helping them give their money away. Help us to set free a church too often confined in the coffins of scarcity so that all Saints may work to unfurl the Kingdom of God. *Amen*



Icon: The Beloved Disciple

Listening to the Heartbeat of God

Resource 2.3



Egg tempera on carved wood, 2002, Mount Athos, Greece

This Icon is a representation of The Beloved Disciple who, by church tradition, is shown listening to God's Heartbeat (John 21:20) and is mentioned six times in John's gospel. The image is an ancient one and is the foundational icon of the Celtic tradition as well as one of the church's two main icons of Saint John. The image is designed to reflect the friendship into which Jesus invites the Beloved Disciple in John's gospel (John 15:15) and serves as a reminder that our gifts to each other, to God through the church, and to the city and world through the church, are an act of friendship which emerges from our relationship with God through Jesus Christ. Our giving is an expression of our understanding that we are made in the image of God, who models the generosity we express through our love, our giving, and our creativity. We too are lovers, giver and creators. The work of stewardship and financial development is to help people live into their imago dei — their image of God. Since the end of the first century, the Beloved Disciple was considered to be Saint John the Evangelist, however some scholarship disputes that assertion. Regardless, the image of welcome and comfort is a powerful one for the stewardship leader.

John 20

Early on the first day of the week, while it was still dark, Mary Magdalene came to the tomb and saw that the stone had been removed from the tomb. ²So she ran and went to Simon Peter and the other disciple, the one whom Jesus loved, and said to them, 'They have taken the Lord out of the tomb, and we do not know where they have laid him.' ³Then Peter and the other disciple set out and went towards the tomb. The two were running together, but the other disciple outran Peter and reached the tomb first.

John 13:23

One of his disciples — the one whom Jesus loved— was reclining next to him...

Prayer

Lord Jesus Christ, you welcome all of humanity to intimacy with you. You have called us friends and you have done so out of the experience you have had on Earth with your friends. You welcome your beloved friend to lay next to you in the last hours of your friendship, during the Last Supper with your friends. Bring us, Lord Christ, to lie against you for comfort and encouragement as we do the hard work of stewardship, financial development, and evangelism in our church. When we face resistance, draw close to us. When we are tired, welcome us to rest. So encourage us by the intimacy of your friendship that we may do the hard work of encouraging the people of our church to give their money to its mission with the power of a leader and midwife. *Amen.*

Annual Pledge Campaign: Leadership & Campaign Preparation



Notes:

Day 2 Overview

This day is a study of the process and resources needed for planning and executing effective pledge campaigns in churches of all sizes and in all places. It will always be tempting for churches and dioceses to claim pathological uniqueness (“Oh, but our church is so different! That won’t work with our very special people!”) when tempted into the resistance which we so often face in the grip of fear about raising money. This day will provide strategies and resources that reduce fear and empower courage. Applying the basics of a pledge campaign strategy will work in a church of 30 or a church of 3,000 members. Some of the logistics will change but the process works no matter how large, no matter how sophisticated, and no matter how resistant or enthusiastic.

The pledge campaign process includes:

1. The final “thank you!” ending the last campaign.
2. Careful inclusion of congregations in planning and imagining mission while maintaining the social and spiritual health of the church.
3. Doing work worthy of a philanthropic investment and being able to describe it effectively.
4. Doing and reviewing metrics.
5. Telling the congregation the next campaign is coming and providing spiritual teaching about philanthropy in churches and in faith.
6. Clearly beginning the campaign with an event, an “ask,” and materials with a deadline for pledges.
7. Managing the eight weeks of communications of case and need.
8. Encouraging the pledge submissions.
9. Thanking members as they pledge — immediately and over time.
10. Asking boldly and directly for any remaining pledges towards the end of the 8 weeks and fighting for 100% inclusion.

11. Communicating urgency without anxiety.
12. Celebrating the campaign end with fun and enthusiasm for a mission funded.
13. Thanking at the end of the campaign, immediately reviewing metrics, and beginning the next campaign plan.
14. Stewarding the gifts appropriately with effective mission, gift management, and gift acknowledgement.

We begin with case development as an introductory and primary base-conversation to set up leadership in pledge campaign design and management. This content will continue into tomorrow's curricula, followed by major gifts and other work. The church must face the reality that modern technology and generational change is requiring that churches not only deserve the money they seek to raise, but also are able to effectively communicate their case to a distracted, over-stimulated, and message-overwhelmed congregation.

Modern church philanthropy is facing one primary challenge: we must now convince an informed donor community that the church is a good investment, and that we deserve the money we seek for mission.

It used to be the case that people pledged and gave to our churches simply because they always had, and because their parents did before them. Those days are over. Today, people who are making decisions about their giving and their membership have access to the stories other effective non-profit agencies tell very effectively about why their mission is essential. The YMCA, the local museum, public radio — they all do a great job and we can no longer rest on church membership as the sole means by which people know how and why to make a pledge. If our churches cannot communicate that mission is essential, then donors will not make the investment of pledge or membership, gifts let alone major and planned gifts.

We now must raise money and we must raise people. New pledges and new members no longer walk into our doors. We must find them and keep them. Pledges and membership are now linked as we raise both money and people year-round.

Notes:

Annual Pledge Campaign: Leadership & Campaign Preparation

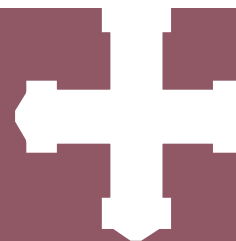
Notes:

Day 2 Overview (con't.)

1. Case-for-support: deserving the money we seek to raise.
 - a. How do we communicate that we deserve the money we seek to raise?
 - b. Involvement of the congregation — case content development.
 - c. Collect and write your message content — teaching case writing.
 - d. Define who your mission serves for your congregation: Explain the “WHY?” not just the “what” and the “how.”
 - e. Personal stories of who benefits from your ministry — HUMAN LIVES
 - i. Tell human internal stories
 - ii. Tell human external stories
2. Defining question: What impact on the area around your church would be missing were your church/diocese to disappear in your town/region?

Year-Round Cultivation

Resource 2.4



Year-Round Cultivation or Involvement and Investment

Why it matters and how to manage it.

Parishioner Name	Arrival Date	Involved in currently	Next deeper involvement step	Next step for deeper involvement/facilitator
Smith, John	January 2012	Gardening	Chair — hospitality	Sam Jones will ask December 2015 for spring
Jones, Amy	1948	Vestry	Planned giving	Charles Johnson will ask for estate plan inclusion
Wingate, Harry	2014	Attendance Sundays	Acolyte	Steve Watson will ask after November
Guerin, Mary	1989	Attends monthly	Invite to Lunch	Rector will reach out 9/13
Harrington, Tyler	2015	Attends weekly	Invite to newcomer class	Sarah Jones will invite by 8/18

Annual Pledge Campaign: Leadership & Campaign Preparation

Notes:

Measurable Donor Involvement Cultivation — A Weekly Exercise

Essential to donor management is the strategic cultivation process in which a church finds ways to engage each member and visitor to determine what their membership-involvement is currently, and how best to draw them deeper into the life of the church. This deeper, physical involvement is the best way to cultivate giving and raise energy. People give to what they are physically involved in and are regularly attending. The worksheet above shows a sample of a very simple involvement tracking system used in a church of 40 people. It is simple, and can be done manually or, in a larger church, it can be managed by software. Either way, the important thing is that our churches find ways to regularly ask questions about each member:

1. Who are they? Do leaders (clergy, staff, vestry) know them? If not, how can we get to know them? Who needs to call them and make a visit? How shall notes be recorded after the visit is made?
2. What are they involved in? What events do they attend?
3. What is the logical next step for deeper involvement?
4. Who will accomplish that step and by what date? Who is the best person to ask in the best way, at the best time, for the best result?

This work will slowly and methodically track effective, measurable change in the lives of the congregation members. Their deeper involvement will make the pledge and the major gifts/planned gifts “ask” more fruitful as well. Each invitation to deeper involvement is a moves-management task towards increased philanthropy even if it takes years for a member of the congregation to appear on a major gifts list because they have capacity and interest.

It is essential that churches actively talk about, and pray publically about, the money they hope to raise, the mission they hope to achieve, and the people they hope to attract as new members. The church tends to be shy



Notes:

about these public discussions and these public prayers. It is essential that throughout the year, strategic insertions into liturgy, meetings, and publications focus clearly on the desire to raise money and people.



FEARLESS TIP: For other material on case discernment, see *Fearless Church Fundraising*, Pages 76-83

Annual Pledge Campaign: Leadership & Campaign Preparation

Notes:

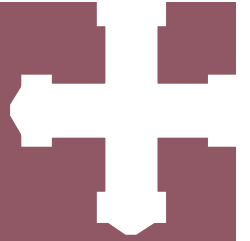
Case-for-Support Brochure: How to Develop one

Can a diocese (even the TEC) make a set of annual model documents for churches to use so that each church does not need to reinvent the wheel each year?

1. Word Document with graphic cover that they can print, in-house or not.
2. Cover: Show 5-8 photos of life going on in your parish, photos that help represent your theme. Include that of the parish logo theme of the campaign.
3. Content: Tell your story through the theme lens.
 - a. Perhaps through 3rd person narrative.
 - b. Perhaps through the voice of a child who is thanking the parish for his future spiritual home.
 - c. Perhaps as a collection of first person narratives from parishioners.
4. Include a return envelope with postage to return the pledge
5. Pledge Cards and Online Pledging
6. Website: Your website is an investment. Build in capabilities to allow interaction.
7. Other messaging for the campaign:
 - d. eNewsletters
 - e. Website
 - f. Bulletin Inserts
 - g. Sermons
 - h. Verbal Announcements
8. Mailing lists: Are they the real target? (better list equals better communication, your best friend is your list)

The Wow Card

Resource 2.5



The “Wow card” is a way to illicit investment and involvement. The cards welcome ideas from the congregation about the things the church can consider doing which forms the foundation of mission and ministry.

In one church, a quiet, unassuming lady wrote “Why don’t we buy a van to pick up our older, founding members on Sundays? We could use the van between Sundays to deliver groceries to the poor and meals to the sick or grieving.”

When the message on the “wow card” was read aloud, another member wrote a check to cover the cost of the van. Three other “older, founding members” which later enjoyed the new van’s services, left bequests totaling \$560,000 out of the gratitude they felt for their church taking the time and making the effort to pick them up when previously they were home-bound on Sunday mornings due to old age. The van was then painted with the church logo and raised the city’s awareness to their presence and ministry.

All this came from one lady writing a few phrases on a card and placing it in the offering plate. And of course her pledge went up when she saw her idea become a reality because she felt she had agency in her church.



Let’s do something Big, something WOW... If Jesus came to Christ Church, what would make him say, “WOW!”?

Examples: “do some local outreach” - too generic
 “giant yard sale with all four churches on the common;
 all proceeds go to Metro Food Bank” - just right

Focus Group Questions

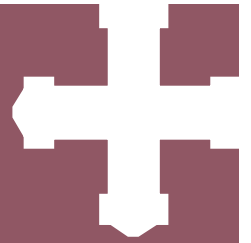
Resource 2.6

Hosting meaningful conversations is a way to involve donors before asking them to invest through philanthropy. The church must learn to ask for the opinions of its members before it asks for their money. Focus group conversations like the one below are a way to do that cultivation work.

Focus Group: a program of involvement and investment curating among parishioners

Sample questions for a focus group to review the last campaign and prepare for the next campaign.

1. What is Christ Church doing in the lives of people which inspires your giving of money to fund the mission of Christ Church in 2014?
2. Write down 3 to 4 things that happen in the lives of congregants as a result of the church's ministry, so far as you know.
 - a. "A person will receive a visit in the hospital with communion"
 - b. "A person will be inspired by the beauty of the liturgy and music from which to draw strength during a difficult time."
3. Write down 3 to 4 things that happen in the lives of non-members of our church through the mission and resources of Christ Church.
 - c. "A homeless woman will receive good food, kindness, and a bed on Monday nights at the church."
 - d. "An abused person can come to Christ Church and speak to a priest who will connect him/her to a shelter for abused spouses."



4. Write down one word or phrase which conveys the mission of our church or an aspect of it.
5. Write down what you might use as a slogan for a stewardship campaign which conveys both the internal conversion of giving and the external need for financial resources. Ex: The Community of Jerusalem, a community of monks, has the slogan, "The heart of the city, the heart of God"
6. If a friend asked you why you pledge to Christ Church, what would you say?
7. If you were to use a photo on the website of the stewardship campaign to convey the power of what your church accomplishes in human lives, what image would you use?
8. When have you met Christ in the form of a member of the clergy, staff, or congregation? What was that encounter like?
9. Why do you give money to Christ Church?
10. What would you say to a congregant who was trying to decide if they could increase their pledge, but were aware that the decision would mean decreasing a gift to another charity?
11. What do we do at Christ Church which would thrill Jesus based on what we know of Him?
12. What does the Stewardship Committee need to know that it might not know?

The Desires Exercise

Resource 2.7

Ignatian Discernment

A tool to uncover the longings of the heart and perhaps even of the Holy Spirit.

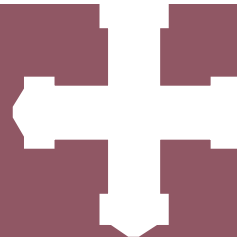
Write down, in a stream of consciousness, ten things you desire; They may not even be possible. This list will remain entirely confidential. Just write down ten things you desire, even if they are physically, medically, logistically, or financially impossible. DO NOT EDIT the list to make it reasonable. Just write fast in stream-of-consciousness. Seeing what you desire is a valuable and creative tool in personal and corporate discernment.

- 1)
- 2)
- 3)
- 4)
- 5)
- 6)
- 7)
- 8)
- 9)
- 10)

This is a personal, Ignatian discernment exercise to expose longings which tell us important things about calling, freedom, and creativity. The same work can benefit a church as it considers its case-calling. What do you want as a congregation? Might God provide the resources through donors? How can that happen if you do not know what you want? Art of Hosting tools may be effective for this work as will parish discernment retreats.

Case Development Exercise

Resource 2.8



A Training Tool for Churches or a Diocese

You are the Rector or Stewardship Officer of a parish.

The parish may be of your choosing — one in which you are currently involved or one you imagine.

You have been asked to write the first draft of a case-for-support for an Annual Stewardship Campaign. This is a rough draft and one to which the newly assembled Stewardship Committee will react as the first step of developing their own plan by massaging and editing your first draft. Your draft is a place from which to start.

Use the following outline or one of your own choosing:

1. Introduction (1 paragraph)
2. Short history (1 paragraph)
3. Present needs (2 paragraphs)
4. Connect objectives with organization (ie: show a link between the objectives of the parish and the work being done which will be funded by this campaign.) (2 paragraphs)
5. Summary of future goals show where the parish is going based on the track record (1 paragraph)
6. Leadership: show why this team is the perfect group of leaders to make these objectives a success. (1 paragraph — site only one person)
7. Gifts and benefits: (only in a capital case) (1 paragraph)
8. Financial information: discuss the past few years of fiscal management and convince the reader of the financial well-being of the parish. (1–2 paragraphs)
9. Conclusion: make a strong restatement of your basic appeal (1 paragraph)

What you are writing is the kind of information which would be in the draft of a brochure prior to the annual campaign. Parishioners would get this in summer, in advance of a September Campaign. This is a motivational document designed to have the person say to themselves “They have clearly and powerfully communicated “WHY” I should give. They deserve this money!!! This parish is worthy of my philanthropic dollar regardless of my calling to or awareness of my Christian duty to give a portion of my money to God through the church!”

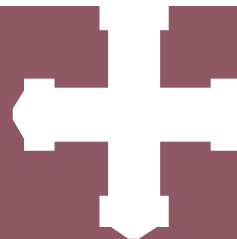
Case Development Exercise

Resource 2.8 (Cont.)

When writing, remember why people give:

1. Social acceptance.
2. Advancing a cause they believe in.
3. Call from God (spiritual depth and awareness).
4. Moral obligation.
5. Benefits to the donor.
6. Benefits to the community and world.

Parish or Diocesan Case Development Resource 2.9



A simple exercise you can do with a group (vestry, committee, etc.)

What do we do that Jesus would recognize and love?:

What do we provide?:

How do we change lives?:

What results to society do we provide which make change?:

How has one life been changed by our mission?:

Why should a donor invest in this work?:



FEARLESS TIP: For other material on pledge campaign case development, see *Fearless Church Fundraising*, Pages 107-120

Art of Hosting Meaningful Conversation

Resource 2.10

Case Development & Investment: How to Harvest Longings

In her new book, *Daring Greatly*, Brene Brown argues that a group of leaders who solicit, accept, and incorporate feedback inevitably nurture an engaged, tenacious group of people who are both innovative and creative.

Allowing our congregation to come together to express their hopes and dreams for the church mission and life inspires us to be vulnerable, to share openly, and to persevere together during times of hardship; whereas not gathering to express our longings openly together keeps us small, resentful, and afraid. Authoritarian cultures inspire disengagement, blame, gossip, stagnation, withheld financial and volunteer investment, favoritism, a dearth of creativity, and a stifling of innovation.

Quoting writer and leader Peter Block, Chris Corrigan writes, “Far from being about control, leaders exercising the convening capacity set boundaries for action and then invite within them.

Peter Block says: “We hold leadership to three tasks:


1. Create a context that nurtures an alternative future, one based on gifts, generosity, accountability, and commitment.
2. Initiate and convene conversations that shift people’s experience, which occurs through the way people are brought together and the nature of the questions used to engage them.
3. Listen and pay attention.

Convening leaders create and manage the social space within which citizens get deeply engaged. Through this engagement, citizens discover that it is in their power to resolve something or at least move the action forward.”

The Art of Hosting meaningful conversation can be a subversive act against power and control. It will not be received well in churches led by leaders bent on control. It will only work and thrive in places in which the views and opinions of the congregation are welcome and encouraged. Regardless it is the only way forward to achieve inclusion which leverages giving to a full potential.

Why is this material inserted into teaching on raising money and people?

One of the primary issues we are noticing in philanthropy at the beginning of the 21st Century is that a donor will only invest his/her money and membership into an agency which has invited his/her opinion. Nonprofit agencies which lead with order or control will not invite opinions or mission-longings from their constituents. The only way to effectively raise money or people in the 21st Century is to allow them to physically and relationally engage in mission-formation by hosting a safe place and structure in which their longings may manifest and be heard as equals; even equals with Bishops and clergy.



The Art of Hosting is a secular, effective series of tools used to engage congregations in the harvesting of their longings so that they feel heard and can see some of their collective, harvested longings for mission evident in the case into which they are being invited to make financial pledges and membership choices.

What is The Art of Hosting?

- a. Limiting Beliefs.
- b. Conversation tools.
- c. Chaordic (the overlap space between chaos and order) Space: The value of losing control and order for creativity.

Hosting in a Hurry

Resource 2.11

Putting the Art of Hosting into Practice:

A quick reference for convening conversations that matter.

All conversations are opportunities for us to connect a little deeper with one another. In the Art of Hosting practice we often talk of the four fold way and the seven little helpers: the simplest tools for convening any conversation.

By far most of the conversations we host in our lives at work or in the community are conversations with small groups. These simple processes are offered as quick reference for bringing depth and life to those conversations.

The Four Fold Way of Hosting

We have learned that quality conversations leading to close team work and wise action arise when there are four conditions present.

1. Be Present
2. Participate and practice conversations
3. Host
4. Co-create

We call these four conditions the Four Fold Way of Hosting, because you can practice these any time. They form the basis for all good hosting.

Be Present

...host yourself first - be willing to sit in the chaos - keep the space open - sit in the fire of the present...

Being present means showing up, undistracted, prepared, clear about the need and what your personal contribution can be. It allows you to check in with yourself and develop the personal practice of curiosity about the outcomes of any gathering. Presence means making space to devote a dedicated time to working with others. If you are distracted, called out or otherwise located in many different places, you cannot be present in one. For meetings to have deep results, every person in the room should be fully present. Collectively, it is good practice to become present together as a meeting begins. This might be as simple as taking a moment of silence to rest into the present. If an Elder is present, a prayer does this very nicely. Invite a collective slowing down so that all participants in a meeting can be present together.

Questions to help you become present

What am I curious about?

Where am I feeling anxiety coming into this meeting and how can I let that go?

What clarity do I need?

What clarity do I have?

Participate and practice conversation

...be willing to listen fully, respectfully, without judgement and thinking you already know all the answer – practice conversation mindfully...

Conversation is an art, it is not just talk. It demands that we listen carefully to one another and that we offer what we can in the service of the whole. Curiosity and judgement cannot live together in the same space. If we are judging what we are hearing, we cannot be curious about the outcome, and if we have called a meeting because we are uncertain of the way forward, being open is a key skill and capacity. Only by practicing skillful conversation can we find our best practice together. If we practice conversation mindfully we might slow down meetings so that wisdom and clarity can work quickly. When we talk mindlessly, we don't allow space for the clarity to arise. The art of conversation is the art of slowing down to speed up.

Host conversations

...be courageous, inviting and willing to initiate conversations that matter - find and host powerful questions with the stakeholders – and then make sure you harvest the answers, the patterns, insights learnings and wise actions...

Hosting conversations is both more and less than facilitating. It means taking responsibility for creating and holding the container in which a group of people can do their best work together. You can create this container using the seven helpers as starting points, and although you can also do this in the moment, the more preparation you have the better. The bare minimum to do is to discern the need, prepare a question and know what you will do with the harvest. If there is no need to meet, don't meet. If there is a need get clear on the need and prepare a process that will meet that need by asking a powerful question. And always know how you will harvest and what will be done with that harvest, to ensure that results are sustainable and the effort was worth it. Hosting conversations takes courage and it takes a bit of certainty and faith in your people. We sometimes give short shrift to conversational spaces because of the fear we experience in stepping up to host. It is, however, a gift to host a group and it is a gift to be hosted well. Work in meetings becomes that much better.

Practicing conversation

- Listen and help others to listen
- Use silence
- Contribute to the harvest
- Put good questions in the center
- Connect ideas

Hosting basics

- Determine the need and the purpose
- Create a powerful question
- Host an appropriate process
- Encourage contributions
- Harvest

Hosting in a Hurry

Resource 2.11 (cont.)

Co-create

...be willing to co create and co-host with others, blending your knowing, experience and practices with theirs, working partnership...

The fourth practice is about showing up in a conversation without being a spectator, and contributing to the collective effort to sustain results. The best conversations arise when we listen for what is in the middle, what is arising out of the center of our collaboration. It is not about the balancing of individual agendas, it is about finding out what is new. And when that is discovered work unfolds beautifully when everyone is clear about what they can contribute to the work. This is how results become sustainable over time – they fall into the network of relationships that arise from a good conversation, from friends working together. So contribute what you know to the mix so that patterns may become clear and the collaborative field can produce unexpected and surprising results.

Co-creation

Speak truth

Speak for what is in the middle

Offer what you can

Ask for what you need

Commit to what you can

The Seven Helpers

Over the years, we have identified seven little tools that are the source of good conversational design. At the bare minimum, if you use these tools, conversations will grow deeper and work will occur at a more meaningful level. These seven helpers bring form to fear and uncertainty and help us stay in the chaos of not knowing the answers. They help us to move through uncomfortable places together, like conflict, uncertainty, fear and the groan zone and to arrive at wise action.

1. Be present
2. Have a good question
3. Use a talking piece
4. Harvest
5. Make a wise decision
6. Act
7. Stay together

1. Be Present

Inviting presence is a core practice of hosting, but it is also a key practice for laying the ground work for a good meeting. There are many ways of bringing a group to presence, including:

- Start with a prayer
- Start with a moment of silence
- Check in with a personal question related to the theme of the meeting

- Pass a talking piece and provide space for each voice to be heard
- Start well. Start slowly. Check everyone in.

2. Have a good question

A good question is aligned with the need and purpose of the meeting and invites us to go to another level. Good questions are put into the center of a circle and the group speaks through them. Having a powerful question at the center keeps the focus on the work and helps a groups stay away from unhelpful behaviors like personal attacks, politics and closed minds.

A good question has the following characteristics:

- Is simple and clear
- Is thought provoking
- Generates energy
- Focuses inquiry
- Challenges assumptions
- Opens new possibilities
- Evokes more questions

It is wise to design these questions beforehand and make them essential pieces of the invitation for others to join you. As you dive into these questions, harvest the new questions that are arising. They represent the path you need to take.

3. Use a talking piece

In it's simplest form a talking piece is simply and object that passes from hand to hand. When one is holding the piece, one is invited to speak and everyone is invited to listen. Using a talking piece has the powerful effect of ensuring that every voice is heard and it sharpens both speech and listening. It slows down a conversation so that when things are moving too fast, or people begin speaking over one another and the listening stops, a talking piece restores calm and smoothness. Conducting the opening round of a conversation with a talking piece sets the tone for the meeting and helps people to remember the power of this simple tool. Of course a talking piece is really a minimal form of structure. Every meeting should have some form of structure that helps to work with the chaos and order that is needed to co-discover new ideas. There are many forms and processes to choose from but it is important to align them with the nature of living systems if innovation and wisdom is to arise from chaos and uncertainty. At more sophisticated levels, when you need to do more work, you can use more formal processes that work with these kinds of context. Each of these processes has a sweet spot, it's own best use, that you can think about as you plan meetings. Blend as necessary.

4. Harvest

Never meet unless you plan to harvest your learnings. The basic rule of thumb here is to remember that you are not planning a meeting, you are instead planning a harvest. Know what is needed and plan the process accordingly. Harvests don't always have to be visible; sometimes you plan to meet just to create learning. But support that personal learning with good questions and practice personal harvesting.

Hosting in a Hurry

Resource 2.11 (cont.)

To harvest well, be aware of four things:

- Create an artefact. Harvesting is about making knowledge visible. Make a mind map, draw pictures, take notes, but whatever you do create a record of your conversation.
- Have a feedback loop. Artefacts are useless if they sit on the shelf. Know how you will use your harvest before you begin your meeting. Is it going into the system? Will it create questions for a future meeting? Is it to be shared with people as news and learning? Figure it out and make plans to share the harvest.
- Be aware of both intentional and emergent harvest. Harvest answers to the specific questions you are asking, but also make sure you are paying attention to the cool stuff that is emerging in good conversations. There is real value in what's coming up that none could anticipate. Harvest it.
- The more a harvest is co-created, the more it is co-owned. Don't just appoint a secretary, note taker or a scribe. Invite people to co-create the harvest. Place paper in the middle of the table so that everyone can reach it. Hand out post it notes so people can capture ideas and add them to the whole. Use your creative spirit to find ways to have the group host their own harvest.

5. Make a wise decision

If your meeting needs to come to a decision, make it a wise one. Wise decisions emerge from conversation, not voting. The simplest way to arrive at a wise decision is to use the three thumbs consensus process. It works like this:

First, clarify a proposal. A proposal is a suggestion for how something might be done. Have it worded and written and placed in the centre of the circle. Poll the group asking each person to offer their thumb in three positions. UP means "I'm good with it." SIDEWAYS means "I need more clarity before I give the thumbs up" DOWN means "this proposal violates my integrity...I mean seriously." As each person indicates their level of support for the proposal, note the down and sideways thumbs. Go to the down thumbs first and ask: "what would it take for you to be able to support this proposal." Collectively help the participant word another proposal, or a change to the current one. If the process is truly a consensus building one, people are allowed to vote thumbs down only if they are willing to participate in making a proposal that works. Hijacking a group gets rewarded with a vote. Majority rules.

Once you have dealt with the down thumbs, do the same with the sideways thumbs. Sideways doesn't mean "no" but rather "I need clarity." Answer the questions or clarify the concerns. If you have had a good conversation leading to the proposal, you should not be surprised by any down thumbs. If you are, reflect on that experience and think about what you could have done differently.

6. Act

Once you have decided what to do, act. There isn't much more to say about that except that wise action is action that doesn't over-extend or under-extend the resources of a group. Action arises from the personal choice to responsibility for what you love. Commit to the work and do it.

7. Stay together

Relationships create sustainability. If you stay together as friends, mates or family, you become accountable to one another and you can face challenges better. When you feel your relationship to your closest mates slipping, call it out and host a conversation about it. Trust is a group's most precious resource. Use it well.

Resources for hosting

Baldwin, Christina. *Calling the Circle: The first and future culture*

Brown, Juanita and Isaacs, David, et. al. *The World Cafe: Shaping our Future through conversations that matter*

Corrigan, Chris. *The Tao of Holding Space: 81 short chapters on the art of hosting Open Space Technology.*

Herman, Michael and Corrigan, Chris. *Open Space Technology: A User's NON-Guide*

Holman, Peggy and Devane, Tom (eds). *The Change Handbook: Large group methods for shaping the future.*

Isaacs, William. *Dialogue and the art of thinking together.*

Kaner, Sam et. al. *The Facilitator's Guide to Participatory Decision Making.*

Owen, Harrison. *Open Space Technology: A User's Guide*

Owen, Harrison. *Expanding our Now: The story of Open Space Technology.*

Whitney, Dianna and Trosten-Bloom, A. *The power of appreciative inquiry: a practical guide to positive change.*

Acknowledgements and contact information

This guide was written by Chris Corrigan for the Vancouver Island Aboriginal Transition Team based on material developed by the Art of Hosting practitioner's community. It would not have been possible without the wisdom, friendship and inspiration of Monica Nissen, Toke Moeller, Kris Archie, Tenneson Woolf, Teresa Posakony, Tim Merry, Phil Cass, Tuesday Ryan-Hart, Caitlin Frost, David Stevenson, Christina Baldwin and Ann Linnea – all of them wise and wonderful stewards and practitioners of the Art of Hosting.

For more information about Art of Hosting, please contact Chris Corrigan at Chris@ChrisCorrigan.com

The Donor-Centric Case & Process

Resource 2.12

Donor-Centric Case Development

Traditional Leadership	Art of Hosting and Living Systems
Mechanistic	Organic
Management by control	Leadership by trust
Executing procedures	Innovating process
No single person has the right to answer	Together we can reach greater clarity
Somebody has to decide	Intelligence through diversity
Silos / hierarchical structures	Networks
Leading by instructions	Leading by hosting
Top—down orders, often without full information	Top-down orders informed by consultation
Work without clear purpose, jump to conclusions	Collective clarity of purpose is the invisible leader
Motivation via carrot and stick	Motivation through engagement and ownership
Seeking answers	Seeking questions
Results—oriented	Purpose-oriented, the rest falls into place
Chairing, reporting	Hosting, harvesting, follow up

Annual Pledge Campaign: Leadership & Campaign Preparation



Stewardship Leadership

Recruiting, encouraging, training, and managing lay leadership for the purposes of raising money, or raising membership is essential to the health and mission of a church. This means that the very best, most effective, and most able lay leadership must be carefully recruited and carefully maintained. This posture may encourage envy and even competition among staff and clergy who are all seeking to recruit effective, kind, intelligent, and spiritually grounded lay leaders. There is a hierarchy of need in effective nonprofit management. At the top of that need is the effective leadership needed to lead and to raise money and people. Tensions of limited lay human resources need to be curated carefully.

In small churches, burnout of leadership is also a primary problem; however, unless we place our focus on effectively raising money and people for mission, we will starve the potential of a church. Once recruited, leaders working in resource development need to be cared for carefully. This is a spiritual front-line in our culture and in this time. So the stewardship officer, rector, bishop, or lay leaders raising money need to be very carefully cared for in body, mind and spirit. We suggest teaching on Rule of Life, Sabbath, and Prayer as primary and regular topics for formation of leadership.



FEARLESS TIP: For other material on pledge campaign management, see *Fearless Church Fundraising*, Pages 132-147.

Notes:

Stewardship Commission & Related Committees

Resource 2.13

Mission and Vision Statements

The mission of **the Stewardship Commission** is to create, plan and build a ministry of asking and giving that transforms our approach to resource development in ways that foster and strengthen our collective desire to give and to fund the collective discernment of mission as well as invite new visitors to the church for membership discernment. We will encourage and support the missions of the five stewardship committees: planned giving, invitation, major gifts, the art of hosting meaningful conversations, and hospitality to provide the necessary resources to support Christ Church's mission to know Christ and to make Christ known.

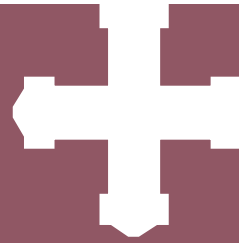
The mission of **the Planned Giving Committee** is to educate around the need and importance of planned giving; to encourage participation in planned giving, and to ensure good stewardship is demonstrated through planned gifts to the ongoing and future mission of the church.

The mission of **the Major Gifts Advisory Committee** is to manage the process by which church members consider, discern, and make major gifts to the mission of Christ Church. The committee will identify those members of the church community who can make such gifts in coordination with the planned giving committee and will oversee the process by which major donors are informed, encouraged, and invited to make investments in the mission of the church now and into the future.

The Invitation Committee seeks to use existing and new structures and habits to facilitate the community and new member invitation process in an open space which fosters meaningful conversations that will enable individuals and the congregation to turn outward in a stance of invitation and welcome. The Invitation Committee works to design and implement the Come and See Invitation Campaign annually each spring so that the congregation is trained in the invitation process and so that members pledge conversations they will have with potential invited guests to Christ Church.

The mission of **the Art of Hosting Meaningful Conversations Committee (known as AofH Committee)** is to teach, invite, encourage, host, and harvest meaningful conversation about the collective longings for the life and future of this church community; and through holding open space, careful listening, reflection, and discernment, reflect back and bring to life those longings in our shared community by orienting conversation within participatory leadership models.

The mission of **the Hospitality Committee** is to manage and oversee the many forms of hospitality central to the particular ministry of a church in a major city. From Sunday gatherings to special events to regular meals, Christ Church serves thousands of meals annually employing the gifts, talents, and hard work of hundreds of gifted volunteer cooks, bakers, and event planners who plan for, shop for, carry, cook food, and clean kitchens for the ongoing gathering of communities which meet for nourishment: physical, spiritual, and relational.



Volunteer Job Description: The Stewardship Commission

The Mission

The mission of the Stewardship Commission is to create, plan, and build a ministry of giving that transforms our approach to resource development in ways that foster and strengthen our collective desire to give and to fund the collective discernment of mission as well as invite new visitors to the church for membership discernment. The commission oversees the raising of pledges in the fall, people in the spring as well as philanthropy and hospitality year-round. In addition to campaign design, evaluation, and oversight, the commission will encourage and support the missions of the five stewardship committees:

- planned giving
- invitation
- major gifts
- art of hosting meaningful conversation (participatory leadership)
- hospitality

The Work

Members of the Stewardship Commission are charged with collaboration with the Stewardship Chair, Vestry, and Rector in ensuring the success of the annual pledge campaign alongside caring for the oversight of other committees whose work contributes to various aspects of resource development for the fueling of God's mission through Christ Church.

The Hopes

It is hoped that Stewardship Commission members will attend regular meetings of the commission. It is the commission's norm to gather over a simple meal which begins and ends in prayer and which manages all aspects of a year-round pledge campaign planning and implementation program in addition to oversight of committees to which most members of the commission are in a liaison relationship for their committee support, creativity, encouragement, and resource provision.

The Skills

The commission is populated with 8 to 15 leaders from within the congregation, is overseen by a Commission Chair, and is served by the work of the Stewardship Chair and staff. The commission requires leadership that involves creative design, effective management, kind-hearted encouragement, and measured objectives; all in a context of God's mission engaging the church's ministry.

The Expectations

The Stewardship Commission members are asked to be people of prayer in whatever forms that takes in their spiritual practice. The commission is asked to pledge and to consider planned giving at some point if that philanthropy suits their plans. The commission members are invited into a stunningly enjoyable, relational, and rewarding ministry of design and oversight among some of the most gifted and committed leaders in the congregation.

Annual Pledge Campaign: Leadership & Campaign Preparation



Notes:

Campaign Preparation

One of the greatest failures in both stewardship and membership growth is that these functions in our churches are not planned by lay leadership, owned by lay leadership, or invested into by lay leadership. Fear causes procrastination which, in turn, weakens how we raise money in the fall, and how we raise people in the spring.

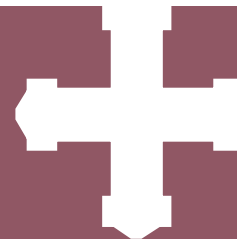
The analysis of metrics and the establishment of planning calendars with measurable objectives are both essential to the effective leadership of, and management of a successful campaign to raise either money or people in either stewardship or membership growth.



FEARLESS TIP: For other material on preparation and planning for the annual pledge campaign, see *Fearless Church Fundraising*, Pages 67-75.

Pledge Campaign Task Flow Calendar

Resource 2.14



Planning should be done with measurable objectives. Where possible, list dates for completion and names of those held responsible for completion. This is a master planning document and so should be revised throughout the campaign to add items which need to be accomplished. It is both plan and archive so that new plans do not need to be re-invented by new leadership year after year.

December	The end of last year's annual campaign is marked with careful gift acknowledgement. Thank you letters are sent. The thank you letters, phone calls and notes are simultaneously the last event of the last campaign and the first event of the next campaign. This process is a hinge and the two campaigns overlap here like a <i>mandorla</i> .
March	Open staff and lay leadership input and creative conversation hosting on design, theme, content, schedule of campaign
March	<p>Hand written thank you notes, written after the formal thank you letters and written by a recruited team of lay volunteers (peer to peer) end the thank you process for the last gift and begin the first cultivation of the next gift.</p> <ul style="list-style-type: none"> • Recruit Advance Campaign Chair. • Design advance campaign letter system, schedule, goals, and case materials. • Review advance campaign prospect lists to determine special asks for major gifts. • Tell Vestry/Bishop's Committee that you will be expecting early pledges as an act of leadership and modeling.
April/May	Write an article and publish: how the last campaign went and an introduction to the next campaign. What went well? What was funded? Why was their gift valuable to mission?
April	First quarter collections/thank you letter to all donors confirming pledge and confirming amount paid and amount still due (note: all collections letters need to look like thank you letters but include pledge payment status. These letters end when the pledge is fully paid.)
April	<p>Detailed campaign theme collaborative input</p> <ul style="list-style-type: none"> • Two world café input sessions with staff and clergy • Two theme conversations with stewardship commission • Two conversations with lay leadership
May	Pledge campaign theme and case material design generation — discernment of the stewardship commission/committee, clergy, program staff, and committee chairs

Pledge Campaign Task Flow Calendar

Resource 2.14 (cont.)

May	Case materials production. Brainstorming of possible Ministry Minute speakers. Develop list and then refine for recruitment.
June	Planned Giving Sunday and Event. Ministry Minute leaders are recruited. Ministry Minute speakers are recruited (8 plus two understudies).
June	Advance campaign launch. Sunday or weekday adult formation regarding money, gratitude, and personal budgeting/financial wellness is designed for fall Sundays/weekdays.
June	Phone-a-Thon is designed and planned. Recruitment for October events begins.
July	Plan campaign special events. <ul style="list-style-type: none"> • Kick-off: menu, volunteers, event plan, budget, and secure leader. • Campaign ending dinner (all congregation): menu, volunteers, event plan, budget, and secure leader.
July	Second quarter collections/thank you letter to all paying donors, confirming pledge and confirming amount paid and pending due. No letter sent to paid pledgers.
August	Campaign direct mail warm-up letters to all non-advance campaign prospects. Phone-a-thon callers are recruited. Advance campaign ends and all remaining prospects are called to secure pledge early. Liturgical writing is completed: A collect for the prayers of the people, an announcement draft, and a bulletin draft are written — adjusted for real-time as they are inserted.
Aug. 1 - Sept. 15	Ministry Minute one-on-one sessions for editing. Drafting of Weekly: collects, bulletin announcements and celebrant announcements (themed weekly from Ministry Minutes).
September 1	Campaign Brochure and pledge cards direct mail sent.
September	Phone-a-thon team coaching.
Mid-September	Stewardship Campaign Kick-off.

Eight Weeks of Ministry Minutes:

1. September
2. October
3. October
4. October
5. October
6. November
7. November
8. November last Sunday before Thanksgiving

October	(3 weeknights and two Saturdays) — Encouragement Phone-a-thons.
October	Third quarter collections/thank you letter to all paying donors confirming pledge and confirming amount paid. Kick-off: menu, volunteers, event plan, budget.
November	Second week — dinner recruitment and LYBUNT gift request remaining phone-a-thons.
August – November	Thank you letters are sent within 24 hours of a pledge arrival. <ol style="list-style-type: none"> 1. Letter notes amount of pledge and payment plan confirmation (Rector). 2. Second letter sent from Warden. 3. Handwritten note follows in lay handwritten note project in January.
November	Victory Celebration Stewardship Dinner (goal: 100% of attending families have pledged and increased pledge).
November	Pledge Blessing Sunday — seeking all pledges in by this date. Sunday before Thanksgiving and after Stewardship celebration dinner.
November	Year-end letters (December 15 – 29) and bulletin inserts/Sunday announcements designed / produced, leader recruited.
November 26	Thanksgiving letter thanking donors for coming to the stewardship dinner (or “we missed you” letters are sent) to attendees.
Late November after Thanksgiving	Fourth quarter collections/thank you letter to all paying donors confirming pledge and confirming amount paid.
Mid-December	Year-End letter and brochure sent to all donors and donor prospects (members).

Pledge Campaign Task Flow Calendar

Resource 2.14 (cont.)

January - February Campaign evaluation.

Thank you note letter-writing campaign.

Next campaign design phase begins with input sessions, theme development, focus group input programs, and date planning.

1. Schedule.
2. Recruitment.
3. Thank you process is being reviewed.
4. Metrics of last campaign reviewed.
5. Campaign themes imagined.

Annual Pledge Campaign: Leadership & Campaign Preparation



Ways to make a pledge or gift

1. Online or App based.
2. Kiosks — pledges, status, payments.
3. Event-based pledging.
4. Quick response QR codes in print resources.
5. Special events — payments, pledges, quick response.
6. Every-member canvases, etc.
7. Special gift solicitation.
8. Pledges linked to engagement.
9. New member orientation follow-up.

Notes:

Annual Pledge Campaign: Advance Campaign



Notes:

Advance Campaign Overview

The advance campaign makes it possible to harvest the low-hanging fruit of core pledges early.

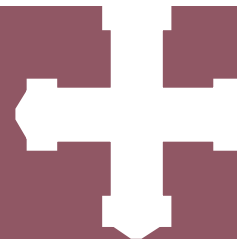
This accomplishes two goals:

First, the campaign is extended out in front of the standard 8-week campaign as money is raised from those people most ready and willing to make their pledge as a bold act of leadership precisely because of their leadership.

Secondly, the advance campaign allows leadership to focus on the rest of the community during the eight weeks of campaign management. With early, easy pledges received, particular focus can be applied to those congregants who need particular care and help in order to either make a new gift or increase a gift. The advance campaign also establishes early momentum and early confidence.

Sample Advance Campaign Plan

Resource 2.15



Advance Campaign Chair: _____(name)

Goal

Early solicitation of pledge from chapter, vestry, vestry college, committee chairs, committee members, members of the planned givers' group and some of the 50 major donor prospect families.

Goal is 100% pledged by September 1.

Timeline

May — Campaign case drafted and produced, vestry approached by Chair to request early pledge, and present Advance Campaign

May — Vestry told that they are being asked to make an advanced 2016 pledge in May and June, prior to the community pledge campaign September - November.

Mid-May — Drafts of letters are written (specialized opening paragraphs for each group with general letter body content for all groups)

Mid-May — Advance Campaign Chair approves letters (most letters jointly signed by Advance campaign Chair and Canon Steward)

Mid-May — Warm-up letters* to vestry sent (Vestry letters sent over signature of Senior Warden, Advance Campaign Chair and Canon Steward)

June — All remaining warm-up letters* (vestry college, committee chairs, committee members, members of the planned givers group) sent

Mid-June - Mid-August — Telephone solicitations and thank you letters managed to completion of advance campaign pledges from all advance campaign prospects.

*(Note: In August, Major donors will be approached with specific plans determined on consultation with the Chair of Major Gifts Advisory Committee, (name). Major Donors will only receive warm-up letters if they are in one of the group names above and even then, these letters and calls will be flagged and reconsidered in each specific case.)

Sample Advance Campaign Vestry Speaking Notes

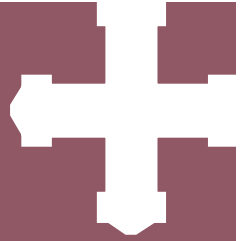
Resource 2.16

Early spring Vestry meeting, given by Advance Campaign Chair:

- The advance campaign is new this year and is an attempt to lengthen the campaign in its collections without lengthening it in the experience of the general congregation.
- Our goal is to tier-step pledging from the following groups in the following order in late spring so that our fall focus is general giving and conversion from non-pledging to pledging:
 - Vestry
 - Chapter and staff (invitation only to staff)
 - Committee chairs and members
 - College of Vestry
 - Planned Givers (July, after planned giving annual event)
- Vestry is being asked to pledge first and to increase their pledge as it is possible.
- Sample: Our Rector (Canon Steward, Campaign Chair, etc.) is giving _____% of his income. I am giving _____% of my income. We welcome you to consider what your income is and discern in your prayer and planning what percentage of your income you would like to give to God in gratitude for God's providence.
- Our Campaign Theme: (details about campaign theme)

Sample Advance Vestry Letter

Resource 2.17



Mrs. Michelle Smith
1350 Washington Street
Denver CO 80202

Dear *MICHELLE*,

Christ Church is entering an exciting time of discovery and transition. Over the next year we will discern who, as the body of Christ, this community of faith is called to be, and how we can make God's abundant love known in the world. And we will seek out a new Rector who shares our vision and will help us reach our goals. This is a pivotal year.

As a leader in the congregation, you know how important it is that we carry the momentum we have built over the last several years into and through this time of discovery and transition. That's why we are writing to you. Last year, the Vestry pledged \$55,000 and this year, we are asking the Vestry to pledge before the public phase of the annual campaign in the hopes of raising \$60,000 - 70,000. We recently discussed this at the May Vestry meeting and will again at the Vestry meeting in June. We are asking that the vestry enjoy and celebrate 100% advance Vestry pledging by Monday, June 15th so that we can, with integrity, move to the next level of leadership for advance pledging in July from the College of Vestry, staff, and committee leadership. Your early pledge of support during this advance campaign will send a message of optimism, enthusiasm, and growth as we begin the work of discerning our future as a loving, kind, and effective church.

This year we will be asking the congregation to increase their pledges as a bold statement of support for the life and mission of our church. We hope you will consider increasing your pledge during this advance campaign. Doing so will impart the integrity of having first done what we will, together, be asking the congregation to do during the public phase of the campaign.

Would you please use the enclosed pledge certificate to make an advance leadership pledge in June? And, having considered what percentage of your income your pledge represents, would you discern increasing your pledge to the capacity of your own bounty as an act of gratitude? It will feel great! And it will fund valuable ministry in our church and in our city.

With gratitude for your consideration,

Susan Ross
Advance Campaign Chair

Estelle Costanza
Senior Warden

Advance Campaign Pledge Card (insert)

Sample Advance and Regular Campaign Thank You Letter

Resource 2.18

Dear *JASON* and *JOANNE*,

Thank you for your *YEAR* pledge of \$_____ to the mission and ministry of Christ Church Cathedral. This gift is gratefully received. (Thank you also for pledging so early as an act of courage and leadership — paving the way for a tremendous and wonderful pledge campaign next fall. ———Delete for non-advance campaign pledges please.)

You have invested in powerful work in this city and beyond, among thousands of people whose lives are touched daily by our mission to know Christ and make Christ known. Each person touched by this church's mission is like a pebble dropped in a pond — with many rings of love, compassion, and connection emanating within and outward to the larger community. You are funding our hosting, healing, reconciliation, and worship.

- This gift will make it possible for hundreds of people like Jean to be laid to rest in a funeral worthy of her decades of work, worship, and love in this community.
- Your gift will change lives like Jacob's, whose character was formed in this church, providing a second family, and sending him off to college prepared to face his life with a strong faith.
- Your gift made David's baptism possible so that he grows up marked as Christ's own forever and in a community of faith with Godparents and parents prepared to support his formation and growth.
- Your gift provides hundreds of beds for women like Mary, whose circumstances have left her homeless; and your gift provides more than 7,000 meals to homeless women and others inside and outside this church annually.

And you fund electricity to light our liturgies, heat to warm our meetings, clergy to visit those sick and imprisoned in various types of confinements in life, and on and on and on. Jesus said, "do this in remembrance of me." Never has a command been so followed for so long and funded by so many.

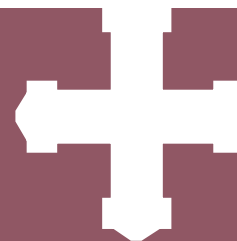
Thank you and please know how glad we are to be in this partnership of ministry with you though this Gift to God we call a pledge to mission.

Susan Ross
Advance Campaign Chair

Estelle Costanza
Senior Warden

Non-Givers Pledge Campaign is Coming Letter

Resource 2.19



Dear JASON and JOANNE,

There are as many reasons to come to church as there are people sitting in our pews. The man over there, perhaps he feels a special communion with sacred music, and his heart soars with the first notes of his favorite hymn. That woman further up, maybe she's facing a difficult illness and craves a few words of comfort from her favorite clergy member. And you — what brings you to Christ Church? Does standing with the congregation as the celebrants file in amidst a cloud of incense fill you with the Holy Spirit and make you feel closer to God? Does the opportunity to do some good through one of the church's many ministries provide a bright note of hope in a difficult week or month?

Whatever your motivation, we are glad you are with us and appreciate your involvement in the life of our parish. And now, I am going to ask you to consider furthering one of the bonds between yourself and these sacred walls. I am asking you to support the lifeblood of our church in the form of a pledge. Our pledges are a promise that this church family, of which we are a part, is a family to which we will make a planned commitment. Even a pledge of \$25 - \$50 per week would help us to plan for the many ways we serve our congregants and those people outside our church walls who need our help. As you know, our support of the church, in the form of our annual pledge, is not a fee for services rendered, nor is it to be construed as club dues for church membership. Rather, it is a symbol of our having given our lives over to God in gratitude for having been given them.

If you were able to attend last year's gala dinner, you know what a delicious night of faith, fellowship, fun, and good food we all shared. We are planning an even more special event this year, so please reserve these dates today.

Campaign Kick-off Breakfast
NAME OF EVENT Dinner Gala

DATE AND TIME
DATE AND TIME

There are two other events of which I ask you to take note. One is our annual parish celebration, which will feature a block party barbecue for 1,000 of our closest friends and neighbors, and the other is our Dream Together Conference, which will focus on our longings for the future of our church.

Christ Church Barbeque
The Dream Together Conference

DATE AND TIME
DATE AND TIME

As you enjoy these summer weeks, please be praying, thinking and discussing your commitment to the lifeblood of our church. On the one hand, it is vital to our ability to fulfill our mission; on the other, it is a very important symbol of the bounty of your life.

Wishing you a restful summer, I am and remain, faithfully yours,

Ruthie Cohen
Stewardship Chair

Previous Givers Pledge Campaign is Coming Letter

Resource 2.20

Dear *JOHN* and *JANE*,

Your support of the Christ Church's ministry is a form of Jesus' hands and feet both within and outside our sacred walls. You support ministries including pastoral care, formation for all ages, outreach ministries, worship, transformative events in people's lives such as weddings and funerals — the list is long and is a worthy investment. Thank you. We have so many individuals who depend on us in countless ways, which we could not begin to serve any of them properly without the generosity of spirit you have shown with your support. For that, we offer our sincere and profound thanks.

As you know, our support of the church, in the form of our yearly pledge, is not a fee for services rendered, nor is it to be construed as dues for church membership. Rather, our pledge is a symbol of our having given our lives over to God. Our pledge is a promise we make to ourselves and to the congregation to share our resources for the spiritual and physical well-being of others.

As we begin to address the needs of our congregation and the people of this city in *YEAR*, and to determine how we can best meet them, we hope you will stand with us again to invest with a discerned pledge. We have a series of awareness events planned to celebrate our giving-awareness season:

Campaign Kick-off Breakfast
NAME OF EVENT Dinner Gala

DATE AND TIME
DATE AND TIME

If you were able to attend last year's dinner, you know what a wonderful and delicious night of faith, fellowship, fun, and good food we all shared. We are planning an even more special event this year, so please reserve the date now.

There are two other events of which I ask you to take note. One is our annual parish celebration, which will feature a block party barbecue for 1,000 of our closest friends and neighbors, and the other is our Dream Together Conference, which will focus on our longings for the future of our church.

Christ Church Barbeque
The Dream Together Conference

DATE AND TIME
DATE AND TIME

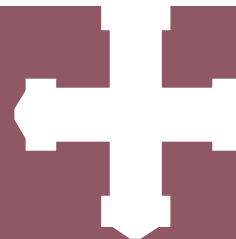
As you enjoy these summer weeks, please be praying, thinking, and discussing your commitment to the lifeblood of our church. On the one hand, it is vital to our ability to fulfill our mission; on the other, it is a very important symbol of the bounty of your life.

Wishing you a restful summer, I am and remain, faithfully yours,

Ruthie Cohen
Stewardship Chair

Sample Pledge Card

Resource 2.21



A CALL TO LOVE

A FINANCIAL & FAITH COMMITMENT FOR 2016

2016 Christ Church Pledge Certificate

Having prayed about this annual pledge to fund the mission of Christ Church in 2016 and in the context of gratitude for all that God has given to me/our family, please be advised of the 2016 pledge of

\$ _____ Yearly

during the next fiscal year (January 1, 2016 to December 31, 2016).

(I/we realize that in the event of a financial problem in 2016, we can confidentially adjust our pledge by calling the clergy).

Signature(s)

Date

Name(s)

Address

Email

Phone

I/We intend to give: (a weekly pledge is very helpful in our financial planning!)

☐ Weekly ☐ Monthly ☐ Quarterly ☐ Full Amount Yearly

By: ☐ Automatic Bank Transfer ☐ Credit/Debit Card Giving ☐ Offering Plate Giving

☐ I/We are interested in making a separate gift (in addition to the annual support listed above) to a specific project for which funds are needed. Please have the clergy contact me about having this conversation.

☐ I/We are interested in receiving information about planned giving (estate planning, charitable trusts, making a will or living will, etc.) Please contact me/us about this by sending literature which will help to inform my/our planning.

THANK YOU

FOR YOUR COMMITMENT

You will be sent a letter confirming your pledge in November 2015 and a letter for your tax use reflecting your 2016 contributions in January 2017.

Please send your completed pledge card to:

Stewardship Campaign
Christ Church
815 Church Street
Episcopal, CO 77701

You may also pledge online
at Christchurch.org/pledge

Christ Church

Annual Pledge Campaign: Communications & Case Development



Notes:

The Campaign Communications Plan

Jesus came to earth as the Word, not the idea.

Words are important.

One of the chief weaknesses of campaigns to raise money (pledges) or people (membership) is the weakness of communications strategy, design, and implementation. The church is used to assuming people will pledge or join simply because they always have. That is no longer true. Other agencies doing effective and powerful work in the world are able to communicate why people should make philanthropic investments and why people should join communities of mission. The ability to communicate effectively will support any ability a church may have to raise money or people. Too often, churches communicate in case-development and their self descriptions are only aspirational hopes rather than the actual, truthful, measurable effectiveness they are able to prove in a particular place and time as a church. A communications plan, whether for a small church or a large church, is essential to support financial development and membership growth.



FEARLESS TIP: For other material on pledge campaign materials: see *Fearless Church Fundraising*, Pages 121-131.

Communications and Stewardship Campaign Management

Notes:

1. Craft your campaign theme/slogan.
 - a. Listen to God's mission in which you are involved.
 - b. Listen to people talk about your church's ministry, mission, and impact.
 - c. Pray about the ability to hear a call to a theme.
 - d. Look for the vision.
 - e. Look for images.
 - f. Host Conversations.
 - i. Brainstorm
 - ii. Focus group
 - g. What are you known for in the community?
 - h. What do you want to be known for in the community?
 - i. How does this intersect with what Jesus asks us to accomplish? (God's Mission)
 - i. we do a great job at_____
 - ii. we can accomplish this thing that other area non-profits cannot do
 - iii. make this a story about why you exist and why that existence should be funded.
2. Discernment of your Campaign Theme:
 - a. Schedule coffees, small group focus groups, brainstorming sessions, crock pot conversations.
 - b. Look for a quote from a hymn, a song, an ad, a ministry minute speaker, etc.
 - c. Look at your life together right now: what is about to happen and how do you want that happening to be funded?
3. Crafting the final decision about your case.
 - a. Keep it simple and to one message.
 - i. A Call to Love
 - ii. Love, Care, Give
 - iii. Cream of My Heart
 - iv. Living Out the Image of God: Creator, Lover, and Giver

Annual Pledge Campaign: Communications & Case Development

Notes:

Communications and Stewardship Campaign Management (cont.)

v. Sowing Seeds of Hope

vi. More Than Enough (pile of cookies)

4. Use your message content: Communicate!

- a. Know your people.
- b. Keep an eye out for talent and recruit and thank and thank and thank.
- c. Cultivate volunteers the way you cultivate major gifts — relationships.
- d. Your brand is not your logo! Your brand is the combination of who people say you are and who you know you are (Do you deserve the money you think you want to raise?)



Case-for-Support Brochure: How to Develop

Design

Your brochure doesn't need to be outsourced. You can utilize a number of standard programs to design your own brochure from a template. Word, Publisher, even Powerpoint. Or partner with a graphic designer in your community and utilize InDesign or Quark. This manual was created with InDesign.

Cover

Show photos of life going on in your parish or photos/graphics that help represent your theme. Don't forget your parish logo and the theme of the campaign.

Content

Tell your story through the theme lens. Maybe use:

- 3rd person narrative.
- the voice of a child who is thanking the parish for his future spiritual home.
- a collection of first person narratives from parishioners.

Response

Mailing lists: is it clean? A better list equals better communication — your best friend is your list. Include a return envelope with postage to return the pledge. Also have online pledging available as an option.

Quality

Strive for excellence. If the animal shelter is seeking a pledge from you, and they gave you an awfully designed brochure covered with 6 different fonts and clip art of cutsie little puppies and kitties, would you be inspired to write a big check? If it isn't up to your standards of excellence, go a different route.

Website

INVEST in your website; build in capabilities to allow interaction. More people will look through your website than will read your brochure.

Other Campaign Messaging

eNewsletters, Bulletin Inserts, Sermons, Verbal Announcements, Potty Posters, Banners, etc.

Notes:

Annual Pledge Campaign: Communications & Case Development

Notes:

Sample Campaign Communications Plan

1st week of February	Campaign Plan Schedule is drafted.
1st Week March	Write articles on stewardship campaign, hosting conversation, & discernment.
3rd Week March	Plan campaign theme, begin crafting graphics and materials.
3rd Week of April	Annual pledge campaign materials drafting.
1st Week of May	Write articles on formation & hosting conversation.
2nd Week of June	"Campaign is Coming" letter to members and prospects.
3rd Week of June	Advance campaign begins (Vestry, College of Vestry, Staff, & Clergy).
1st Week of July	Write articles on stewardship campaign and major gifts.
2nd Week of September	Campaign celebration save the date card sent (printing & postage).
2nd Week of September	Pledge cards (to printer to hit mailboxes by Kickoff).
8th Sunday before Celebration	Stewardship campaign kickoff, Ministry Minute 1.
4th Week of September	Ministry minute speaker media post w/ link to pledging online.
4th Week of September	Online rollout of stewardship campaign on website and social media.
4th Week of September	Postcard stewardship Mailing 1 sent (printing & postage).
4th Week of September	"Did you Know?" — past/current year accomplishments media post.
4th Week of September	"What I Love about our ministry" media post.

7th Sunday before Celebration Ministry Minute 2

Ministry minute speaker media post w/ link to pledging online.
 “Did you Know?” — past/current year accomplishments media post.
 “What I Love about our Ministry” media post.
 eNews Ministry Minute with pledging link.

6th Sunday before Celebration Ministry Minute 3

Ministry Minute speaker media post w/ link to pledging online.
 “Did you Know?” — past/current year accomplishments media post.
 Postcard stewardship Mailing 2 sent (printing & postage).
 “What I Love about our Ministry” media post.
 eNews Ministry Minute with pledging link.

5th Sunday before Celebration Ministry Minute 4

Ministry Minute speaker media post w/ link to pledging online.
 “Did you Know?” — past/current year accomplishments media post.
 Campaign wrap up event invitation postcard sent (printing & postage).
 “What I Love about our Ministry” media post.
 eNews Ministry Minute with pledging link.

4th Sunday before Celebration Ministry Minute 5

Ministry Minute speaker media post w/ link to pledging online.
 “Did you Know?” — past/current year accomplishments media post.
 Postcard stewardship Mailing 3 sent (printing & postage).
 “What I Love about our Ministry” media post.
 eNews Ministry Minute with pledging link.

3rd Sunday before Celebration Ministry Minute 6

Ministry Minute speaker media post w/ link to pledging online.
 “Did you Know?” — past/current year accomplishments media post.
 “What I Love about our Ministry” media post.
 eNews Ministry Minute with pledging link.
 Finalize all End of Campaign Event designs & print materials.

2nd Sunday before Celebration Ministry Minute 7

Ministry Minute speaker media post w/ link to pledging online.
 “Did you Know?” — past/current year accomplishments media post.
 Postcard stewardship Mailing 4 sent (printing & postage).
 “What I Love about our Ministry” media post.
 eNews Ministry Minute with pledging link.

Notes:

Annual Pledge Campaign: Communications & Case Development

Notes:

Last Sunday before Celebration Ministry Minute 8
Ministry Minute speaker media post w/ link to pledging online.
“Did you Know?” — past/current year accomplishments media post.
“What I Love about our Ministry” media post.
eNews Ministry Minute with pledging link.



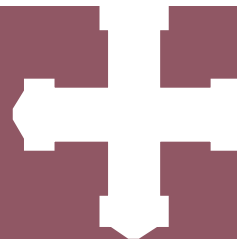
FEARLESS TIP: For other material on case discernment, see *Fearless Church Fundraising*, Pages 76-83.



FEARLESS TIP: For other material on pledge campaign case development, see *Fearless Church Fundraising*, Pages 107-120.

Sample Warm-Up Letter

Resource 2.22



Dear *JOHN*,

You are part of Christ Church, and this church is yours. Please invest in its mission financially when you get your pledge card in early September. Last year you generously pledged \$XXXX and we turned that gift into powerful mission. Now we are asking you to consider your *YEAR* pledge, made in September or October. Thank you.

Made in God's image, we love. Out of our love, we care for others. In order to care for others, we give away some of what we have to fund acts of love at Christ Church and in our city. Our financial gift gives integrity to our work, our creed, our life and our liturgy.

This is an important year for our bold investment into our church's ability to love, care, and give; funding our church for God's mission in Episcopal, Colorado.

It takes courage for me to give away 12% of my annual income to Christ's mission through the church, but it feels great! I preach a lot. But if you want to know what I really believe is important, just look at how I spend my time and my money. Might you consider increasing your pledge, if at all possible, for a powerful year of change and capacity? Our vestry, clergy, staff, and lay leadership have pledged early and boldly this past summer.

Your act of loving, caring, and giving is not only your pledge, but also your opinion and your presence; so please place the Dream Together Conference on Saturday, October 17 and the Campaign Celebration Dinner in the Nave on Wednesday, November 18 on your calendar so that the life and future of our church is formed by your presence and your inspiration.

Warmly and with deep gratitude,

George Steinbrenner
Rector or Campaign Chair

Sample Hand-Written Note

Resource 2.23

Hand-written note to all donors and LYBUNT between warm-up letter and campaign celebration (September – November). This is one of two hand-written note donors receive. The second hand-written note comes at the end of the campaign after standard gift acknowledgement letters are sent; usually February.

Dear *JOHN* and *SARAH*,

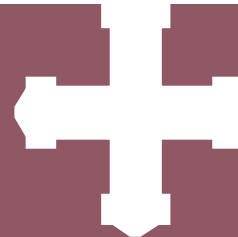
You may have already made your pledge. Or you may be praying and thinking about your pledge now. Regardless, I wanted to write to thank you for the decision accomplished or soon to be. Your gift will make ministry and mission happen in thousands of lives. Thank you for making this decision. See you on November 18th at our celebration dinner!

Warmly,

George Steinbrenner
Rector or Campaign Chair

Sample Auto-Withdrawal Confirmation Letter

Resource 2.24



Sample email to donors giving through auto-withdrawal (bank or card) confirming pledges maintained or increased for YEAR.

JOHN,

I hope you are enjoying your preparation for Christmas!

In YEAR, you generously pledged \$900.00 which has funded extraordinary mission and ministry at Christ Church. It is our understanding that you want your annual pledge to continue to be withdrawn from the credit card ending with 2428. We would be grateful if you would confirm that you would like to continue investing in the work and mission of our church. Please know how grateful we are for your pledge. We hope that you would like to maintain this pledge in YEAR through this automatic monthly withdrawal. We have raised \$1.2 million of the \$1,350,000 we need to do ministry in YEAR and hope that your pledge will be part of those who help us to reach our YEAR pledge goal in December.

Would you please confirm that you wish us to continue deducting payments to your credit card in YEAR? If you would like to increase your pledge, please do not hesitate to let me know.

Thank you for maintaining this pledge to help us reach our goal; and I hope you have a wonderful holiday.

Yours sincerely,

George Steinbrenner
Rector or Campaign Chair

Letter to LYBUNT / PYBUNT Donors

Exit Questionnaire and Engagement Letter

Resource 2.25

(This letter goes to donors who have pledged in past years or last year but did not pledge in the most recent, ended campaign year. If your campaign runs September through November, then this letter would go out in February after you have tried to recruit their outstanding pledge by letter and personal phone calls. When you are sure they will not pledge, send them a letter like this one to ask why they did not pledge so that you can learn from each donor.)

Dear *JOHN* and *JANE*,

In *YEAR*, you pledged \$1,234.00 to Christ Church as part of the pledge campaign, and we remain grateful for that kind and generous support. When we approached you in the most recent pledge campaign, you chose not to make a pledge to the ministry of Christ Church, and so I am writing to be able to learn a bit more about your hesitation to make a pledge.

We want to learn how we may better serve you as a member of this church and as a past donor to its ministries. Perhaps we misspelled your name or perhaps you were offended by something. Perhaps you are unsure of how the pledges are spent or you may dislike some aspect of our ministry. Or perhaps you simply entered into circumstances which made pledging impossible.

Would you be willing to return the enclosed confidential survey or have a telephone conversation with me to let me know more about your decision not to invest in the ministries of our church through a pledge? It would help us to better serve you and it might tell us of changes we need to make which will better serve the life of our church. If you encountered a problem or barrier then perhaps others did as well. Knowing more will help us serve you better.

Thank you for your pledge in past years, and please know that if this letter reminds you that you wish to renew a past pledge, you may do that also by returning the enclosed survey in the return, stamped envelope.

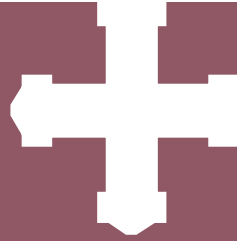
We are grateful for your membership here, and if our records are in any way in error, please let us know and we will work hard to make whatever changes we need to make so that you feel fully involved in every aspect of ministry here. Again, thank you for your time and please know that I will call in the next few days unless I hear from you within this response opportunity.

Warmly and with gratitude,

Ruthie Cohen
Stewardship Chair

Pledge Collections Letter

Resource 2.26



Dear *JOHN* and *JANE*,

Thank you for your pledge of \$ XXXXXX to Christ Church's annual pledge campaign last fall. We surpassed previous year's pledges by 2% and are busy doing ministry throughout the church and the city as a direct result of your investment in the life of the church and its involvement in God's mission.

Our records indicate that

Letter one: insert for those who have paid part of their pledge: "you are very kindly still paying this pledge and have paid \$ XXXXXX so far. We are grateful for that payment."

(If part of the pledge has been paid)

Letter version two for those who have yet to pay anything on their pledge: Insert "you are very kindly still paying this pledge and we look forward to assisting you in any way we can as you pay this pledge throughout the year."

Letter version three for those who have paid their pledge when the pledge was made or in this first quarter, insert: "you have kindly paid this pledge in full for which we are most grateful."

Please let us know if we have made any mistake in this information. If we have your name wrong or if our records of your pledge do not match yours in any way, please do not hesitate to contact ADMINISTRATOR NAME or myself and we will correct our records.

Your pledge, and the payment of it, is making a difference in the lives of those who worship at Christ Church, those who come to our church for solace and for community, and those who need the help of our community. We baptize, we bury, we confirm, we feed, we teach, and we heal; all because of this investment you have so generously made.

Thank you and please know how very grateful we are for your generosity.

Warmly,

Ruthie Cohen
Stewardship Chair

Financial Support Survey

Resource 2.27

4321 Robin Way
Episcopal, CO 77701

Dear *JOHN* and *JANE DOE*,

Please fill out and return this survey or go to ChristChurch.org/FinancialSupportSurvey in order to fill out this survey online. Feel free to call the church to speak with *STEWARDSHIP CHAIR NAME* or *ADMINISTRATOR NAME* if you would prefer to accomplish this work personally by conversation. We are so glad to know how we can better serve your philanthropic and stewardship needs and are grateful for the time this takes from your busy schedule. Please also feel free to email this to *STEWARDSHIP CHAIR EMAIL*.

1. Why did you choose not to pledge to the mission of Christ Church in *YEAR*?
2. What would help you to make a pledge choice in future years?
3. What most excites you when you think of funding various aspects of our mission and ministry? Or what does not excite you, or even frustrates you when you consider making a pledge to the ministry of the church?
4. Has anything occurred in your life either at this church or in your personal life that has mitigated against your ability or willingness to make a pledge to our church?
5. Is there anything else you would like to tell us that would help us to better serve you as a member or as a donor in this church?
6. If you would like to make a pledge now, please write the amount you would like to give this year and print and sign your name. We will follow up with a pledge card and will be grateful for this support.

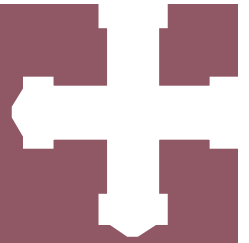
Printed Name

Signature

Amount pledged before December 31, *YEAR*
\$1,234

LYBUNT End of Year Reminder Letter

Resource 2.28



Dear *JOHN* and *JANE*,

Your pledge to the Christ Church's mission and ministry is an essential part of the good work we are doing in this city. Your pledge has done precisely what Jesus asked us to do in the scriptures.

You kindly made a pledge of \$ XXXXXX for the *YEAR* program year and I was hoping you would be willing to pay your pledge balance of \$ XXXXXX.

We have served the homeless. We have visited the sick. We have held the dying. We have fed the hungry both in body and often in spirit. We have inspired the Glory of God through beautiful liturgy. We have also

_____. Your pledge made all that possible, and more.

Our more than 200 pledgers have made a deeply valued commitment to our ministry together. We all have different ways of paying our pledge. Thank you for paying yours when and as you do.

If we are in any way in error, we kindly thank you for helping us to make needed changes by calling _____ at 777.867.5301.

Or if you would like to discuss your pledge, the use of your pledge in our ministry or any aspect of our life together, please call me at 777.867.5302.

Thank you for this investment in our mission together.

Warmly and gratefully yours,

Ruthie Cohen
Stewardship Chair

PYBUNT End of Year Reminder Letter

Resource 2.29

Dear *JOHN* and *JANE*,

May I ask you for a Christmas gift? Will you make a pledge in *YEAR*? Christ Church is humming with energy and vitality, and it is due to people like you! As we wait in Advent for the Christ Child, we are anticipating what we will be able to do as Christ's hands and feet at Christ Church in *YEAR*. You have pledged in the past, and you have made that work possible. We depend on you.

You were very generous to pledge \$ XXXXXXX in *YEAR*. We are very close to our goal. Will you pledge this year, please? Might this pledge be a great way to celebrate Christmas, and make an investment in human lives?

Will you fill out this pledge card right now and just pop it in the mail, or go online to christchurch.org/pledge and take the 70 seconds to make that pledge (I counted how long it takes!) If your financial circumstances change at all in *YEAR*, you can simply change your pledge with an email to me. It's that easy!

Do you know that if everyone who pledged in past years, makes a similar pledge next year, we will raise the final \$ XXXXXXX needed to reach our goal in two weeks and in time to set a budget! Will you please help us to do that? You may be able to pledge more or perhaps not, but your participation is essential so that we may establish a fully — funded budget at our Annual Meeting in early January.

I have enclosed a pledge card and a return envelope. I will call your home or cell in the next few days just to thank you for your consideration. We just have such a short way to go! Please help us all to be prepared for a wonderful *YEAR*!

If we are in any way in error, we kindly thank you for helping us to make needed changes by calling _____ at 777.867.5301.

Or if you would like to discuss your pledge, the use of your pledge in our ministry, or any aspect of our life together, please call me at 777.867.5302.

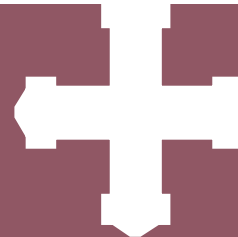
Thank you for this investment in our mission together.

Warmly and gratefully yours,

Ruthie Cohen
Stewardship Chair

Sample Letter to Hand-Written Note Writers

Resource 2.30



Dear *JOHN* and *JANE*,

Thank you for taking the time these next two weeks to write hand-written notes to the donors to our ministry and mission at the church. I go to my mailbox daily and I sort junk mail from bills. Only occasionally do I see real, blue ink on a real note and that envelope seems to glow. It is placed aside, separate, like a sacrament of generosity. Someone actually took time to write to me, with blue ink, from a real pen!

Thank you for making the time (and I know you are busy!) to do this work. It need not be long — just three phrases or more if you are able. All you want to do is cover the following:

- Dear _____ you have made a generous pledge to the mission God is unfolding at and through Christ Church. I am writing to thank you for making that pledge and for providing those funds.
- By making this pledge you have both honored your stewardship of your life and the hard work which is changing lives daily.
- I write on behalf of thousands of people whose lives are informed and improved through this gift you are making. (signature)

As a way to thank you for writing a hand-written note to every pledger to the campaign work, we are hosting a dinner for you and your significant other on _____ at _____'s House at _____ beginning at _____pm. Bring nothing but an appetite, and please do come. It will be a fun night with great food and an opportunity for us to thank you for this hard work you are doing.

Warmly,

Ruthie Cohen
Stewardship Chair

Sample In-Kind Gift Thank You Letter

Resource 2.31

Dear *JOHN* and *JOANNE*,

Thank you for the elegant rug you gave to the Christ Church for our use in the library this year. I am aware that a standard tax gift acknowledgement letter will be sent to you for this gift, and yet I wanted to thank you personally for the rug that so beautifully sets off the other lovely things in such a gorgeous space of welcome, study, and comfort.

As Christmas comes our way, I am aware of the incarnation and of the value God has placed on things of this world. I am also aware of the love of beauty that God so clearly exhibits in creation. Your gift of physical beauty to the church's space set aside for quiet study and reflection we gratefully received. Thank you on behalf of the many who will use this space so much improved by your kindness.

Thank you for your generosity and know that we will put this rug to good use over the decades to come.

Warmly and with deep thanks,

George Steinbrenner
Rector or Campaign Chair

Annual Pledge Campaign: Ministry Minutes & Phone-A-Thon



“Ministry Minutes” Program

“Ministry Minutes” is a case-development and pledge encouragement activity. The program takes careful planning, curating, coaching, and editing, but the end result is tremendous for the health of a church.

What is it?: A series of congregation members, recruited for their authenticity and reputation for kindness, who write and speak 500 words on the subject “Why I love this church” at the Sunday liturgies weekly during the campaign. Most campaigns are 8 weeks (and should not be shorter nor much longer), and so there are eight speakers (a different one each week but the same one at all services on a particular Sunday). Each speaker is recruited and coached in the spring and summer, their 500 words are drafted in the late summer, and they are scheduled for a Sunday during the campaign. They are also asked to distill their 500 words into a 50 word summary.

Why? The laity benefit from being asked to do the drafting, thinking, and writing. Over ten years, 80 people have carefully considered why they love their church. This work cultivates their gift and their involvement. It also reminds the listeners why they love their church. This three minutes in each service is an essential component to any campaign.

How?:

- a. Recruit well and early (before the theme design):
- b. Who is authentic?
- c. Who fits with your brand?
- d. Who does what they say they will do?
- e. What people represent the mission?
- f. Have 500-word statements written by recruits.
- g. “Why I love this church.”
- h. Meet with recruits individually to review statements.
- i. Coach brevity, clarity, one message, authenticity.
- j. Coach fearlessness, prayer, prep, familiarity.



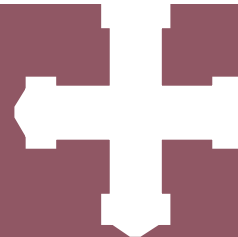
Notes:

Notes:

- k. If they are verbose, too theological, or too spiritual then coach them. Tell them the truth.
- l. Each statement needs to be under 500 words and needs to be finalized after a few drafts. Get comfortable with drafts and revisions. Do not settle until it is perfect!
- m. Highlight the one or two phrases from each statement that you want to use in campaign communications. Does one lend itself to a campaign theme?
- n. Thank the speakers after the campaign.
- o. Meet with the speaker in the week prior to their scheduled presentation so that they can practice at the podium with your critique.
- p. Make sure each speaker has a minder who calls the night before, greets them at the door, and helps them to get through all services.

Sample Ministry Minute Recruitment Letter

Resource 2.32



This letter goes to the lay leader who is charged with recruiting the Ministry Minute speakers.

Ministry Minute Program Recruitment
Annual Pledge Campaign, Summer

The work of the Ministry Minute Speakers in the Annual Pledge Campaign is central to the Case-for-Support and its communications in the live phase of the campaign. The Ministry Minute speech answers the question: “Why do I love Christ Church and my involvement here? The donor’s question as they listen is “Does the church deserve the money they are asking me to donate in the pledge campaign?” Speakers are NOT speaking about why they give but do keep that in mind. Most speakers have a specific thing they love (a central theme) and that theme is designated at the time of the recruitment or negotiated soon thereafter. Each week for 8 weeks, a Ministry Minute speaker will say a few words (about 3 minutes) at the time of the announcements, addressing each of the congregations which meet on that day.

The following notes will assist in recruiting the volunteers being asked to speak the Ministry Minutes:

1. Names of those who might speak with compassion, authenticity, clarity and brevity are listed by a committee. That list is then redesigned under main topics of case development (visited in hospital, raising kids in faith, giving transformation, outreach, beauty, music, etc.)
2. What are you asking a Ministry Minute Speaker to do exactly?
 - a. Each speaker is designated to speak on a specific Sunday and so it is vital that they choose a Sunday that they will be willing to be in church to speak — and not change this commitment except in an emergency of life or death.
 - b. Each Ministry Minute speaker is asked to draft a written statement (3 minutes / 500 words) or sit with a staff person so that from an interview, a draft can be ghost-written for them. This statement must be authentic and natural, but it is a script so that a speaker does not go on too long (beyond 3 minutes), or speak too fast as is often the case when nervous.
 - c. A summary statement (1-3 sentences / 50 words) is then drafted by staff and checked with the speaker. This summary phrase will appear in the campaign literature with the speaker’s photo. These printed and soft (email) materials will be sent to all members and will be on the web site. Speeches will also be on the web site and communicated in some campaign materials.

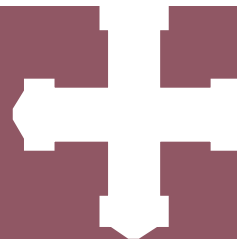
Sample Ministry Minute Recruitment Letter

Resource 2.32 (cont.)

- d. A digital photo of the speaker or speaker and family is taken or identified for campaign materials (above.)
 - e. One session of rehearsal in person or by phone or skype will be set in early September.
 - f. Each Ministry Minute Speaker has his/her own Stewardship Commission liaison who also:
 - i. calls the week before to remind them of their speech and to check on them.
 - ii. calls the night before to confirm that they will be there and where and when to meet them at the door.
 - iii. attends all the services on that day,
 - iv. greets and ushers the speaker after each service to prepare for the next one. Speakers speak at all three services and on front of a camera on the day of their speech).
 - v. makes sure the speaker knows where to sit, what movements happen at the different services, how microphones work, and what to do between services.
3. Thank you for recruiting all eight speakers (eight weeks) and two understudies by Mid-August.

Sample Ministry Minute Recruitment Confirmation Letter

Resource 2.33



Dear *JOHN*:

Thank you for being willing to serve Christ Church by saying a few words about why you love the church and its congregation. I am aware that attending all three services is a hard thing but I hope that for this one Sunday on which you are scheduled, you are able and willing to do so. It will be great for you as leaders to see what the different services are like. I will look forward to speaking with you over the next few days. I know your schedule is demanding with work and family, so please call my cell phone at _____ anytime. If I am busy or it is too late or too early (nearly impossible!!!) then I will let it roll over to voicemail and call you right back. I am usually asleep by 9:00 pm and awake by 5:00 am.

Thank you again for all you are doing to help the church celebrate its life and ministry in this way. Please do not hesitate to call me. Here is the order of upcoming events:

1. You and I discuss your 500 words.
2. You draft your 500 words (a couple of you have already) and we develop summary statements which reflect your full statement. These we will use in postcards and bulletin announcements
3. We polish them and they are proof read for a second set of eyes.
4. Carol calls you sometime soon to invite you to attend one of two meetings in which to be filmed so you can get used to the space, the microphone, the feelings of speaking in such a large space and the sight of yourself on film.
5. A member of the Stewardship Commission will call you the week of and the night before you speak to encourage you.
6. A member of the Stewardship Commission will meet you at the door on the Sunday you speak and escort you through the day; water, snacks, directions, ...whatever you need to be happy about speaking.
7. You speak. You sit and return for the next service of the day until you have spoken at all the Sunday liturgies. Please attend coffee hour so that the congregation may thank you and discuss further their joys about what the church means to them.

The five Sundays for the talks are Oct 15, Oct 22, Oct 29, Nov 5, and Nov 12. If you tell me two dates, giving a first and second choice, I can fit everybody in and then get back to you.

So that's it! Thank you for doing this. I will be in touch in the next 48 hours to work with you on the 500 word content (about 2.4 to 2.7 minutes).

Peace,

George Steinbrenner
Rector or Campaign Chair

Sample Ministry Minute Speaker

Resource 2.34

Here are some tips for you as you plan your Sunday of ____ (#) services:

1. Set the layout of your pages at 20-point type and number your pages on the top right, with wide left and right margins so that you have a column of script in the center of the page. If your eye has less far to go from left to right you will be more peaceful. In the margins you can draw a set of eyes or glasses to remind yourself to look up from your manuscript at key times. You may also want to highlight key phrases in each paragraph so that at a glance you can easily see content summary by paragraph. And lastly, I suggest that pages lay flat on the pulpit lectern (which should be high for ease of manuscript to congregation glances) and be staked on the right and moved, page by page to the left as you finish a page; and that your finger stays with each word you speak as you read so that if you get nervous and miss your place when you look up, your finger points to the next word. Sometimes bending the lower left corner of a page is helpful in removing pages as you speak.
2. The process works this way: The celebrant has people pass the peace. Avoid that and use the time to center yourself and remain calm. Then, as the announcements are said, walk slowly from your chair or end pew seat in front of the pulpit, up the stairs to the left of the left metal railing and position yourself in or near the celebrant's stall or at the end of a pew near the pulpit and sit. When the celebrant ends the announcements, he or she will end them with your introduction at which point you should be smiling and approaching the pulpit desk with your papers ordered with page one on top and place them on the brass pulpit desk. Adjust neither the mic nor the desk. Look out, smile, look down, breathe and then begin. Because we have scripted your presentation at 450 words, you need to speak slowly and clearly with long breaths between sentences without worry about going long.
3. Be natural. Be sure to eat something and drink something so that you do not faint. It can be frightening to speak to a congregation for the first time. Only make gestures and vocal inflections which come naturally, and if you want to break script for an authentic interjection of a word or a repeat for emphasis, fine. But do not interject new phrases or ideas, no matter how compelling, since they will lengthen the presentation and distract you from your manuscript. Look up at people and if you want a fixed point, choose the pew crossing or the back doors. Smile as much as possible and look up as much as possible. One helpful trick when reading in church is to stop for one second after each phrase. It seems like a long pause but it will pace the speech. We often speed up when we are nervous.
4. At the end, look back up at them, smile, then take your pages and slowly make your way back to the pulpit side of the steps and return to your seat, smiling. Keep your manuscript with you at all times all morning so that it does not disappear, and always email me the last and final version so that I can print it out from the church computers if you leave it behind, or it is misplaced at a coffee hour.

Sample Ministry Minute Recruitment Guidelines

Resource 2.35



Goal

Eight speakers plus one (with one under-study in case there is a last minute illness.)

Background

Last year we asked Ministry Minute speakers to answer the following question: “What I love about Christ Church!” with the use of a specific ministry or experience which articulates the love you have for the church, people, and the ministry of the church. The goal of these talks is to remind the congregation that Christ Church is a valuable asset in our lives and into which to make an investment in the form of a pledge. The secondary goal is to speak naturally and authentically, to know the speech so well that eye contact with the listeners is maintained, and to speak slowly and clearly for less than 3 minutes or 500 words.

The speaker is not only telling the congregation why he/she (the speaker) loves the church. The speaker is inspiring within each listener two responses:

1. “I love that about Christ Church as well!”
2. “And there are other things I, the listener, also love about Christ Church!”

Speaker Commitment

1. Write a 500 word statement about what you love about Christ Church (July)
2. Go over that statement with Tom to discuss content, flow etc. (Early August)
3. Work with Tom and Leo to develop a 50 word statement which flows out of your presentation and which can be used in the Discernment Booklet (Early August)
4. Have your photo taken by Cindy for the Discernment Booklet (July or Early August) (we will not use directory photos for this initiative.)
5. Work with Tom and others to decide which Sunday you are speaking.
6. Arrive at 7:45 am to check—in with your Stewardship Commission Host on the Sunday on which you are speaking (at announcements from the Pulpit). Speak at all three morning services.

This Year's Theme

The theme of the campaign is focused on our pledge being a symbol of our gratitude for all God has given to us. ...Ect. Ect.

Speaking to the upcoming *YEAR* fall campaign “What I love about Christ Church” with this year’s theme, a speaker might consider the following questions to inform their presentation:

1. What bounty exists in my life which flourishes because I am a part of the Christ Church community?
2. How does my involvement and my pledge at Christ Church represent the best offering I have for God’s glory and mission?
3. How does my experience of Christ Church represent a richness in my life?
4. How is Saint John’s a church that is engaged in unveiling God’s mission in our city, our state, and out world?
5. How does the richness of Saint John’s love and compassion, service and kindness translate, in my own experience, into serving the poor and marginalized of the city?
6. How is giving from my heart different from simply giving money to a non-profit like the museum or the YMCA?
7. How does my pledge and my involvement at Christ Church translate into being Christ to the people of the congregation and the people of our city?

Preparation and Discernment

One way to get to the answer around “what I love about Christ Church” is to back up and ask these questions as a way to prepare:

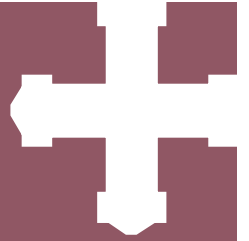
1. “What would be missing in congregant’s lives were the church to disappear?... What in the community’s lives?”
2. “What is that one experience I had this year which froze me in my place and reminded me that I love this church community?”
3. “If I had only two minutes to tell a friend why I go to Christ Church, what would I say to motivate them to come to church and check us out?”

About The Spirituality of Inspiration

We remember that Jesus came to us as The Word. Words are important to God. God created the world with them. Inspire means in + breath, and so the word comes from our theology that the Holy Spirit breathes into us the words we need when we need them. This work speakers are doing is foremost evangelism and secondarily financial development. We are grateful to our speakers. The Holy Spirit will assist them as they write and edit what they have written.

Sample Guidelines for Hosting a Ministry Minute Speaker

Resource 2.36



1. Connect with speaker, mid-week to verify they are ready for Sunday. Remind the individual of the timing of each service.
2. Call each speaker on Saturday to again confirm all is a go for Sunday.
3. Arrange to meet with the speaker at approx 15 minutes prior to service to walk through the logistics. Bring a bottle of water and possibly some type of snack for the speaker.
4. Sit with him/her during the service. Have something on a pew/chair to reserve your spots no later than 15 minutes prior to each service.
5. Ensure he/she goes up to the front based on the pre-determined timing of the service.
6. Send him/her a thank you note the following week.

Sample Ministry Minute Script 1

Resource 2.37

John Doe, Ministry Minute Speaker

Everyone look up. What you will see is stone: strong, mighty, unchanging, static. Believe me, I could stand here and talk for a while about what a privilege it is to worship in this giant rock that we have decorated into a church. But I believe that the cold, motionless stone hides the true nature of this place because, in truth, the community of Christ Church shares more in common with a river than a stone behemoth. I say a river because rivers do one thing very spectacularly: they flow. They, by their very nature, are always in motion, always ready to go to new places and do new things. The same is true of Christ Church. I've only been here for a couple years, but in that time, the dynamic and kinetic nature of this community has truly been life-changing.

There's a phrase: "Come as you are," that this community has truly lived out. I don't believe I am alone in noticing how radically welcoming Christ Church is to everyone who wants to be part of this place. Saying "Come as you are" is only half of the story. Don't just come as you are, but leave transformed. It's in the transformation that this community has its true power. It's in the act of changing lives that Christ Church has any meaning. This is a gorgeous stone that we're sitting in right now, but that beauty would mean nothing if this church sat empty. What gives this place meaning is that so many people can flow through those doors, and on some days overflow, and be transformed by the energy and passion that this community radiates. That's why what we're doing here matters.

So we're asking you to take part. Be a part of this community, take your place in the vibrant flowing river that flows here. There's a reason we call this act 'pledging', because it is the act of pledging one's self to the ministry of this church. It is the act of pledging your best to the work this community can do and the lives it can change. Everything this church has ever done, for you, for me and for countless others is by the generosity of those who could not bear to be static, but instead chose to be vibrant. All that we ask is for you to make a pledge and join them.

Sample Ministry Minute Script 2

Resource 2.38



Jane Doe, Ministry Minute Speaker

If anyone had told me three years ago that I'd be standing up here today extolling the virtues of a church, I'd have asked them what kind of incense they were smoking.

But here I am.

My moment of truth came when I attended the Resonate service one Sunday evening.

At the time, I was facing some significant health issues. I was physically, mentally and emotionally exhausted. I knew I was looking for some help – some inspiration – but I wasn't sure where it would come from.

During the service, I went up to the prayer station. I lit a candle and sat near the high altar. While the soulful music played, I observed the light through the stained glass windows. Suddenly, tears sprang to my eyes. The longer I sat, the more my feelings intensified. In a moment of clarity, and for the first time in a long time, I heard God talking to me. And I knew, in that instant, that everything was going to be okay.

When my husband, Bryant, came to pick me up, he could tell immediately that something had happened. "This was amazing," I told him. "You've got to come back with me."

Ever the skeptic, Bryant was weary of going to "church". After a few conversations, Bryant said: "Okay, let's give it a try."

Based on our checkered religious pasts, the two of us faced a huge barrier on our path back to God. Finding a route we could take together presented an even more challenge. But we came back, hand in hand, and took our first steps toward exploring this amazing community. And in the years since, that experience has only grown and intensified.

Resonate was our point of entry, but what we've found at Christ Church is a haven for our family. From the children's choir to the kitchen crew, from Catechumenate class to external events with the Welcome Committee, we've been able to combine heartfelt worship with both spiritual awakening and service to the parish.

Because we have received so many blessings here, we feel fortunate that we are able to give back to the church with our time, efforts and resources. We look forward to being members of this church community far into the future. We hope you'll be with us.

Sample Ministry Minutes

Summary Statements

Resource 2.39

John Doe – Week 1

Theme: teaching and beauty for all ages

“A thriving congregation like Christ Church has both beautiful corporate worship and spiritual understanding. I love the Catechumenate and SOWHAT classes which form both adults and youth respectively. We take theology and use it to form our lives. That is great work.”

Jane Doe – Week 2

Theme: spiritual nourishment (beauty & music emphasis)

“I love the connection to God and community I find at Christ Church. Our worship, music, preaching, conversation, and fellowship nourish my mind, heart, and soul. And we laugh! I am strengthened for learning and growth and service.”

Jason Doe – Week 3

Theme: family formation (children’s formation emphasis)

“Christ Church is an essential part of my family’s formation in faith. The preaching and teaching are second to none. My family is engaged in scripture, tradition, and contemporary thought. I’m grateful to have a place like this in which to raise my children.”

Joanne Doe – Week 4

Theme: conversion of life (Transformation)

“Each parishioner is respected at Christ Church and is invited into a process of the transformation of our lives. The invitation is not to conformity but to the renewal of our minds through study, worship, fellowship, and play. This can begin the day we walk in the door.”

Josie Doe – Week 5

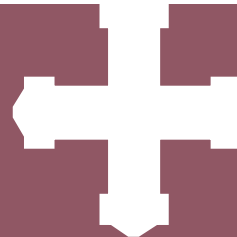
Theme: the value of community in tough times and easy times

“We valued a welcoming and inclusive environment, where we could become a part of a genuine community, and ultimately raise our family in a church we were proud to call home.”

Jeremiah Doe – Week 6

Theme: giving and receiving, a plug for the Martyn Hart Society

“I see the Holy Spirit in our community. People give of themselves and they receive from each other. The community cares about each other, receives from one another, and gives to one another. It is an active thing — a two-way street — not passive. Life in the community of this church is an action verb. There is movement in our giving and it flows.”



Josiah Doe – Week 7

Theme: faith in action — ministry to the poor

“The beauty of the church and its many ministries is a constant reminder to me of the many ways in which people come together to support, encourage, and challenge each other to live and grow in faith as a community.”

Joseph Doe – Week 8

Theme: ministry to the sick

“I had a difficult journey last year because I was diagnosed with breast cancer. I requested prayers from the Christ Church prayer chain. Thanks to prayers from my loving family, my Christ Church family, and many friends across the country, I have been comforted.”

Sample Stewardship Campaign Leadership FAQ's

Resource 2.40

1. Why did we produce the discernment booklet?


- a. The cost to produce and mail the discernment booklet was one dollar each. We felt it was a way to teach and lead on a difficult subject. Since the average pledge is \$1700 and we hope to increase it to \$3,000 over a few years, we felt it was a good investment. The reality of life is that even churches must spend money to raise funds. Rather than sending out many mailings and multiple bulletin inserts to communicate our needs and accomplishments, we felt that placing it in a booklet was wise, efficient and economical for the \$1.2 million we need to raise for mission and ministry in YEAR.
- b. We feel that other groups which do effective work to raise the funds they need, such as museums and social service agencies, do a good job of telling donors what they have accomplished, why they are a good investment and what impact they are having in their service group. Though we know the stewardship work we are doing is a spiritual endeavor, it also has logistical implications of which the Discernment Booklet is one.
- c. When making an investment through a pledge, which is on average \$1600 and which we hope will increase on average to \$3,000 over the next five years, we used the Discernment Booklet to help congregants to make a decision which is determined, prayed, informed and discerned. So far, more than half of the pledgers of our church have increased their pledge and we believe the booklet is having a profound impact on pledging.



2. What does this campaign cost the church?

- a. The booklet and four post cards cost \$1.50 per congregant and the kick-off brunch cost \$1.95 each to provide breakfast with a theme linked to the sermons. We hope the ending party on November 20th will cost approximately \$20 per person for a full dinner and entertainment and will be an opportunity to celebrate our life together and connect in meaningful and fun ways.
- b. The Canon Steward and his budget costs the church less than 2% of the annual money spent; but also provides pastoral, teaching, liturgical, strategic planning, conflict resolution, and congregational development resources.

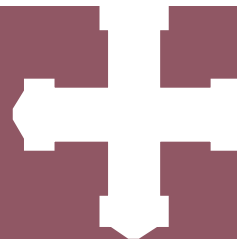
3. Why do I keep getting postcards in the mail (four of them over 8 weeks)?

- a. These cards are designed to help us to celebrate our life together. They highlight the speakers we enjoy each week, since so many families cannot make it to church every single week. The cards also tell us what is going on in the campaign, which is valuable for a family who cares for the future of our church and its ministry.

- 
4. Will I get a phone call about my pledge?
 - a. No, not if you make a pledge in the first six weeks of the campaign. But those who have not pledged two weeks before the ending celebration will get a phone call to encourage a pledge.
 5. I do not pledge. I prefer to place cash or checks in the offering plate. Is that ok?
 - a. Any gift to the church is gratefully received but the plate is generally there to receive pledge payments and spontaneous gifts from visitors who are here from out of town. As with any family, the budget is informed by planned income and is spent carefully. But without pledges there is not a way to plan strategically. We seek to lead with both prayerful discernment and administrative non-profit excellence.
 6. Who chose the Ministry Minute speakers?
 - a. The Church has a Commission on Stewardship under which a Committee on Major Gifts and a Committee on Planned Giving work hard to craft excellent programming and management. The Stewardship Commission developed a list of 45 possible speakers and reduced the list to the final eight from whom you are hearing.
 7. Why are we having kick-off and closing events? Would it not be better just to save the money and hope people notice the mailings and then make their pledge?
 - a. The opening event and the closing dinner and dance are designed as the liturgies, that are designed to bring people together. As we come together for the Eucharist to celebrate life and enjoy each other, and as we come together on Wednesday nights for formation and meals, so too we come together for these two stewardship events in order to celebrate the great accomplishment of raising the funds we need to do ministry together. These events are also a way to thank those whose hard work and gifts make our ministry possible.
 8. Why are we having a dinner and dance on November 20 to end the campaign? Usually, we just let the campaign drag out into Easter until the past pledges arrive.
 - a. The event is designed both to bring us together and to mark the end of the campaign season. It takes a family about 30 minutes to discuss family finances and to decide on a pledge. We are asking congregants to do that discernment about the amount of their pledge over eight weeks rather than 8 months. In the past, congregants have taken as much as eight months to decide on their pledge. We are asking the congregation to reduce that decision window and to limit discernment to eight weeks, so that the pledges are in before the final budget needs to be decided upon.

- 
- 
9. What is the budget of our church? How do we spend the money we raise and what does the Vestry do?
 - a. The church offers complete transparency regarding the budget and with an email or phone call, a budget will be sent to you. The vestry minutes are public documents and can be requested and some key points are highlighted each month for congregants.
 10. No one ever asks my opinion and I have some!
 - a. We welcome letters and notes. We welcome calls to Vestry Members and clergy with your opinions. We host conversations each fall in which your opinions are requested and openly heard by everyone. We want to know what you think. This is YOUR church!

Phone-A-Thon Script, Mid-Campaign Resource 2.41



Introductory Notes

Thank you for taking the time and making the effort to reach out to our church community through this phone-a-thon. What we know about financial development in churches is that relationships form the foundation of all giving. It is not a surprise that the number of people who pledge matches, almost exactly, the number of people who attend. People give because they have a real relationship with the church in a physical and human way, as well as a relationship with the people they consider friends within the church. And finally, they give out of an awareness and confidence in the mission and leadership.

Most calls will result in a message left, but this message is still very important. They will listen to it simply because it mentions the church and is a human voice. Please be clear that we are asking people who have yet to pledge, to please do so now.

What follows are scripts for the basic phone call, and then some bullets which might help as you face questions.

Thank you for making this time to make these calls. I cannot tell you how important these calls — and the hand-written notes we send in January — are to making this campaign a success. These two person-to-person contacts are simply essential to creating energy and maintaining connections. People give to people. You are those people.

Script

(NOTE: Before you dial their number, check to see if they have or have not yet pledged to the campaign. The answer to this vital question changes your introductory statement of thanks):

“Hello, my name is JOHN and I am calling to thank you....”

(CHOOSE ONE OF THESE TWO OPTIONS)

HAVE pledged

“...for having made your pledge to the mission of Christ Church.”

HAVE NOT yet pledged

“...for considering your pledge to the mission of Christ Church.”

“We are in the middle of the campaign and it is going very well. We hope to have all pledges in by *DATE*.”

“On *DATE*, we will celebrate the end of the pledge campaign with *EVENT*.”

“Thank you for sending in your pledge card or making your pledge online.”

Christ Church is a wonderful community of people doing great work in our city. Your pledge helps us to plan that ministry.

Tips

If you are interrupted with a person telling you that they have pledged (it is in the mail, etc.)

Thank them for their pledge, and for their time on the telephone, and invite them to the Campaign Celebration on DATE.

If you are told that they do not or will not pledge

Ask them if there is any concern they have which makes it difficult for them to make a pledge.

If they are upset about anything, tell them that you hear their concerns and will, with their permission, convey concerns to the clergy or to the appropriate person.

Never debate, never get defensive (even on behalf of the church or clergy).

If you are told they are unhappy with some aspect of life at the church

Listen, never interrupt, thank them for their willingness to tell you of their concerns, and ask if you may convey these concerns to the clergy. Never debate or object. Just listen and tell them they have been heard.

If you are told of a problem with a pledge or past gift

Thank them for telling you about the problem; apologize to them for any inconvenience and explain that you will be sure to tell the Rector that this was a problem so that it does not happen again. Then please make a note that gets to the Rector.

If you are told they cannot come to the celebration on DATE

Thank them for their pledge or for the consideration of one, tell them that they will be missed and that they can RSVP on line or by calling or emailing the church right up until the day before the event if they are able to change their mind or if their calendar changes.

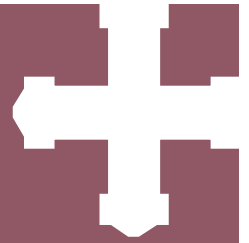
If there is a pastoral issue mentioned which you feel requires a member of the clergy to address

Listen to their story. Thank them for telling you about their situation. Ask if you may pass this information along to the clergy and ask if there is clergy in particular they would like to call them back about the situation they have conveyed. Explain that the information they have told you will be held in strict confidence and that only the clergy will be informed of their situation/need if, in fact, that is their desire. Please do not inquire into details unclear to you and please refrain from offering advice or logistical help. Simply thank them and tell them that you are able and willing to pass this along to clergy.

If you are asked about planned giving or major gifts

Please tell them that you will ask *STEWARDSHIP CHAIR* to follow up to answer their questions.

Phone-A-Thon Script, Late-Campaign Resource 2.42



Script

Verbal Call Script

(Note: As you make the calls, if you see we are missing email addresses or cell phone numbers, would you please ask the person with whom you are speaking to provide that for our records and use the call list to add that in clear printing to it in red so that we may update our records? Thank you)

- Hello, my name is *JOHN* and I am calling from CHRIST CHURCH. We are only 19 days away from the celebration of the stewardship pledge campaign on *DATE* at *PLACE*.
- We are reaching out to those who pledged last fall. Your pledge card for *YEAR* may be in the mail or on its way through an online pledge but just in case, I am calling to ask if you will confirm your pledge in the next few days before *DATE*, the last day of our stewardship campaign.
- Our hope is to reach our \$XXXX goal at our celebration, on *DATE* which means receiving all of the pledges by Wednesday so that we can end the campaign. We do not want to be pestering our congregation any longer than necessary.
- Would you please help us to reach our \$XXXX goal by making your pledge in the next 19 days so that we can celebrate the successful end of the campaign that night?
- I will send a follow up email just to provide you with a link to the online site for making this pledge, and I will also send a pledge card as an attachment.
- Any response you make by email can conform your new pledge and can be added to pledges as we seek to reach our goal next week.
- Please respond in the next few days so that we can celebrate on *DATE* with joy.
- Thank you for your investment in the mission of Christ Church. We are excited about this year's accomplishments and thrilled with the potential of next year's work.
- Please call me or return my email if you have any questions or if I can be of any further help in counting your pledge to our totals in the next seven days.

Email Follow-Up

(NOTE: Cut and paste email address from your list and then send a follow-up email before making next call. If you see no email address, write name on note card envelope to write a hand-written note before the next call.)

(After a live, connected conversation — ie: they answered their phone and you spoke to them)

Subject: We need your help in the next few days

It was very kind of you to speak with me today about this final week of pledging to the Christ Church stewardship campaign. Enclosed is a link to the pledge web site (<http://christchurch.org/Pledge>) and I have also attached the PDF of a pledge card in case you would simply like to print out a new pledge card for your use. Any response to this email with an amount you would like to pledge for *YEAR* will help us to reach our goal on *DATE*.

Warmly and with thanks for your help,

Your name

(please attach a PDF of the pledge card to the email)

—or—

(In the event you left a message)

Subject: We need your help in the next few days

I am sorry to miss you today. I left a message about this final week of pledging to the Saint John's Cathedral stewardship campaign. Enclosed is a link to the pledge web site (<http://christchurch.org/Pledge>) and I have also attached the PDF of a pledge card in case you would simply like to print out a new pledge card for your use. Any response to this email with an amount you would like to pledge for *YEAR* will help us to reach our goal on *DATE*.

Warmly and with thanks for your help,

Your name

(please attach a PDF of the pledge card to the email)



FEARLESS TIP: For other material on pledge campaign management, see *Fearless Church Fundraising*, Pages 132-147.

Stewardship Campaign Closure Recognition



There are a few things to consider as you plan your recognition plan for the parish annual pledge stewardship program:

1. The first “thank you” should come from the rector, vicar, or priest-in-charge. It should:
 - a. Be hand-written on attractive and inexpensive note card stock.
 - b. Be legible (if you have bad hand writing, then use a printer to do the body of each note in an informal script and write the salutation (“Dear.....:” and the concluding signature of first name) in blue, live ink.
 - c. be mailed within 30 days of the end of the campaign at the latest.
 - d. Include the amount pledged for the year.
 - e. Be kept short (two to three sentences)
2. The second communication should come from the treasurer and should:
 - a. List the terms of the gift and its amount (frequency of payments, etc.)
 - b. Note that payments will be acknowledged quarterly until the pledge is paid
 - c. A final tax acknowledgment will be sent in the first week of January
 - d. Note that the gift amount is strictly confidential between the treasurer and the rector, vicar, or priest-in-charge.
 - e. Typed on church stationery, 8.5 x 11 inches, with live blue ink signature, no personal note and stamped “confidential” by ink stamp (Kinko’s has them) or in laser on the letter text.
3. The acknowledgment of payments should be monthly or quarterly. Pledgers should never be unsure as to how they stand on their pledge payment unless they specifically request that no statement be provided regularly.
4. Late payments should be reminded gently by a short form note from the treasurer asking if there is anything the parish can do to assist the congregant in the payment of their pledge. It should never look like a bill or invoice.

Notes:

Notes:

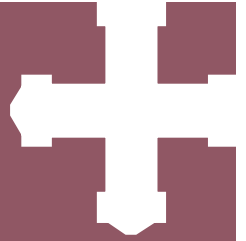
5. A tax acknowledgement should be sent from the treasurer to acknowledge all payments made prior to midnight December 31st. If checks arrive up to four days into the new year, most parishes accept the pledge as payment for that previous year's pledge.



FEARLESS TIP: For other material on campaign closure: see Fearless Church Fundraising, Pages 147-159.

Sample Year-End Giving Article

Resource 2.43



Year-End Giving Article

Some people find that at the end of the year, they would like to give a special gift to the mission of the church. For some it is a celebration of having ... well... lived another great year! For others there was a year-end bonus to share, and for still others it simply makes sense to give a little extra money away simply because they can — and enjoy doing so. And for some, using a planned giving tool such as a charitable remainder trust makes it possible to make a large gift while also benefiting from the tax and living advantages of various planned gift mechanisms.

The church gratefully receives year-end gifts including stock and payment beyond *YEAR* completed pledges. Some whose income is based on annual sales have been conservative about their *YEAR* pledge and were waiting to make a year-end gift when they had a better picture of their financial situation. We have had to significantly tighten the belts of the budget this year and it is our hope that \$200,000 in various additional gifts and special contributions will assist the mission and ministry of the church.

If you have money you would like to give to more fully fund the mission and ministry of the church at the year-end (before December 31, *YEAR*), or if you would like to honor a loved one, celebrate an event or give thanks for a blessing, please contact the Rector.

The Stewardship Liturgical Plan

Notes:

Use of Prayers and Prayers of the People

It is essential that churches actively talk about, and pray publically about the money they hope to raise, the mission they hope to achieve, and the people they hope to attract as new members. The church tends to be shy about these public discussions and these public prayers. It is essential that throughout the year, strategic insertions into liturgy, meetings, and publications focus clearly on the desire to raise money and people.

We suggest that a Rector write the following for each of the eight weeks of a campaign:

1. A bulletin insert telling people how the campaign is going. Do not keep the campaign a secret. Speak openly about it.
2. A collect to be inserted into the prayers of the people specifically asking God for assistance and encouragement in various aspects of the campaign. Speak to God, in front of the people, about raising money. Be bold.
3. A scripted announcement which tells people verbally about the campaign, highlights events, and thanks the ministry minute speaker.



FEARLESS TIP: For other material on pledge campaign planning, see *Fearless Church Fundraising*, Pages 84-104.



Icons as Teaching Tools

Icon: The Crucifixion Presence

Why we do all of this: to be present to people who are trying to swim against the tide of materialism and make the hard choice to make a substantial pledge of money or membership. Stewardship and membership growth praxis is a version of standing with people as they try to make this choice among the many the media are offering. The ministry of presence is essential and the image of Mary and John at the cross is a primary and valuable icon to that reality of ministry. If we can be fully present to our congregations as they do the hard work of discerning their pledge, and if we can be fully present to our communities as they become aware of and discern membership in our churches, then we will be supporting the praxis of financial development and membership growth with effective spirituality and theology. Jesus came to be with us.

Icon: Myrrh-Bearing Women

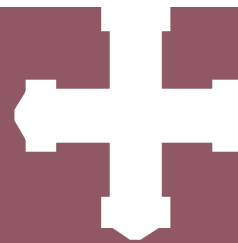
Why this icon to consider planned giving? This icon is often used to do all of the work and inspire theology around a planned giving because the women bring costly gifts to Jesus after death only to be told by the Angel that he is not here – he is risen – he is away – he is now the church. The iconographer has shown us where Jesus as all iconographers do – by pointing to Jesus with the rocks and the wings of the angel. Clearly the wings of the angel and the rocks indicate that Jesus is not here...he is off-screen – he is in the church as the Risen Lord. As so too, our gifts, after death through planned giving are our way of continuing to work for the kingdom of God after death and in the resurrection life.

Notes:



Icon: The Crucifixion Presence

Resource 2.44



The Johanne Crucifixion: 19th Century, Russian, Round tempera on wood with gold tooling

This icon depicts a Johannine crucifixion, complete with the three women and the Beloved Disciple at the Cross. It is here that Jesus forms the church. The Russian icon shows a city, representing the Kingdom and mission of God, with a sky of tooled gold representing God's glory surrounding the mission – a theme of John's gospel. This icon is a valuable image for use in stewardship because it reminds the meditator of two essential things needed in teaching financial development in our churches:

We, like Mary and John, “make presence” with the church and its donors as they suffer confusion, greed and longing for a new heaven and a new earth. We stand there with a people suffering from too much money and too many options. The suffering of choice when the church is so valuable, and the media so well-funded, catches donors as the weak end of the triangle. We stand with the people as they work out the role of money in their lives.

We remember that the money we seek to raise must be money raised for an arresting, vital, powerful and meaningful case-for-support. The Glory of God is no small case-for-support. Too often, money is raised for dull-grey and not tooled -gold. Our work must be to raise money for mission worthy of being funded. We, as bodies, are what we eat. Our orientation shifts. We, as souls, are what we adore. Either we adore ourselves with our money or we adore Jesus, as the living church. Helping people to give is part of this adoration-shift.

John 19:25-30

Meanwhile, standing near the cross of Jesus were his mother, and his mother's sister, Mary the wife of Clopas, and Mary Magdalene. ²⁶ When Jesus saw his mother and the disciple whom he loved standing beside her, he said to his mother, ‘Woman, here is your son.’ ²⁷ Then he said to the disciple, ‘Here is your mother.’ And from that hour the disciple took her into his own home.

²⁸ After this, when Jesus knew that all was now finished, he said (in order to fulfill the scripture), ‘I am thirsty.’

²⁹ A jar full of sour wine was standing there. So they put a sponge full of the wine on a branch of hyssop and held it to his mouth. ³⁰ When Jesus had received the wine, he said, ‘It is finished.’ Then he bowed his head and gave up his spirit.

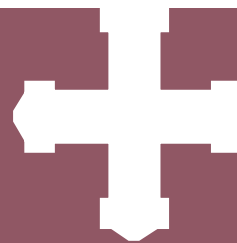
Prayer

Father of all mercy, be present to us and we stand, present to the church, Christ's wounded body, and let your glory shine as we work to raise money and care for donors. Amen.



Icon: Myrrh-Bearing Women

Resource 2.45



The Myrrh Bearing Women, egg tempera on wood, 2011. A Planned Giving Icon

This icon was written to honor those who worked to help in New Orleans during the post-Katrina disaster. It is intentionally without gold-leaf because the scene traditionally takes place in the darkness of the Resurrection morning. We often use this icon to consider stewardship, and especially planned giving, because the women bring costly gifts to Jesus, only to be told by the angels that he is not there. He is Risen! In other words, the gifts they brought to Christ's body now need to be brought to the new Body of Christ – his church – over in the towns and villages where people dwell – not in this tomb.

Notice that the energy and movement of the icon, its mountains and the teal wings of the angel, are all leaning off to the left. That is because, in iconography, the energy of an icon always surrounds Jesus. So, if you look at an icon in which Jesus is present, such as the Anastasis Icon of the Resurrection (the other primary Easter Icon) you will see the mountains wrap over Jesus – to show where Jesus is and that Jesus is the center of the image. However, in the Myrrh Bearing Women Icon, the wings and mountains point up and off to the left, to indicate that Jesus is away – that the body of Christ is now the church, and it is to the church that these valuable post-death gifts are to be brought. The spices and Myrrh (which was, in the first century, equal in value to gold by weight) were costly and would represent a year's salary to a wealthy person at that time or a life-time gift of an average person of the first century.

Matthew 28:1-10

After the sabbath, as the first day of the week was dawning, Mary Magdalene and the other Mary went to see the tomb. ² And suddenly there was a great earthquake; for an angel of the Lord, descending from heaven, came and rolled back the stone and sat on it. ³ His appearance was like lightning, and his clothing white as snow. ⁴ For fear of him the guards shook and became like dead men. ⁵ But the angel said to the women, "Do not be afraid; I know that you are looking for Jesus who was crucified. ⁶ He is not here; for he has been raised, as he said. Come, see the place where he lay. ⁷ Then go quickly and tell his disciples, 'He has been raised from the dead, and indeed he is going ahead of you to Galilee; there you will see him.' This is my message for you." ⁸ So they left the tomb quickly with fear and great joy, and ran to tell his disciples. ⁹ Suddenly Jesus met them and said, "Greetings!" And they came to him, took hold of his feet, and worshiped him. ¹⁰ Then Jesus said to them, "Do not be afraid; go and tell my brothers to go to Galilee; there they will see me."

Prayer

Father of all life, giver of all gifts and bringer of both life and death; give us an awareness of our brief time on this planet. Help us hold gently the humility of our mortality. When we fear death and the need to plan for it, be present to us in compassion. When we clutch our money and possessions, remind us, gentle Lord, that you give and that you take away. As we help others to give their biggest gift, through planned giving to the church, help us to be midwives to the great act of generosity made possible in a planned gift. May we be great ancestors to the future of the church by our planned giving. *Amen.*

Planned Giving

Comparison Summary of Life Income Gifts

Pooled Income Fund <i>Minimum contribution is \$2,500</i>	Charitable Gift Annuity <i>Minimum contribution is \$5,000</i>	Charitable Remainder Trust <i>Minimum contribution is \$100,000</i>
<p>(1) The donor receives an income tax deduction in the year of the gift.</p> <p>(2) Quarterly income payments fluctuate. The Fund is invested primarily for income; participants receive quarterly income payments that represent the Fund's earnings.</p> <p>(3) The entire income payment is taxed as ordinary income.</p> <p>(4) The donor may make additions to the Fund in increments of \$1,000 or more.</p> <p>(5) Donors are invited to designate a portion of the final gift to the Episcopal Church Foundation.</p> <p>(6) The ultimate gift must be designated for an Episcopal entity(ies).</p> <p>(7) Generally, the corpus passes to the charity.</p>	<p>(1) The donor receives an income tax deduction in the year of the gift.</p> <p>(2) Quarterly income payments are a fixed amount. If interest rates increase or decrease, payments remain the same. The payout rate is based on life expectancy(ies) and is guided by a set of tables created by American Council on Gift Annuities.</p> <p>(3) Depending on how the gift is funded, a portion of the income payment may be tax free.</p> <p>(4) The donor may not make additions to a charitable gift annuity. However, additions can be made to a deferred gift annuity until the requested payout date. An individual may purchase separate additional annuities.</p> <p>(5) The Foundation must be designated for at least 10% of the final gift. This is because the Foundation pledges its own unrestricted assets against the lifetime income payments.</p> <p>(6) The ultimate gift must be designated for an Episcopal entity(ies).</p> <p>(7) Depending on the duration of the income payments, the remainder gift available to the church may be in the 50%-60% range, historically.</p>	<p>(1) The donor receives an income tax deduction in the year of the gift.</p> <p>(2a) Unitrust Quarterly income payments fluctuate. The donor establishes the payout rate percentage when the trust is created. Quarterly income payments are based on the annual re-evaluation of the trust's corpus.</p> <p>(2b) Annuity Trust Quarterly payments are fixed based on the initial value.</p> <p>(3) The investments held in the trust account determine how the income payments are taxed.</p> <p>(4a) The donor may make additions to their Unitrust in increments of \$10,000 or more.</p> <p>(4b) The donor may not make additions to an Annuity Trust.</p> <p>(5) For trusts of \$500,000 or less, 5% of the remainder must be designated to ECF. For trusts more than \$500,000, only 3%. This offsets legal costs and helps allow ECF to offer this program.</p> <p>(6) The majority of the ultimate gift must be designated for an Episcopal entity(ies).</p> <p>(7) Depending on market conditions, the remainder gift for the church may be more or less than the initial investment.</p>

	Bequest by Will Give assets through will	Pooled Income Fund Give to fund, receive income payments for life	Charitable Gift Annuity Annuity issued in exchange for property (usually cash or securities)	Charitable Remainder Unitrust Irrevocable trust which pays an amount based on annual value of assets	Revocable Trust Trust which Donor can modify or terminate at later date	Life Estate Give real estate but retain right to use it for life	Life Insurance Gift Assignment of policy to church or church owns policy on donor's life	Charitable Lead Trust Trust pays church income, returns remainder to donor, or gives remainder to heirs after set number of years	Bargain Sale Sell asset to church at below-market price	Appreciated Property Give assets that have appreciated in value while living	Retirement Assets Give tax-deferred assets to a charity as a beneficiary at death
Income to donor	None	Income for life Rate based on market conditions	Income for life, may be deferred, Fixed rate based on donor's age at time of gift	Varying percentage based on investment conditions	All or portion of the net income	Retention of right to use property for income purposes	None	None	Purchased price of asset	None	None
Frequency of payment		Usually quarterly	Frequent	Frequent	Frequent						
Tax deduction	Possible reduction of estate and inheritance taxes	Initial possible income tax reduction. Capital gains tax and death tax reductions	Initial possible income tax reduction. Partially tax-exempt payments and possible reduction of death taxes	Initial income tax deduction. Possible reduction of estate and inheritance taxes. Avoid gains taxes if funded with appreciated securities.	Possible reduction of estate and inheritance taxes	Tax deduction based on equity in the property and donor's age. Possible death tax reductions	Possible tax deduction of premiums and cash value of policy	Trust usually passes to heirs at reduced gift and death tax rates	Partial income tax deduction for amount "lost" by the sale	Income tax deduction; capital gains tax may be avoided	
Special advantages	Can be designated	Satisfaction of making major gift while living	Satisfaction of making major gift while living	Satisfaction of making a major gift while living	Managed, professional oversight of investments; avoid probate	Satisfaction of making major gift while living	Ability to "leverage" gift	Trust dissolves after set period of time (10 to 20 years)	Satisfaction of making major gift while living	Versatile – most any form of property could qualify	Charity receives assets without paying deferred taxes

Planned Giving and Endowment Tools and Resources

Resource 2.46

Webinars

Recorded ECF webinars to empower your leadership:



<http://www.ecfvp.org/webinars/>

“Basics of Planned Giving for Congregational Leaders” (March 2015)



<http://www.ecfvp.org/webinars/basics-of-planned-giving-2/>

“Making a Planned Gift to benefit your Congregation” (Donor webinar-June 2013):



<http://www.ecfvp.org/webinars/making-a-planned-gift-to-benefit-your-congregation/>

“Successful Legacy Societies” (various): <http://www.ecfvp.org/webinars/legacy-societies-and-your-planned-giving-ministry-/>

(June 2015)



<http://www.ecfvp.org/webinars/legacy-societies-and-your-planned-giving-ministry/>

“Creating & Managing Your Endowment” (October 2014)



<http://www.ecfvp.org/webinars/basics-of-endowments-4/>

Comprehensive Resources/Manuals/Booklets & Brochures

Planned Giving on Demand: Planned Giving on Demand can be ordered through Forward Movement or by calling 800-543-1813.

Funding Future Ministry: (on this site you will find materials on this manual for PG as well several web resources):



<http://www.episcopalfoundation.org/programs/ecf-publications/funding-future-ministry>

ECF PG Booklets & Brochures (You can purchase them or download them for free or use their text for as “starter” for you own brochures):



<http://www.episcopalfoundation.org/programs/planned-giving/planned-giving-brochures>

Ministry of Planned Giving (the most general brochure and one you could use as the beginning text for a parish or diocese):



http://www.episcopalfoundation.org/uploads/pages/files/Planned_Giving_Brochure.pdf

Planning for the End of Life (fantastic resources for introducing PG and End of life planning; use part or all in adult forums):



http://www.episcopalfoundation.org/uploads/pages/files/End_Of_Life_Booklet.pdf

ECF sponsored PG site which your parishioners and leaders can use (includes descriptions of planned gifts, the ability to run simplified Life Income Gift illustrations and much more):



www.episcopalgifts.org



FEARLESS TIP: For other material on planned giving, see *Fearless Church Fundraising*, Pages 179-182.

Planned Giving Contact Person

Job Description

Resource 2.47

Time Requirement

(2 hours or more per month and 12 hours in month of annual recognition/welcome event)

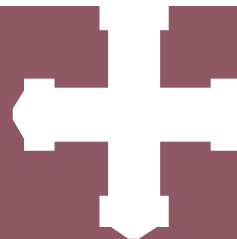
Recruitment

The recruitment of a person to lead Planned Giving in a congregation rests more heavily on the tenure and esteem held in the community and less on the development skills of the volunteer. The best person to do this job is someone well-respected for their integrity, discretion, hard work, follow-through and confidentiality. This should be a person who has or soon will a planned gift set aside in estate planning for their church. This work does not need a committee in a small church but might benefit from one in a larger congregation. The Congregational Planned Giving Contact Person should be invited to meet with the Rector or Priest-in-charge semi-annually and with the vestry or Bishop's Committee in the same frequency or quarterly in a larger congregation for mutual reporting and accountability. Tasks include:

1. Setting out brochures (additional copies available for free from Dio house) and being the go-to person for those seeking the more detailed brochure (additional copies available for free from Dio house) (most churches have the two large and small blue and white brochure sets for planned giving.)
2. Planning and managing Planned Giving Sunday (2nd Sunday in Lent.)
3. Placing occasional announcements in bulletins, on web sites and newsletters reminding people to make a planned gift.
4. Assuring web information availability about how to make a planned gift to the church.
5. Meeting with the vestry or bishop's committee to champion attention to planned giving.
6. Planning one planned giving donor event per year (perhaps on Planned Giving Sunday) to recognize donors or those who have remembered the church in their estate plan or to welcome new or perspective members.
7. Ensuring the production of an updated list of those who have remembered the church in their estate plan (verbal communication of that intention or accomplishment qualifies) and posting it in some area in a frame (able to be removed, the list updated, replaced and re-hung when a new donor presents themselves.)
8. Measurable Objectives: Partnering with the clergy to help them remain accountable to goals of a certain number of visits per year in which the invitation is made for new members to remember the church in their estate plans. (I.e: major gift/planned giving recruitment.)

Sample Planned Giving Welcome Letter

Resource 2.48



New members of the planned giving society (final major gift)

(Sent with the large-format planned giving “Stewards of God’s Bounty” magazine from The Episcopal Church Foundation, purchased through Forward Movement, for their use with their financial planner.)

Dear _____:

Thank you for your generous willingness to remember the _____ in your estate plans. _____ church’s ministry is a good investment of your philanthropy and we are mindful of the great responsibility of using this gift for the work Christ would have us do in the future.

Many have gone before us as ancestors to what we now enjoy as a church and what now serves the city of Denver in so many ways and for so many communities of human need. Those who went before us remembered the cathedral in their estates; and so now, as we do the same thing, we are providing for future ministries among future generations with our planned gifts.

As you make decisions about everything from living wills to planned giving financial tools, we are able and willing to assist in any way we can. Your financial and legal advisors will advise you as to what best suits your needs and your philanthropic interests, however I have enclosed a brochure called “Stewards of God’s Bounty” so that you have ready access to a summary of various tools and issues in making this planned gift.

Please do be most welcome to attend the annual (name) Society luncheon on June 14th after the 10:00 service in the gardens and in (place). And please do not hesitate to contact me if there is anything I can do to assist you in this process of discernment and this act of great generosity.

Warmly and with gratitude,

Ruthie Cohen
Stewardship Chair

Sample Letter to Planned Giving Society / Save the Date for Annual Event

Resource 2.49

Dear *JOHN* and *JANE*,

You are a member of the Planned Giving Society of our parish– the group of generous souls in our cathedral whose decision to remember the church in their estate plans helps make the future of the cathedral's ministry possible. Thank you for your willingness to be a part of this work of future-making. You have chosen to be a great ancestor to the future of the cathedral's ministry.

Those who remembered the parish in their estate plans in the last 150 years made what we have now possible and so we will take their torch and run our race into the future of this amazing parish community. Even now, we are making plans to enlarge the facility – Dagwell can only hold one sixth of our active congregation for dinner together – we would like to change that and even plan for a congregation four times its current size! Thank goodness the congregation at the turn of the century could imagine needing a nave as large as ours is now, but we want to be together outside the nave from time to time!

Please set aside the mid-day of June 14 (the Sunday before Father's Day) as a time in which we can thank you. Please come to a special, simple lunch at which we will discuss the future of the parish in a fun and creative way – the future you are in-part funding. In April you will get an invitation to which to respond by both mail and email. Until then, if there is anything I can do to assist you in making plans for this estate gift (if you have yet to make those plans) I would be happy to assist you by connecting you to a financial planner or by discussing how funds left to the cathedral are used. If you have documentation on living wills or funeral plans which help clergy to assist you and your family in case of an emergency, please pass them to my attention those and any other documents you would like us to have and we will keep them filed and confidential. A living will saves much needless suffering and trauma in a difficult time and is a great gift to your family.

An estate plan for some of us may be just a few thousand dollars – perhaps a percentage of an estate left behind at death - while for others there is more to leave behind. Regardless of the size of your estate gift (or one you are planning to establish) please know of our gratitude for this final gift and for the courage it takes to plan and discuss end of life issues in a society that so avoids the conversation.

Warmly, and looking forward to a wonderful time on June 14th some time before noon in Dagwell Hall after the 10:00 service, I look forward to seeing you and helping you in any way I can,

Ruthie Cohen
Stewardship Chair

Planned Giving: Ways to Leave a Gift

Resource 2.50

The largest financial gift any of us is likely to give in our lifetime is one we plan for the end of our lifetime. We are often hesitant to make planned gifts because we are hesitant to acknowledge our one mortality and the inevitability of our having to leave this life and move on to the next one. And yet we all know of a saint in our parish who has left a gift which has provided for our life together. We are grateful to them for making that planned gift. We each have that same power to make a planned gift.

By making plans for our final gifts now, we make clear to our surviving family and friends what we found important. The gift you plan may be small as \$5,000 from a mobile home plot deposit or an old savings account. Or it could be as large as the value of a home, insurance policy or other asset.

What is a planned gift?

These are gifts made out of one's estate at death or out of other assets, such as those held for retirement. There are two basic types of planned gifts: outright and deferred. Outright (or current) gifts such as a transfer of cash, stock, or other asset as part of an estate plan, or creation of a Life Income Gift which will provide income for life, or a set number of years to a designated individual, then ultimately be distributed to a charity, in exchange for a current gift. Most planned gifts are deferred gifts such as a bequest in a will or a beneficiary designation in an insurance policy or tax-deferred account.

What is a bequest?

- a provision made in one's will or Trust, through which the parish receives cash or other assets at the time of the giver's death.

What is a charitable gift annuity?

- a legal agreement between the giver and a charity, such as the Episcopal Church Foundation or your diocese, through which the giver exchanges cash, stocks or other assets for an agreed-upon income for life.

What is a charitable remainder trust?

- used to transfer assets to a trust which then goes to the parish after the last beneficiary while providing the giver a fixed or variable income for life or a set number of years.

What is a life estate contract?

- transfer of real property to a parish while reserving rights for you or others to live on the property for life. (Charitable deductions are limited to properties that are either personal homes or farms.)

What is a charitable lead trust?

- transfers assets to a trust, the income of which goes to the parish for a period of years while the assets revert to the donor or heir at the termination of that period.

Bishops' Suites Discussions:

Day Two

Resource 2.51

“Teaching Annual Giving Campaign excellence in our diocese as volunteer consultants”



Discussion: Planning and Roll-Out

Discuss and develop plans for rolling out a consulting and teaching program in your diocese that improves annual pledge campaign planning, management and effective metrics evaluation.

1. How could your diocese plan, market and host stewardship and membership growth seminars either as a diocese or regionally within your diocese in order to annually provide materials teaching and encouragement in this work?
2. Do you know who, within your diocese, are the clergy and lay professionals who have expertise in financial development, teaching adults, training, consulting and the art of hosting meaningful conversation? Can you develop a leadership roster of these people and mobilize them to assist support services in your diocese regarding financial development and membership growth? Furthermore, would it be possible, one day, to have a church—wide speakers—bureau and consultants roster from which all churches and dioceses may draw talent for teaching Project Resource materials?
3. How will you roll—out a Project Resource training team to train your churches in effective financial development and membership growth?
4. How would you use the icons, Bible passages and prayers on the icon cards to spiritually and scripturally ground the conversations you have in churches regarding stewardship and membership growth as resident, free consultants?

NOTE: Be prepared to do a report—out in the morning at 8:00 am. Have a person from your diocesan team designated as ready to make your report (10 minutes) Not all dioceses will be called upon but all will be asked to be ready to be called upon to tell the larger plenary what you discussed and what plans you made for the roll—out of Project Resource in your diocese.

9:00pm Silence, rest, and ready for third day.



Notes:





Notes:

