

The
Episcopal Diocese of Newark

Equipping congregations... Empowering people... Engaging the world ...with the hope and justice of Jesus.



Stewardship & Change

Resource Booklet

All Saints' Church

Leonia, NJ

September 27, 2014

**Diocese of Newark
Stewardship & Change
All Saints' Church, Leonia
September 27, 2014**

Resource Booklet Contents

- Agenda
- Bible Study
- Becoming Agents of Change—Exercises
- Postcard
- Additional Resources
 - The Bible and Stewardship*
 - Planning for a Year-Round Stewardship Development Program*
 - Year-Round Stewardship Planning Matrix
 - Six Best Practices – Stewardship Strategy Assessment
 - Stewardship University™: Annotated Resource List **
 - Planned Giving as Part of Ongoing Stewardship
 - Assessing Congregational Vitality ***

* From *A Manual for Stewardship Development Programs in the Congregation*, edited by Thomas R. Gossen of The Episcopal Network for Stewardship

** Courtesy of the Rev. Timothy Dombek, Canon for Stewardship, Diocese of Arizona

*** Courtesy of Mary MacGregor, Director of Evangelism & Congregational Development, Diocese of Texas

**Diocese of Newark
Stewardship & Change
All Saints' Church, Leonia
September 27, 2014**

Agenda

- | | |
|----------|---|
| 9:00 am | Welcome; Opening Prayer; Overview |
| 9:10 am | Bible Study |
| 9:30 am | Becoming Agents of Change in a Changing World |
| 11:00 am | Break |
| 11:15 am | Stewardship Story |
| 11:20 am | Year-Round Stewardship & Narrative Budgets |
| 11:45 am | Generational Stewardship |
| 12:15 pm | What's Worked? What Are Your Challenges? |
| 12:40 pm | Postcards |
| 12:45 pm | Stewardship Resources |
| 12:55 pm | Evaluation and Closing Prayer |
| 1:00 pm | Conclusion |

Bible Study

2 Corinthians 8:1-7

Encouragement to Be Generous

We want you to know, brothers and sisters, about the grace of God that has been granted to the churches of Macedonia; for during a severe ordeal of affliction, their abundant joy and their extreme poverty have overflowed in a wealth of generosity on their part. For, as I can testify, they voluntarily gave according to their means, and even beyond their means, begging us earnestly for the privilege of sharing in this ministry to the saints—and this, not merely as we expected; they gave themselves first to the Lord and, by the will of God, to us, so that we might urge Titus that, as he had already made a beginning, so he should also complete this generous undertaking among you. Now as you excel in everything—in faith, in speech, in knowledge, in utmost eagerness, and in our love for you—so we want you to excel also in this generous undertaking.

Questions for Reflection and Discussion:

In this passage, Paul is first connecting first us with the Lord, and secondly he is connecting money with mission.

Does your congregation need to change the way it teaches about money?

What conversations can you imagine that would relate faith and money in a way most helpful to the stewardship mission in your congregation?

GIVE SOME CONTEXT TO THE SITUATION – GIVE A LEAD-IN to frame it for the rest of the day

**Diocese of Newark
Stewardship & Change
All Saints' Church, Leonia
September 27, 2014**

**Becoming Agents of Change in a Changing World
Presentation by Mary MacGregor
Exercises**

Exercise #1

- Objective: Reflect on our personal history with change.
- Format: Table discussion.
- Exercise: How willing are you to change? Think about changes you've experienced in your professional and personal life. Examples include a new program or process, a change in your business' direction, a move, starting a family, a job change, opening or closing a business, etc. When has change been good/bad? Why? What role did you play in that change? What could/should you have done differently?

Exercise #2

- Objective: Become comfortable sharing our stewardship stories.
- Format: Find a partner at your table.
- Exercise: In 2-3 minutes, each person briefly shares a personal stewardship story with the partner. Switch partners and repeat the exercise. Regroup as a table. Any easier the second time? How can we become more comfortable sharing our stories?

Exercise #3

- Objective: Apply what you've learned.
- Format: Table discussion.
- Exercise: Where is your parish now in the "phases of change"? Write down on a piece of paper. One person at each table volunteers to share where they are and why. Table spends 5 minutes brainstorming on potential next steps. A second person whose congregation is at a different phase shares their situation. Repeat brainstorm.

**Diocese of Newark
Stewardship & Change
All Saints' Church, Leonia
September 27, 2014**

Postcard to Yourself

Write your name and mailing address on the front of postcard.

On the back of postcard, write answers to each of the following questions:

1. What is one key item you learned today that will help you?
2. What change in your congregation do you want to see in the next two months?

It is impossible to think about Christian Stewardship in any faithful manner without engaging Holy Scripture. The following overview is not exhaustive. It presents some themes with texts identified that are available for study. These passages should be used not as proof texts but as triggers for the interior witness of the Spirit in our hearts.

God the Creator of all	Genesis 1:1-2:24
God's creation is good	Genesis 1:12, Genesis 1:18, Genesis 1:24
We are made in God's image	Genesis 1:27
God is a loving giver	John 3:16
God has given us dominion over creation	Genesis 1:28-31
God makes us Stewards of creation	Genesis 2:15
God accepts our best as offering	Genesis 4:1-4
God gives us children and work	Genesis 3:16-19

Attitude:

Matthew 7:12	I Corinthians 16:13-14	James 1:16-25
John 1:6-18	II Corinthians 4:17-18	James 1:26-27
John 14:1-14	Hebrews 10:24-25	I Peter 1:17-25
I Corinthians 13:1-3	Hebrews 13:16	I John 2:15-17
		II John 1:4-6

What Is Christian Giving?

Matthew 5:23-24	Luke 6:38	I Corinthians 13:3
		I Corinthians 16:2

What Does Jesus Say about Your Money?

Matthew 6:19-21	Matthew 25:14-30
-----------------	------------------

What Is the Kingdom of Heaven Like?

Matthew 13:24-30	Luke 11:5-18	Luke 14:15-24
Matthew 13:44-46	Luke 12:42-48	Luke 16:13
Matthew 5:14-46	Luke 13:6-9	Luke 19:12-27

Danger Signs:

Malachi 3:8-9	Luke 12:10	I Corinthians 1:18-24
Malachi 4:1	Luke 21:34-36	I Corinthians 3:18-20
Luke 3:9	John 3:32-36	Titus 1:13-14
Luke 11:23	Acts 8:20-21	Hebrews 10:29-31
Luke 11:37-54	Romans 1:18-27	Ephesians 4:17-24
Luke 12:8-9	Romans 2:17-34	

Tithing:

Genesis 28:22	Deuteronomy 14:22	Tobit 4:8
Leviticus 27:30-32	Malachi 3:10	Hebrews 7:4

The Bible And Stewardship

A Brief Overview

Why Give?

Proverbs 3:10	II Corinthians 8:12-15	Hebrews 13:16
Luke 6:37-38	Ephesians 4:32	James 2:14-17
I Corinthians 4:8	I Timothy 4:8-10	Jude 1:3-4
II Corinthians 9:6-7	Hebrews 10:19-25	

What to Do?

I Samuel 4:9	II Corinthians 9:6-7	II Thessalonians 2:11-13
Matthew 5:23-24	Philippians 2:13	I Peter 4:10
Romans 12:2	I Thessalonians 5:19-22	I John 3:21-24

Why Are You Anxious?

Matthew 6:25-34	Hebrews 12:5-13	I Peter 3:13
-----------------	-----------------	--------------

Why Should There Be Dissension?

Luke 12:49-53	I Corinthians 11:17-22	Hebrews 10:24-25
---------------	------------------------	------------------

Why Tell Anyone My Intention?

Matthew 10:32-33	Romans 2:15-16	II Corinthians 1:12
Luke 12:1-3	Romans 9:1	II Corinthians 12:5
Luke 12:8-9	Romans 14:11-12	Philippians 4:5
Acts 20:25	I Corinthians 1:10	I John 4:1-3
		I John 4:14-16

The Wise, Mature Christian:

Proverbs 16:16	Matthew 7:24	Romans 12:9-16
Matthew 5:3	Luke 11:4-5	II Timothy 3:14
Matthew 5:10-16	Romans 8:9	I John 5:1-5

How Is Your Faith?

Matthew 6:31-32	Acts 15:10-11	Galatians 2:15-16
Matthew 11:25	Acts 16:31	Ephesians 6:13-18
Matthew 17:19-20	Acts 26:18	Colossians 2:6-8
Mark 9:23	Romans 1:6-17	I Timothy 1:18-20
John 6:40	Romans 5:1-5	I Timothy 6:11-14
John 20:3	II Corinthians 16:13-24	Hebrews 11
Acts 6:5	II Corinthians 13:5-9	I John 5:1-5

God Rewards the Giver:

Proverbs 3:9-10	Luke 6:38	II Corinthians 9:10
Proverbs 16:20	Luke 11:11-13	I Thessalonians 5:23-24
Malachi 3:10	Luke 12:8-9	II Thessalonians 3:3-5
Matthew 25:14-30	Acts 20:35	

Why Give Weekly?

I Corinthians 4:1-2	Luke 10:37-42	II Thessalonians 1:11
I Corinthians 16:2	Luke 15:19	I Timothy 1:15-16

Who Is a Good Steward?

Luke 10:38-42
Ephesians 4:1
Hebrews 12:5-6

Ephesians 4:17-18
Colossians 1:9-12

I Thessalonians 2:12
I Timothy 4:8

Why Should the Visitor Turn Down an Unworthy Gift?

Luke 15:19
Ephesians 4:1
Hebrews 12:5-6

Ephesians 4:17-18
Colossians 1:9-12

I Thessalonians 2:12
I Timothy 4:8

Resources Beyond Measure:

Luke 11:5-10

Luke 21:19

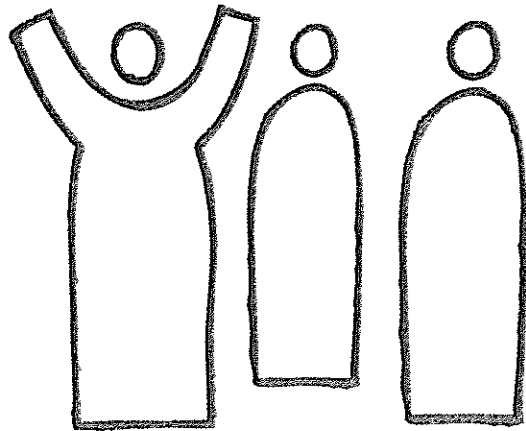
Parables about Stewardship:

Matthew 13:1-9
Matthew 13:44-45
Matthew 20:1-16
Matthew 21:33-41
Matthew 25:14-30

Luke 5:34-38
Luke 7:31-35
Luke 10:25-37
Luke 11:1-10
Luke 12:13-21

Luke 14:25-35
Luke 15:1-10
Luke 15:11-32
Luke 16:1-8

Then pray as our Lord teaches us to pray.
Matthew 6:5-13



Inductive Bible Study

A Key to Personal Transformation

Inductive Bible study allows the text of Holy Scripture and the reader to interact at a personal, heartfelt, individual level.

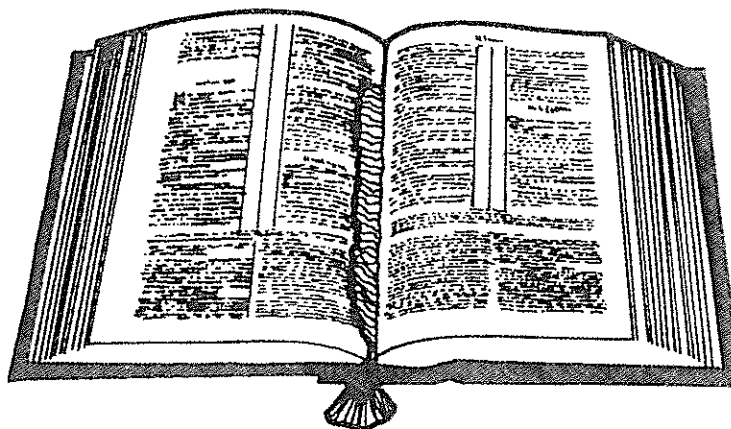
It is simple.

It requires:

- A text from Holy Scripture
- Questions that invite reflection
- Time for reflection
- An opportunity to share the reflection in a non-threatening environment
- An opportunity to pray, grow and determine implications for action

Following are four Inductive Bible studies. Other examples are provided in each of the Commitment Program Workbooks. This method can be applied to any text. These are best done in groups of 4-7 people.

When doing Inductive Bible Study in educational training events, it is suggested that you use a trained outside facilitator who will witness to their stewardship beliefs and practices.



Permission is granted to persons who have purchased this manual to reproduce the Inductive Bible Studies on pages 27-30 for use in their congregations.

BIBLE STUDY

II Corinthians 9:7

"Each of you must give as you have made up your own mind, not reluctantly or under compulsion, for God loves a cheerful giver." (NRSV)

Read the passage aloud together. After a time for quiet reflection, share your thoughts within your study group on these questions.

1. Most of us are reluctant to give because:

- A. (e.g. "I will not have enough")
- B.
- C.
- D.
- E.

These fears (or reasons for being reluctant) are real: Share with one another the realities of these fears in your life.

2. Most of us experience compulsion to give:

- A. (e.g. "I feel guilty when I see poverty")
- B.
- C.
- D.
- E.

These compulsions are real: Share with one another the realities of these compulsions in your life.

3. If the answer to my fears or reluctance to give is God's ever-loving care providing everything I need, what do I really believe about God's ever-loving care? How do I live this out in my life?

4. If freedom from giving under compulsion comes from knowing God's grace and the fact that God loves me no matter whether I give or not, what do I believe about God's love and forgiveness for me? How do I live this out in my life?

5. How might my life be different if I really could make up my own mind without reluctance or compulsion?

6. How would my giving be different if I could make up my own mind without reluctance or compulsion?

7. What am I going to do about my giving?

BIBLE STUDY

1 Corinthians 12:4-12

⁴Now there are varieties of gifts, but the same Spirit; ⁵and there are varieties of services, but the same Lord; ⁶and there are varieties of activities, but it is the same God who activates all of them in everyone. ⁷To each is given the manifestation of the Spirit for the common good. ⁸To one is given through the Spirit the utterance of wisdom, and to another the utterance of knowledge according to the same Spirit, ⁹to another faith by the same Spirit, to another gifts of healing by the one Spirit, ¹⁰to another the working of miracles, to another prophecy, to another the discernment of spirits, to another various kinds of tongues, to another the interpretation of tongues. ¹¹All these are activated by one and the same Spirit, who allots to each one individually just as the Spirit chooses. ¹²For just as the body is one and has many members, and all the members of the body, though many, are one body, so it is with Christ." (NRSV)

Listen to the passage read aloud. After a time for quiet reflection, share your thoughts on these questions.

1. Note the use of the word varieties in Verse 4. In what spheres of life do these varieties occur? *Share the thoughts.*
2. Note the repetition of the words same and one. Why do you think the author repeats these words so many times? *Share the thoughts.*
3. What does the author say about why the varieties of gifts, services, and activities are given? *Share the thoughts.*
4. How do these verses challenge your view of yourself and your daily life and relationships? *Share the thoughts.*
5. How is this text realized in your congregation? *Share the thoughts.*
6. Spend some time in silence and prayer allowing your mind to roam where it will with this text as a companion.
7. Identify one issue for either yourself or your congregation that you can share with your group in prayer, asking that others join you.
8. Pray together.

BIBLE STUDY

Colossians 3:12-17

¹²As God's chosen ones, holy and beloved, clothe yourselves with compassion, kindness, humility, meekness and patience. ¹³Bear with one another and, if anyone has a complaint against another, forgive each other; just as the Lord has forgiven you, so you also must forgive. ¹⁴Above all, clothe yourselves with love, which binds everything together in perfect harmony. ¹⁵And let the peace of Christ rule in your hearts, to which indeed you were called in the one body. And be thankful. ¹⁶Let the word of Christ dwell in you richly; teach and admonish one another in all wisdom; and with gratitude in your hearts sing psalms, hymns, and spiritual songs to God. ¹⁷And whatever you do, in word or deed, do everything in the name of the Lord Jesus, giving thanks to God the Father through him. (NRSV)

Listen to the passage read aloud. After a time of quiet for reflection, share your thoughts on these questions:

1. List some of the things the receivers of the letter were to do.
 - a.
 - b.
 - c.
 - d.
 - e.
 - f.
 - g.

2. What was their motivation for these behaviors?

3. What would the church be like if all believers lived up to this model?

4. How can we as individuals support each other as we all respond to these exhortations?

5. Identify one action that you can take. Share it with the group and ask for their prayers.

BIBLE STUDY

Jeremiah 31:31-34

As you begin this exercise, explain that the group is asked to please listen (follow along) while the text is read and then, after a period of quiet reflection, be prepared to share what word, phrase or image in the text jumped out at you and some of the reasons you think it jumped out at you.

Someone reads aloud:

³¹"The days are surely coming, says the LORD, when I will make a new covenant with the house of Israel and the house of Judah. ³²It will not be like the covenant that I made with their ancestors when I took them by the hand to bring them out of the land of Egypt—a covenant that they broke, though I was their husband says the LORD. ³³But this is the covenant that I will make with the house of Israel after those days, says the LORD: I will put my law within them, and I will write it on their hearts; and I will be their God, and they shall be my people. ³⁴No longer shall they teach one another, or say to each other, "Know the LORD," for they shall all know me, from the least of them to the greatest, says the LORD; for I will forgive their iniquity, and remember their sin no more." (NRSV)

After some quiet time, go around the group asking each person to share what jumped out at them. Do this while thanking each for their response and with no comment from others in the group.

Announce that you will have a second person again read the same text. And then, after some quiet time, we will ask each member of the group to share what troubles you about the text. Do this while thanking each for their response and with no comment from others in the group.

Announce that you will now have a third person read the text. Then, after some quiet time, we will ask each member of the group to share "what do you intend to do about any insights you have gained in this reflection today?" Do this while thanking each for their response, but not forcing any to respond if they choose not to.

After this sharing, the facilitator is to pray for each person by name for empowerment, or ask each person in the group to take turns praying for empowerment for the person on his or her right.

Planning for a Year-Round Stewardship Development Program

Every congregation needs a stewardship program that fits its situation. The clergy and vestry should create a special Stewardship Ministry Team (or commission or committee) to design and carry it out.

The Stewardship Ministry Team does not work to produce a program to fund the budget. It develops stewardship teaching opportunities to support the Mission Statement. It presents the theology of stewardship to the congregation's leadership. It works for every member to understand stewardship as a faith response.

In trying to establish a point of beginning, determine if the congregation has a sense of its Mission as expressed in its Mission Statement (if one exists). If the Mission Statement is more than three or four years old, it may be time to begin to discover anew the congregation's sense of God's call.

The development of a current Vestry Stewardship Statement is also an excellent way of beginning to get the leaders to focus on their responsibility to lead and witness to their stewardship beliefs and practices to the entire congregation. Vestry Stewardship Statements can be affirmed by succeeding vestries for up to two years. A Vestry Stewardship Statement should be developed from scratch at least every three years. Often the development of a current Vestry Stewardship Statement results in new insights that affect the design of the Mission Statement.

In carrying out faith development, a Stewardship Ministry Team looks for chances to promote stewardship principles. They also take responsibility for capital funds development and planned giving, keeping both within the context of local diocesan mission and ministry priorities.

A planned giving committee as part of the commission is very important (see BCP, p. 445). The commission should invite people knowledgeable about planned giving to lead the congregation in study. The diocesan office of stewardship/development can often recommend a diverse group of good resource people.

The practice of good stewardship requires constant effort. A Stewardship Ministry Team should educate the congregation about stewardship throughout the year. This year-round approach is necessary for improving stewardship practices. The following pages identify a variety of ideas for activities for promoting year-round stewardship education.

The Rt. Rev. John H. MacNaughton, author of *More Blessed to Give*, and retired Bishop of The Episcopal Diocese of West Texas (San Antonio), identifies, beginning on page 104, several issues about the importance of year-round education for stewardship as follows:

“...without the support of a broader year-round emphasis, even the very best financial stewardship programs, while maintaining their theological/biblical appearance, will over the years degenerate into simple fund raising.... In its broadest terms, what is the heart of our stewardship before God? Is it not to know and to accept that God is the ultimate source of all that we possess...?”

Three Ways to Teach Stewardship Year-Round That Have Some Substance:

1. Divide the 12 month calendar into four natural stewardship teaching times.

a. *January*—Choose a Sunday as near to the first of the year as possible. Here is an ideal time to focus on the theme of the stewardship of time. How do we spend our time? How do we break up the time we are given responsibly between service to self, service to others, and service to God?

b. *May*—Choose a Sunday around Arbor day. The second stewardship emphasis naturally falls here on the theme of the stewardship of the earth (creation). When we plant a seed in the ground we demonstrate our sense of partnership with God. When we set out a garden, plant a tree or a bush, or sow a field of grain we experience an example of our dependence on the generosity of God expressed through the created order. Spring is an excellent time to be reminded of our responsibilities to protect the gift of all creation in order to pass it on to the future as undamaged as possible.

c. *September*—Choose a Sunday as near as possible to Labor Day. This is a natural occasion to focus on the theme of our stewardship of talent. Consider a theme in terms of the way that our work—our vocations, professions, and jobs—can be used in helping others, directly or indirectly.

d. *October to early November*—Normally the focus this time of the year is on stewardship of money. However, the financial aspect of our total stewardship no longer stands alone, but becomes a part of a larger concern, a concern that encompasses most, if not all, of our lives.

In addition to the sermon, all other aspects of the worship service, insofar as possible, should be geared to emphasize the Sunday theme. This includes the choice of hymns, anthems, the use of special prayers on the theme, and at least one bulletin announcement directed to the theme.

2. A second way to bring stewardship into the Church's program year-round is to undertake two Every Member Visitations each year. The fall visitation for financial pledges and the spring visitation for pledges of time and talent.
3. Another effective way to keep stewardship on the minds of the congregation year-round is to use the Sunday bulletin and monthly mailings to write about it. The key to this approach is to have breadth and diversity in the messages in order to emphasize that stewardship is what we do, all the time, with everything we have.

Options for Liturgical Stewardship

I. FALL: PENTECOST, ADVENT, CHRISTMAS, EPIPHANY BCP, 856 Stewardship Ministry: Freedom



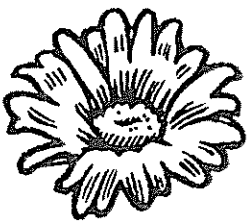
1. Theology: Out of the Bondage of Mammon
Scripture: *Luke 18:18-30*
 - freedom from money/materialism
 - freedom to give
2. Means: Percent of household resources for annual parish budget
3. Program: Fall commitment program—Every member visitation, dinner, etc.
4. Impact: Empowers the person and parish to spread God's Kingdom in the present

II. WINTER: LENT/HOLY WEEK BCP, 445 Stewardship Ministry: Foundation and Future



1. Theology: Temporal life; provision for future, rich toward God
Scripture: *Luke 12:13-20*
2. Means: Capital campaign, bequests, memorials, wills, estate planning, long-term care, funeral arrangements
3. Program: Getting our house in order—legal, wills, estates, burial, nursing homes, columbarium, endowment funds and programs
4. Impact: Stewardship of the person and the family. Allows conversation regarding intentional and inspirational endowment stewardship. Specific projects—benefits Kingdom of God now and for generations to come.

III. SPRING: EASTER, PENTECOST BCP, page 855 Stewardship Ministry: Ministry of Laity



1. Theology: Receiving gifts, discovering gifts, sharing gifts
Scripture: *1 Corinthians 12:4-7*
2. Means: Recruit and call members to share their gifts in specific ministries
3. Program: Pillar Sunday, ministry fair, recruitment, Sunday School parties, Vestry committees
4. Impact: Allows for time and talent stewardship; helps organize for the coming year; before-summer census, involves newly confirmed/received

Sample Twelve-Month Stewardship Planning Calendar

■ January (Epiphany)

Appoint Chair and Committee for year-round stewardship.
Develop Stewardship plan and calendar for the year.
Sermon (New Year's Resolution for Stewardship, Gifts for God).
Youth Epiphany Pageant. Follow up the next Sunday with discussion of Gifts for God in youth and adult classes.
Financial Planning Seminar.
Monthly newsletter article on finances/stewardship.



■ February (Lent)

Bible passage on stewardship, discussion at vestry meeting.
Lay person speaks on stewardship at all services on one Sunday.
Blood drive (the gift of life).
Youth Pancake Supper, 10% to world relief.
Lenten sermon on stewardship (Stewardship and Discipline). [Move to March, depending on the beginning date of Lent.]
Newsletter article on finances/stewardship.



■ March (Lent/Easter)

Stewardship Committee select Chair and Committee for annual financial commitment program.
Planned Giving Forum.
Adult Education program: Durable Powers of Attorney for Health Care and for Property and Financial Matters (stewardship of ourselves).
Age in Action—celebrate elders.
Special musical program, recognition of talents.
Newsletter article on finances/stewardship.



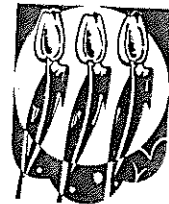
■ April (Easter)

Development of stewardship statement by vestry.
Celebrate Creation/Earth Day. Parishioners bring flowers to plant on church grounds.
Youth and adult classes discuss living in a safe and clean environment—Caring for God's World.
Sermon (Tithing and Taxes—What's the Difference?)
Spring Workday/Clean-up of church building and grounds.
Newsletter article on finances/stewardship.



■ May (Pentecost)

Lay person speaks on stewardship at all services on one Sunday.
Discussion of Vestry Stewardship Statement at adult education classes.
Ministry Fair with Every Member Canvass for gifts of time and talent.
Discussion in Church School classes on stewardship of the environment.
Stewardship Committee finalizes plans for fall financial commitment program.
Newsletter article on finances/stewardship.



■ June (Pentecost)

Mid-year Vestry Planning Retreat. Discussion of Bible passage on stewardship; review plans of Stewardship Committee for financial commitment program.
Youth Sunday—recognition for special work/attendance (stewardship of time and talent); recognition of teachers.



Blood drive (the gift of life).
Parish picnic. Pie/cake auction with money going to outreach project.
Newsletter article on finances/stewardship.



■ July (Pentecost)

Sermon (Stewardship of Time). Planning for work, play, prayer, and devotional reading.
Program on safety in activities (stewardship of our bodies).
Establish a group to work with Senior Gleaners.
Selection/development of materials for financial commitment program.
Newsletter articles on finances/stewardship.



■ August (Pentecost)

Selection of workers (callers) for financial commitment program.
Plan training program for captains and callers.
Art/Crafts/Hobby show by parishioners, including youth (sharing talents).
Adult Education classes—identify and discuss Bible passages where Jesus talks about money.
Newsletter article on finances/stewardship.



■ September (Pentecost)

Training program(s) for financial commitment program workers.
Vestry discussion of article/book/videos/tape on stewardship.
Wills and Estate Planning Workshop.
Adult Education discussion of theological basis for stewardship.
Church School classes discuss lesson on stewardship.
Newsletter article on finances/stewardship.



■ October (Pentecost)

Annual financial commitment program.
Dinner (or other event) to kick off financial commitment program.
Pledge Sunday(s).
Sermon on stewardship.
Lay person speaks on stewardship at all services on one (or more) Sunday(s).
Graphics on display showing current year income and expenses.
Newsletter article on finances/stewardship.



■ November (Pentecost)

Pledge Sunday(s) and continued calling (if program not completed).
Celebration of concluded commitment program.
Parish Thanksgiving dinner with thanks for gifts of creation.
Start a recycling program at church if one not already in existence.
Fall Workday/Clean-up of church buildings and grounds.
Newsletter article on finances/stewardship.



■ December (Advent/Christmas)

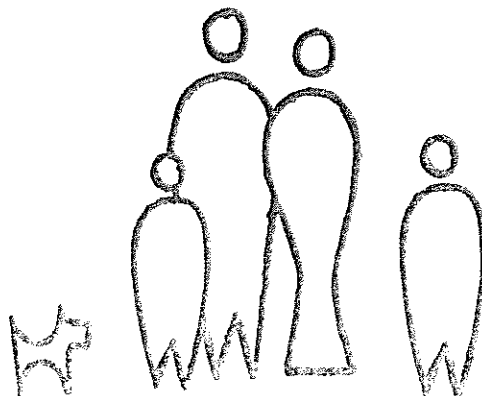
Final report on financial commitment program to Stewardship Committee and vestry.
Evaluation of annual financial commitment program.
Bible study in Adult Education and Church School classes on meaning of gifts and giving.
Program on Year-End Giving of appreciated assets, with tax consequences.
Sermon (How Can We be Stewards of the Greatest Christmas Gift of All?)
Newsletter article on finances/stewardship.

Thirty-Seven Suggestions For Year-Round Stewardship Activities

Listed below are examples of activities which can be used in a year-round stewardship program, designed to emphasize aspects of stewardship which are not directly related to the annual financial commitment program. Some are calendar or church season related, and are so noted.

- Sermon on a New Year's Resolution for Stewardship. (January)
- Epiphany Pageant put on by youth group, with a discussion of gifts for God in Youth and Adult Education classes on the following Sunday. (January)
- Photographer in congregation volunteers to take pictures of parish events during the year for display and for a picture collage or slide show at the annual meeting or the stewardship dinner.
- Blood drive.
- Financial Planning Seminar to assist families and individuals with budgeting.
- Wills and Estate Planning Seminar for general financial planning.
- Wills Workshop—instructions for making a will, including a Durable Power of Attorney for Health Care and a Durable General Power of Attorney for Property and Financial Matters.
- Youth Pancake Supper for Shrove Tuesday, with 10% going for world relief or, even better, with 50% going for mission outside the parish. (Shrove Tuesday)
- Celebrate a Creation/Earth Day and discuss living in a safe and clean environment. Parishioners bring flowers to plant on church grounds; plant a tree on the church grounds.
- Planned Giving Forum (if in April, title might be "Life's Other Certainty").
- Sermon (Tithing and Taxes—What's the Difference?). (April)
- Sermon (How Can We Be Stewards of the Greatest Christmas Gift of All?). (December)
- Spring and Fall Workdays in church and on grounds.
- Pentecost Every Member Canvass for gifts of time and talent. Develop a file from which to recruit as needed.
- Evangelism Workshop—how to tell our own Christian stories (stewardship of the Gospel).
- Pentecost Ministry Fair for recruiting volunteers (stewardship of gifts of the Holy Spirit).
- Recognition Sunday to celebrate ministries.
- Family Workshop—Work, Play, and Pray Together.
- Parish picnic and pie/cake auction with proceeds to go to an outreach project.
- Vacation Bible School themes on stewardship.

- Discussion in Youth and Adult Education classes on stewardship of time: planning for work, play, prayer, and devotional reading.
- Program on Stewardship of our bodies—safety in activities, health care plans, balance in daily living.
- Art/Craft/Hobby Show by parishioners, including youth—sharing talents.
- Used clothing collection to be distributed to the needy.
- Workshop on recycling, including how to start a compost pile. Plan effective recycling at church of office paper, bulletins, newspaper, cans, bottles, etc.
- Youth project: recycling to earn funds for a service project.
- Blessing of the Animals. (October 4, St. Francis Day)
- Parish Thanksgiving Dinner, with thanks for the gifts of creation. (November)
- Workshop: Advent Wreaths made for homes, complete with candles, liturgy, and prayers to be used by families (stewardship of Christ's coming—God's gift to the world). (November)
- Bible Study: theology of gifts and giving.
- Gifts for the homeless and for food closets.
- Educational Program on Year-end Giving of Appreciated Assets, with the tax consequences.
- Newsletter article: Include the Church on Your Christmas Gift List! (December)
- Lenten Calendars to remind us of sharing our wealth with the poor. (February, March)
- Youth outreach—assist elders with spring and fall clean-ups at their homes.
- Church birthday party for Pentecost.
- Potluck Supper with international theme—focus on the international community and world-wide church.



Diocese of Newark

Year-Round Stewardship Planning Matrix

December Advent/Christmas Theme: Preparing the Way

<u>Category</u>	<u>Activity</u>	<u>Resources</u>	<u>Ministries</u>	<u>Publicity</u>
Spirituality	Preparation and Worship	Worship teams	Adult Formation/ Children Youth	Bulletin, email
Focus Ministry	Children's Ministry - Stewardship of the Christ Child	Sunday School/ Youth	Children/Youth ministry	Bulletin, email
Finance	Year-End Gifts	Support of others	Stewardship	Bulletin, email
Environment	Paper Recycling Focus	Report on Recycling and its effect on environment	B & G	Bulletin, email
Outreach	CDC Awareness	CDC Annual Report	Exec. Director CDC & Staff	Bulletin, email
Gratitude	Vestry	Wardens- Explain what vestry does	Clergy	Bulletin, email
Event	Stewardship is . . .	TENS/ Diocese of Newark Info	Clergy & Stewardship	Bulletin, email

January Epiphany Theme: Light

<u>Category</u>	<u>Activity</u>	<u>Resources</u>	<u>Ministries</u>	<u>Publicity</u>
Spirituality	Spiritual Disciplines	Catechism	Worship	Bulletin, email
Ministry Focus	Annual Meeting/Celebration of Ministry	Annual Report	Clergy/Wardens	Bulletin, email
Finance	Pledging	What it supports and importance	Stewardship	Sunday Distribution
Environment	Hazardous Materials Inventory	Hazardous Waste List	B & G	Bulletin, email
Outreach	Food Pantry	Statistics on use, needs,	Outreach	Bulletin, email
Gratitude	Music Ministries	Commissioning, thanks at services	Clergy/Wardens	Bulletin, email
Event	Year-End Statements and Thank You Notes	Staff	Stewardship/ Finance	Bulletin, email

February Lent Theme: Sacramental Life

<u>Category</u>	<u>Activity</u>	<u>Resources</u>	<u>Ministries</u>	<u>Publicity</u>
Spirituality	Prayer and Fasting	Lenten Reflections	Worship	Bulletin, email
Ministry Focus	Pastoral Care - Stewardship of the Christ in the Least of These	Explain home visits	Pastoral Care	Bulletin, email
Finance	Physical Plant Use Plan	Layout of plant	B & G	Bulletin, email
Environment	Church Energy Use Assessment	PSE & G	B & G	Bulletin, email
Outreach	Shelter	Statistics on use, needs,	CDC	Bulletin, email
Gratitude	Pastoral Care Ministries	Commissioning, thanks at services	Clergy/Wardens	Bulletin, email
Event	Planned giving	Diocesan Information	Stewardship	Bulletin, email

March Lent/Easter Theme: Discipline

<u>Category</u>	<u>Activity</u>	<u>Resources</u>	<u>Ministries</u>	<u>Publicity</u>
Spirituality	Penitence/Realizing the Gift	Lenten Reflections	Worship	Bulletin, email
Ministry Focus	Outreach - Stewardship of the Needs of the World	Information on Outreach involvement	CDC	Bulletin, email
Finance	Conduct Annual Audit	Diocesan Information	Treasurer/Finance	Bulletin, email
Environment	B & G Property evaluation	Previous Evaluation list	B & G	Bulletin, email
Outreach	NextStep Workshop Development	CDC Staff	CDC	Bulletin, email
Gratitude	Parish Life and Welcome	List of all events	Clergy/Wardens	Bulletin, email
Event	Mardi Gras	Parish	Parish Life	Bulletin, email

Year-Round Stewardship Planning Matrix -

CATEGORIES

Spirituality: A focus on the stewardship and cultivation of our spiritual life communicates the deep connection between faithful stewardship and a healthy spiritual life. Stewardship is a spiritual issue; and keeping Sabbath is a key element in understanding God's abundance. This category offers ways to deepen the spiritual lives of individuals and the congregation, building on the theme of the month. Some examples are a class on spiritual disciplines or information about praying the labyrinth.

Ministry Focus: The mission of a congregation is largely carried out through its ministries. The ministry spotlighted gives an opportunity to teach stewardship related to that ministry. Focusing on a different ministry each month is a way of raising awareness about it to attract new participants (the time and talent part of stewardship). Ways to do this include commissioning ministry members during a church service, highlighting a different ministry in the church newsletter each edition, or inviting the ministry head to say a few words about the ministry during the announcements segment of worship. This also provides a wonderful opportunity for the parish to be publicly thanked for their financial support of the Spotlight Ministry.

Finance: This category offers a particular opportunity for an appeal, focus on fiscal responsibility, or financial ministry offering. Some of these activities can be used to communicate the congregational leadership's good stewardship of the congregation's material resources and the physical plant. Activities in the financial component should not be limited to congregational finances; there also are many ways families can be intentional about how they manage their money including what they are saving and what percentage of their income they are giving away.

Environment: A steward is a person to whom something is entrusted, and how we care for the environment that God has entrusted to us is a mark of our faithfulness. This category can include caring for the environment in our communities, in our homes, and in our churches. Activities that show care for the environment are especially attractive to children and families. This category is an imperative element of any stewardship formation, especially with those parishioners born after 1960. Asking for a pledge from many young adults while the church is using Styrofoam cups is often offensive to them because they see us not practicing what we preach. A few examples for this component include Reduce/Reuse/Recycle programs, Earth Sunday Celebrations, Stray Pet Programs, and a St. Francis' Day Blessing of the Animals. Simply put, our responsible Environmental/Creation Stewardship conveys loving your neighbor as yourself and loving God with all that we are. Remember, the earth is the Lord's and everything in it (*Ps. 24.1*).

Outreach: In outreach we take our stewardship to the streets of our communities. This category gives us an opportunity to live out our Stewardship teaching in the flesh. The idea is to have a missional focus on those outside the parish who are in need. The majority of these should be hands on ministries and not merely "check-writing" ministries. These activities help people connect their pledge to ministry; in addition, communicating and celebrating the stories of meeting the needs of people are important motivators for personal stewardship decisions. It is where the Gospel rubber hits the road! The members involved in actually reaching out will have the most powerful stories of transformation. Their public sharing of these stories are great opportunities for the whole congregation to give thanks (and be thanked by the leadership) for their good stewardship in support of ministries like these!

Year-Round Stewardship Planning Matrix -

Gratitude: This category simply focuses on a Ministry group that is to be thanked for their ministry in a tangible way. This might be an annual dinner, hand-written cards, a commissioning, or some other way of saying thanks other than a verbal thanks passing in the hall or after one of their programs. We are Eucharistic communities, saying thanks in concrete ways exemplifies the gratitude we have in our hearts for God's blessings received through their work and helps them to understand that their work is sacramental, too. We don't do this enough and it really makes an huge difference in our community's common life.

Event with a Stewardship Focus: This category is a specific Stewardship Ministry event like running the Share Save Spend program for the parishioners or the Halloween Candy Tithe with the candy proceeds going to a community children's crisis center. It may also be distributing a resource like a Lenten Reflection Booklet – online for an even stronger Stewardship message but printed, for those without online access. Celebrating Earth Sunday with some planned reduce/reuse/ recycle programs are a great way to teach and celebrate our care for the earth and all that is in it. A Parish Workday is also a great opportunity for a *stewardship* event when we utilize it as a teaching moment to talk about being stewards of all we have for Christ's mission. This also is a great example of something your congregation is already doing that can be plugged into the Matrix but re-framed into a Stewardship teaching opportunity.

ACTION PLAN COLUMNS

The Activities Column lists either a specific activity or a general activity for each category on a monthly basis. The other columns organize the related resources, ministries and publicity needed to execute the categories' programs each month.

The Resources Column offers a place to list the resources available for each specific category's activity every month. These resources include any people or programs available to assist in the execution of the activity. This is a great place to brainstorm and involve those outside the Stewardship Ministry Team.

The Ministries Column simply is a place to list the different ministry groups that are involved in coordinating the specific activity of the month for that category. Be creative here and don't limit it to the "usual suspects".

The Publicity Column gives an opportunity to list the ways the activity will be promoted in the congregation and community. This includes the weekly announcements/bulletin, newsletter, email blast, mailed invitations, local newspapers, and many other ways to promote an event. Don't forget to list the Ministries and Resources available to carry out this vital communication piece.

Six Best Practices - Stewardship Strategy Assessment

Identify (mark) what your church is already doing in the following list.

Briefly share with your group 1-2 things in the list that you are doing best and how.

I. Operational Management- Sound Fundraising Methodology

- _____ 1. Mission clarity: review and renew the congregation's mission statement every 3 years.
- _____ 2. Narrative budget: develop a narrative "case statement" (vision for mission) that tells the church's story and connects dollar amounts with the congregation's mission priorities and ministries.
- _____ 3. Annual giving program: ask members and adherents to make estimates of their annual giving and to base it on a proportion of income.
- _____ 4. Multiple opportunities for financial giving: ensure people can give in many ways through the year (e.g., regular offering, systematic electronic payment, special offerings, credit/debit card, fundraising events, planned (legacy) giving).
- _____ 5. Donor appreciation: phone, visit, or send givers personalized thank-you letters with quarterly and annual reports and tax receipts. Statements include ministry stories of how gifts are being used to make a difference.

II. Stewardship Integration in Worship - "Stewardship Every Sunday"

- _____ 1. Plan worship with stewardship worship resources.
 - a. Minutes for Mission
 - b. Stewardship bulletin inserts
 - c. Online stewardship worship resources www.united-church.ca/planning/theme#stewardship
 - e. Stewardship "Seconds" in bulletins
- _____ 2. Preach stewardship almost every week.

Use lectionary-based stewardship Sermon Starters. [Above URL includes Sermon Starters that coordinate thematically with Offering Invitations (see below) and with the bulletin Stewardship Seconds (above).
- _____ 3. Nurture young stewards through children's messages or theme time.
- _____ 4. Celebrate the offering as an act of worship.
 - a. Use an Offering Invitation that connects people's lives with God's mission.
 - b. Dedicate offerings (including those given through electronic funds transfer) with an Offering Prayer. {One source for Offering Invitations and prayers linked to lectionary texts for each week is online at < www.united-church.ca/planning/theme/invitededicate >.

III. Stewardship Formation - Create a Culture of Gratitude and Generosity

The primary purpose of stewardship formation is to nurture individual and congregational identity as stewards and disciples, rather than as consumers. A secondary (and welcome!) outcome of good stewardship formation is greater generosity.

- _____ 1. Stewardship formation opportunities for young people in

Adapted from a resource created by Barbara Fullerton, Stewardship Development, United Church of Canada.

To contact Barbara: Email bfullert@united-church.ca Or 416.231.7680 (x4161)

To contact TENS: Email tens@tens.org

- a. youth confirmation training
- b. youth group activities
- c. Sunday school
- d. Children's Time in worship

- _____ 2. Adult stewardship discussions in
- a. Seekers or new member classes
 - b. Bible study or other small groups for discussion/study
 - c. legacy giving education: how to arrange major and end-of-life gifts
 - d. personal-finance training and budget counseling for individuals and families

IV. Stewardship Leadership - Leadership Development and Support

- _____ 1. Clergy and lay members active in wider church roles (Convocation, Diocese, Province, General Convention, ecumenical work, etc.)
- _____ 2. Opportunities provided/encouraged for leaders to attend stewardship training events

V. Spiritual-Nurture Opportunities

Understanding one's identity as a steward goes hand in hand with spiritual growth. People growing in discipleship are generous with their lives, including their money.

- _____ 1. Bible study
- _____ 2. Small group ministries

VI. Engagement in Social Justice Concerns

- _____ 1. Parish (or area-wide); Diocesan; and/or Episcopal Relief & Development (or similar) based promotion and support
- _____ 2. Social justice learning and advocacy opportunities
- _____ 3. Active involvement by the congregation in community social outreach
(More than giving money-people volunteer time, skills)

Note potential growth areas; choose 1-2 practices that you did not mark. Brainstorm together how you might go about implementing them.

To develop an integrated year-round congregational stewardship strategy, **add an additional item every six months.**

Stewardship University™: Annotated Resource List

Updated, Fall 2012

Christopher, J. Clif **Not Your Parent's Offering Plate: A New Vision for Financial Stewardship**, Abingdon Press, Nashville, TN, 2008. ISBN-13: 978-0-687-64853-5

*REQUIRED READING. Along with Ask, Thank, Tell, this book ought to be required reading for all vestries, Bishop's committees and Finance committees—it is certainly **required reading** for ALL CLERGY IN CHARGE of a congregation. Not to be missed, or dismissed lightly.*

Christopher, J. Clif **Whose Offering Plate Is It: New Strategies for Financial Stewardship**, Abingdon Press, Nashville, TN, 2008. ISBN-13: 978-1-4267-1013-1; *REQUIRED READING*

Last year, Dr. Christopher released this second book that answers many questions from real pastors and ministers who read the first book or saw Rev. Christopher at one of his seminars: "Exactly how do I go about gaining access to the donor records when my church has prohibited it for a hundred years?" "How do I explain a meeting with just those who are strong givers without alienating those who are not?" "How can we advocate online giving without encouraging some to abuse their credit cards?" "What should letters to different giving constituencies look like?" These among many other questions are addressed in this excellent sequel. *Required reading for ALL CLERGY, as above.*

Durall, Michael **Creating Congregations of Generous Givers**, Alban Institute, 2000. On Sale: 20% off: only \$11.20 from Cokesbury.com: "Asking parishioners for money is very different from creating congregations of generous people. In this provocative book, stewardship consultant Michael Durall argues convincingly that annual pledge drives inadvertently perpetuate low-level and same-level giving in congregations. Written with the voice of experience, **this book will help clergy and lay leaders initiate and sustain effective stewardship programs.** Durall believes that asking for money eventually becomes routine, even tedious—but creating a congregation of generous people becomes ever more meaningful with passing time." 2001 Alban Book of the Year. *Required Reading for Clergy, Vestries & Bishop's Committees, et al.*

_____, **Beyond the Collection Plate: Overcoming Obstacles to Faithful Giving**, Abingdon Press, ISBN-13: 9780687023158; ppbk, \$18, from Cokesbury.com: "Written for pastors, finance committees, and everyone involved in the financial life of congregations, *Beyond the Collection Plate* will serve as an indispensable guide to how the priorities of God's kingdom can determine how money in the church is raised, managed, and spent. This book is intended to help readers strengthen the bond between parishioners' daily lives and their charitable giving. It analyzes attitudes in church toward giving and managing money, demonstrates how many prevailing practices in stewardship campaigns and fundraising have lost their effectiveness, and provides strategies for encouraging more sacrificial giving." *AN EXCELLENT PAIR OF BOOKS BY DURALL!*

Grimm, Eugene, and Miller, Herb **Generous People: How to Encourage Vital Stewardship** (Effective Church Series) Abingdon Press, Nashville, TN, 1992. ISBN-10: 0687140455 ISBN-13: 978-0687140459 *Recommended.*

Jamieson, Janet T. & Philip D. **Ministry and Money: A Practical Guide for Pastors**, Westminster John Knox Press, Louisville, KY, 2009. ISBN 978-0-664-23198-9. This book is EXACTLY what its title says it is, and so much more. *For any member of the clergy who has been intimidated by money, financial reports and the budgeting process.* But that's not the best part—it's the Theology of Money section that makes this book invaluable. Dare I say it's required? *Strongly Recommended.* Save 35% online at www.Cokesbury.com right now!

Lane, Charles R. **Ask, Thank, Tell: Improving Stewardship Ministry in your Congregation**, Augsburg Fortress Publishers, Minneapolis, MN, 2006. ISBN-10: 0806652632; ISBN-13: 978-0806652634 **REQUIRED READING.** *A virtual paint by the numbers book on how we must begin to see Stewardship as a discipleship matter, and how to best ask, thank, and tell our people about what we do as a church and how people's gifts of money to our congregations help transform lives.*

Robertson, C.K. **Transforming Stewardship**, Church Publishing, New York, NY, 2009. *Practical, hands on guide to doing effective stewardship in congregations, and a good supplement to the philosophy offered in Lane and Christopher above. Filled with anecdotes and ideas that inspire, the tools offered in the last half of the book are worth the price alone!*

CHRISTIAN FORMATION STUDY RESOURCES for use in an Adult Ed. class

Macomber, Debbie **One Simple Act: Discovering the Power of Generosity**, Pocket Books, ISBN-13: 9781439175576, ppbk; Cokesbury.com, 20% discount: \$6.39 **STRONGLY RECOMMENDED FOR ADULT STUDY GROUPS.** "In a world that often seems stingy and grudging, Debbie Macomber has seen that living in a spirit of kindness and charity can yield unforeseen miracles. In *One Simple Act*, Macomber shows how lives are changed in unimaginable and wonderful ways by "random acts of kindness," providing real stories to help readers discover what happens when we commit simple acts of generosity. Written with Macomber's award-winning skill and sensitivity, *One Simple Act* is a call to action, inviting readers to live with open hands to change lives—including our own—in ways never imagined." –debbiemacomber.com

Powell, Mark Allan **Giving To God: The Bible's Good News about Living a Generous Life**, Wm. B. Eerdmans Publishing, Grand Rapids, MI, 2006. ISBN 978-0-8028-2926-9 *Excellent scriptural grounding throughout, that all belongs to God, the honor of being a "steward," and much, much more. A perfect book for Sunday school, Advent or Lenten series.*

Twist, Lynne **The Soul of Money**, W.W. Norton & Company, New York, NY, 2006. ISBN-13: 978-0393329506 *Written by an experienced fundraiser, The Soul Of Money explores our relationship with money and how that affects our culture, lives and spirit. Though not expressly religious, this would be an excellent book for an Adult Christian formation, supplemented with scriptural texts to illustrate her points. You'll look at your own money differently when you've finished this great book.*

ONLINE SPIRITUAL GIFTS INVENTORY

Here are two web based spiritual gifts inventory that prints out your results on your computer's default printer:

<https://www.do-my-profile.com/actions/showquiz.php?password=divinity&companyid=9404>

<http://archive.elca.org/evangelizingchurch/assessments/spiritgifts.html>

I think the first link is better, more exhaustive, and the output more useful.

STEWARDSHIP PROGRAMS

These programs are a "out of the box" type operations that require significant preparation for optimum results—don't wait until the last minute! Get now and allow yourself all the time needed for maximum effectiveness. (These are presented in no particular order or preference. Research each one for appropriateness for your specific congregation's needs.)

Enough:

Discovering Joy Through Simplicity and Generosity **\$29.99** for DVD; **\$9.44** for Leader's Guide
<http://www.cokesbury.com/forms/search.aspx?ddlSearchScope=&txtSearchQuery=enough%20by%20adam%20hamilton>

Church leaders are struggling to help their congregations respond to the violent ebb and flow of the economy. While their members are simply trying to stay afloat financially, the budget of their church is suffering as well. In the midst of all of this, though, there is God and a divine calling for each of us.

With *Enough* Stewardship Program Guide, Adam Hamilton offers a simple campaign that will transform how the church and individuals view the role of money in connection with their life's purpose and the positive impact that transformation will have on the world.

Extravagant Generosity: The Heart Of Giving Planning Kit **\$55.19** (20% discount)
<http://www.cokesbury.com/forms/ProductDetail.aspx?pid=940973>

Stewardship programs rise or fall on their ability to do two things: first, provide church leaders easy-to-grasp yet comprehensive help in planning and implementing the program; and second, connect stewardship to the spiritual lives of all the members. Created by Michael Reeves and Jennifer Tyler, *Extravagant Generosity* is built on Bishop Robert Schnase's groundbreaking book *Five Practices of Fruitful Congregations*.

Program includes: An overview timeline, providing quick information on what happens during each week of the stewardship campaign; a guidebook for leaders that covers all aspects of the campaign, from detailed plans for each of the four Sunday services to marketing materials like flyers and postcards to e-mail messages and letters designed to be sent to specific groups within the congregation—all available on the enclosed CD-ROM; a small-group leader's guide to host Sunday school and other small groups during the program; a DVD with video segments for four group-study sessions and short clips for use in worship.

Grow One Sunday Stewardship program on-line **\$10.50 + \$9.25** per 100 Commitment cards
<http://www.cokesbury.com/forms/ProductDetail.aspx?pid=439779>

Experiences in congregations of many denominations across the United States indicate that **Grow-One Sunday is especially valuable in six kinds of churches:** 1.) Small congregations 2.) Churches that have never conducted an annual stewardship program 3.) Churches whose unpleasant experience with an ineffective stewardship model in past years prejudiced them against conducting any kind of financial stewardship program 4.) Large churches that find the traditional "celebration luncheon" in the popular **New Consecration Sunday Stewardship Program** logistically impossible, due to lack of space 5.) Churches that want to change from a stewardship program they have used for several years but seems to have lost its appeal 6.) Churches that want their financial stewardship education to focus on spiritual growth rather than on fund-raising.

Grow-One Sunday is a spiritual-growth program as well as a financial campaign. It **is based on the biblical theology of "the need of the giver to give" for his or her own spiritual development**, not on the "need of the church to receive" in order to balance its budget. Permission is granted to photocopy the complete program (not excerpts) for use in congregations.

Committed to Christ: Six Steps to a Generous Life by Bob Crossman, Abingdon Press, \$80.00, UPC: 843504028886, from Cokesbury.com. "A six-week stewardship program that presents giving as a lifelong journey in Christian discipleship. After an introductory Sunday stressing the importance of commitment to Christ, the next six weeks are spent exploring six steps to a generous life: Prayer, Bible Reading, Worship, Witness, Financial Giving, and Service. With each step, through worship, sermons, and small group activities, the congregation is asked to assess prayerfully their own level of commitment and to consider increasing that commitment by one step. Equal emphasis is placed on each of the six steps, clearly communicating that *this program is not simply about money, but rather cultivating a thankful heart that will lead us to giving more than we can ever imagine.*" Perfect for a Lenten program—the small investment to do this right will make a lasting, life-changing impact on your congregation. **HIGHLY RECOMMENDED!**

Transformed Giving Stewardship program **\$81.99 + \$11.00** per 100 Commitment cards
<http://www.cokesbury.com/forms/search.aspx?ddlSearchScope=&txtSearchQuery=transformed%20giving>

You can give your members the refreshing benefits of a 40-day spiritual development program... far more attractive to them than a standard contribution series. Your congregation will see that financial solicitation is not the primary focus of this 40-day study. However...**enhanced giving from the heart will flow out as one result of this faith-building experience.**

Once a week, your adult classes or small groups can all experience identical lessons, which build on the shared themes found in your private daily readings during the past 7 days. The questions provided in your *Treasures of the Transformed Life* Participant's Workbook can also serve as discussion starters for your group. Group commitment to the same private daily readings of

Treasures of the Transformed Life over a 40-day period can provide your Sunday School class, small group, or entire congregation with a unifying experience.

Your church can enjoy all the benefits of greater unity. Through synchronized private readings, group study, and coordinated worship messages...your entire congregation can be immersed together as a single body in the same fulfilling step-by-step transformation. This shared experience can lead them in unity to improved stewardship.

***With God's Permission* (FREE from ELCA)**

<http://archive.elca.org/stewardship/withgodspemission/>

"With God's Permission," is a program of financial response based on ***an asset-based approach*** to congregational dynamics. This simple program can help your congregation fund God's mission in a fresh and exciting manner, providing enjoyment and energy to the task of asking for and receiving commitments for financial support from your congregation members.

"With God's Permission" is a worship-based financial response method – i.e., members' financial commitments collected during a worship service – and also includes members in several preparatory "mini-events" during the three Sundays preceding a final Sunday worship service.

This program lasts a total of eight weeks, including three single-Sunday 90-minute after-worship "mini-events," a Sunday "Celebration of God's Permission", and one week each of preparation and follow-up.

***Make it Simple: A Resource for Stewardship Education and Annual Response* (FREE from ELCA)**

<http://www.elca.org/Growing-In-Faith/Discipleship/Stewardship/Make-it-Simple.aspx>

Make It Simple is a congregational stewardship resource to assist you in stewardship education-- about simplicity and generosity--and in conducting a response method by which you collect congregation members' commitments to support financially God's mission in your midst. May God's Spirit embolden you in your stewardship and your service. ***Great resources, including video!***

Personal Financial Management programs

It behooves us to help people sort out the financial mess their lives might be in. The first two programs will do that, while the other will challenge the routine way we think about our money.

Three Simple Rules, by Theo A. Boers, www.threerules.org

This book is written from a Christian perspective, but first and foremost it is based on sound personal financial management principles. The Addendum includes two pages referencing scriptures dealing with work, honesty, giving, saving, taxes, and contentment. It offers a step-by-step process of realistically setting goals and addressing needed changes to spending, debt, assets, and income. The easily understood language and examples will help the reader confidently walk through the pages to improve their financial life. A Leader's Guide is available, with accompanying PowerPoint presentation, to make this an easy to prepare and deliver financial course for your people.

Money Matters: Financial Freedom For All God's Churches, by Mike Slaughter

Imagine feeling free from financial worry, free from debt, and free from the never-ending pressures of juggling all those financial demands. Imagine...feeling in control of your finances. ***MONEY MATTERS: financial freedom for all God's children*** (leader's Guide w/ DVD) shows you how to do God's math, on spiritual principles found in Scripture: Debt-Free Living, A Disciplined Lifestyle, Surrender & Trust, Stewardship vs. Ownership, Focus & Planning, Easy Simplicity, Creating vs. Consuming, Generosity. Each participant will household will need a copy of the ***MONEY MATTERS*** book.

Share. Save. Spend. by Nathan Dungan

Their new product is: Financial Sanity. The *Financial Sanity* DVD and Leader's Guide provides a simple but complete script to help you lead a group through all four one-hour sessions of the Financial Sanity seminar. You don't need to be a financial advisor or a professional speaker to effectively facilitate this seminar. Best of all – it requires minimal preparation to get started. See it all at: www.sharesavespend.org

The Episcopal Diocese of Newark
Fund Development Committee

PLANNED GIVING AS A PART OF ONGOING STEWARDSHIP

- Stewardship: "All that we do with all that we have all of the time"
- Helping congregations begin or maintain a program to encourage estate gifts

Resources:

The Episcopal Church Foundation
815 Second Avenue
New York, NY 10017

James W. N. Murphy, Managing Program Director, Financial Services
Meg King, Assistant Program Director
800.697.2858

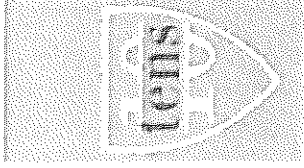
www.episcopalfoundation.org

click on "Resource Library" (upper right link on homepage)
scroll down to "Planned Giving Brochures & Booklets"
or
scroll down to "Planned Giving Directory of Services"
or
scroll down to "Funding Future Ministry"

Diocese of Newark

David C. Farrand
300 Oak Ridge Avenue
Summit, NJ 07901
908.273.8225
dcfarrand@aol.com

Year-Round Stewardship:
Planned Giving Resources
May 16, 2013



The Episcopal Network for Stewardship

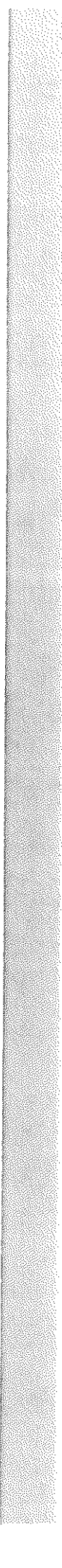
ASSESSING CONGREGATIONAL VITALITY:

where do we begin the conversation?

Mary M. MacGregor
Director of Evangelism & Congregational Development
Episcopal Diocese of Texas mary@epicenter.org



• **Assess-** measure, gauge, quantify, estimate, take a reading



• **Vitality** - the peculiarity distinguishing the living from the nonliving, power of enduring, lively and animated



How to Start:

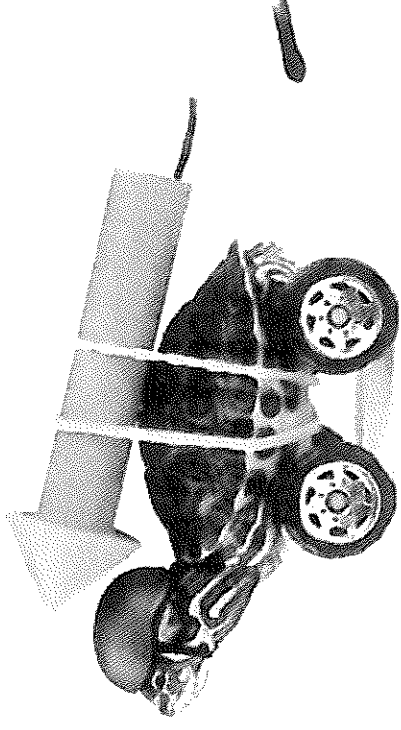
- Refer to *The Ministry of a Change Agent*

Start with Gathering Information

- Identify Congregation's Context and DNA to Determine Stewardship Culture
- Stewardship Assessment? Get in advance the following information about the congregation you are serving:
 - **A 10 year retrospect on the following:**
 - -mission, core values, vision statements if any and usage
 - -membership in good standing
 - -average Sunday attendance
 - -plate & pledge totals
 - -pledging units and average pledge
 - -capital campaigns/total raised/goals met?
 - -endowments
 - -congregation's donations to outside mission
 - -fund raising events a year to support budget
 - -stewardship committee or vestry committee
 - -ages of congregational members
 - -debt service
 - -frequency of designated giving
 - -methodology for annual giving campaigns

Identify Catalyst for Action

- What has precipitated your entry into this congregation as a change agent?
- What is the catalyst that opens the opportunity for change?



Facilitate Conversation

- SURVEYS
- Recommended Surveys That Assess Current State of a Congregation
 - Annual Giving Campaigns Survey
 - Congregational Survey of Stewardship Practices
 - 12 Marks Healthy Church Behavior
 - Children's and Family Assessment Survey
 - Invite, Welcome, Connect Assessment Tools
 - Youth Ministry & Culture Questions

Stewardship Culture Survey

Annual Giving Campaigns Survey

Where is the congregation's place on this scale?

Motivation to give to this church is born out of-

Scarcity..... Abundance
Budgets, membership, sense of fair share Gratitude, generosity, discipleship

Survey staff, vestry, stewardship committee members, ministry leaders

Facilitate Conversation

• Appreciative Inquiry

- Appreciative Inquiry adopts a different set of assumptions from common empirical assumptions summarized below.

Empirical Process

- Define the problem
- What to stop
- Fix what's broken
- Focus on decay
- What problems exist
- Learn from mistakes
- Who is to blame?

Appreciative Process

- Search for solutions that already exist
- What strengths to build on
- Amplify what's working
- Focus on life giving forces
- What is working well
- Learn what's working
- Who is to affirm?

Asset/Ministry Mapping

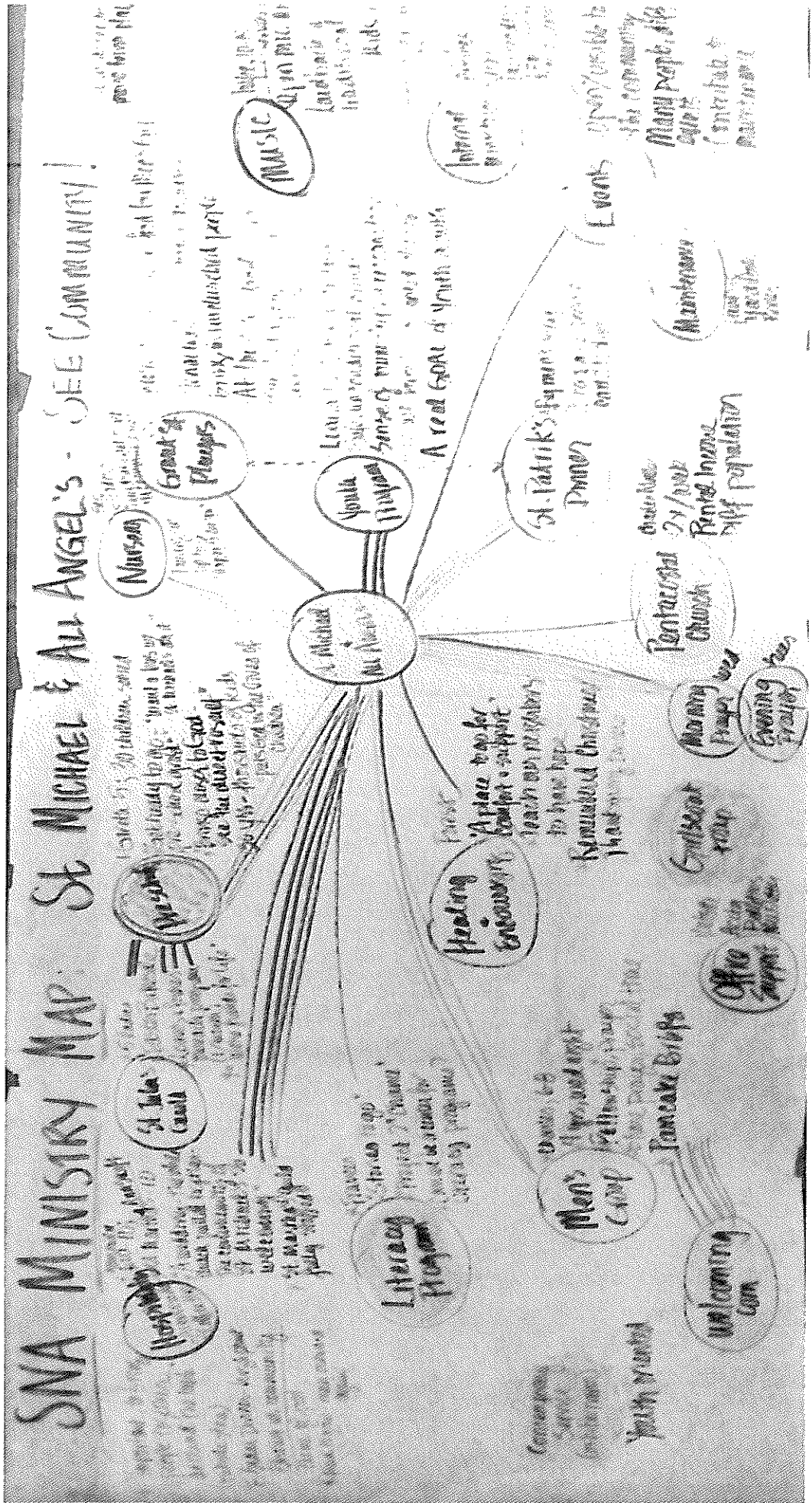
How It Works

- Facilitated process with a large group or small committee, any size
- At least 2 facilitators, one questioner, one recorder
- Can be singular or multiple ministry focused
- Can be combined with Appreciative Inquiry types of questions focusing on the strengths of the group
- Visual representation of ministries is built by the facilitated discussion

Opportunities It Provides

- Creates a clear visual aid defining ministries
- Promotes discussion and can inspire action to support ministries currently underway in a congregation
 - expands inclusion
 - Includes stories as well as metrics
 - Builds on the positive core of a congregation
- Identifies entities, locations, individuals and numbers involved in ministries
- Provides snapshot of ministry for education of congregation and new members
- Reveals gifts/leadership present in the congregation
- Supports sharing of best practices
- Helps identify voids in ministry which can be addressed later

Combination of Ministry Mapping & AI



Sample Deanery Map



In an Ideal World...

- Process reflects mission and goals, produces information, and allows multi-level analysis
- Diocese owns the resource database
- Start with a common data collection format
- Create a self-supporting network of facilitators – the “system” owns the process
- All parishes participate, creating a two-way communication venue through shared data, common language and mission

Reflection, Sharing, Consensus Building

- Discuss the topic or do a visualization exercise
- Ask individuals to answer specific questions on paper for no more than 7-8 minutes
- Share answers in small groups
- Groups build consensus answers
- Groups report out to whole group



Large group sees where there is consensus and narrows answers down to key points, goals, etc.

Open Space Technology

Large Group Exercise (minimum 20 to huge groups) to Discuss Topics of Interest. Second and third rounds can lead to recommendations or goal setting and planning.

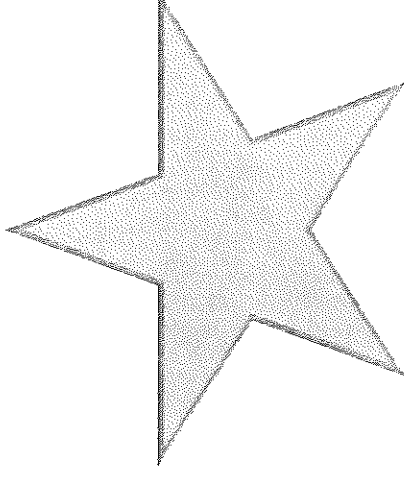
-Can be directed to a specific topic like stewardship

Facilitator Asks:

What aspect of stewardship in this congregation would you like to lead a discussion on?

- Individuals determine topics
- People interested in the topic join together
- Vote with feet
- Groups have note takers and report back to full group
- Repeat process to go deeper to create recommendations, goals or planning

STAR Questioning



- S – Situation
- T - Task
- A - Action
- R – Result

To uncover information about the work of a person or group which is directed at a specific topic like stewardship.

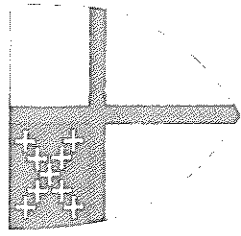
More Common Conversations

- Mini-Teaching, ask for responses to teaching as they relate to the topic and context, repeat teaching, repeat response
- Prayer, worship, bible study, reflection

Assessing and Assuring

- Closing the Loop & Completing the Work
- Once the assessing is complete, assuring/identifying leaders will follow up with goals to address what they envision is essential.
- What kind of accountability will be determined? Who will follow up? Will there be mentor partners involved? **This is an essential last step in completing the work of a change agent!**

And now, Father, send us out to do the work you have given us to do, to love and serve you as faithful witnesses of Christ our Lord, to him, to you, and to the Holy Spirit, be honor and glory, now and for ever. Amen



...And now, Father, send us out to do the work you have given us to do, to love and serve you as faithful witnesses of Christ our Lord, to him, to you, and to the Holy Spirit, be honor and glory, now and for ever.

Amen

BCP 366

STAR Questioning Building STAR Questions

STAR questions are commonly used in human resource interviews. They uncover previous experiences including situations/task, actions taken and results of the actions. The objective of asking STAR questions in a congregational assessment would be to uncover specific situations/actions in the past, who did them (individual or group) and what the results were. This is a good questioning method to discern specific information about a group, leader or congregation.

Writing STAR Questions: Situation or Task, Action, Result = STAR

Questions	Action Questions	Result Questions
<ul style="list-style-type: none"> ◆ Describe a situation when... ◆ Can you tell us about a time. . . ? ◆ What were the circumstances surrounding . . . ? ◆ What was the most memorable time when... 	<ul style="list-style-type: none"> ◆ Exactly what did your (vestry, group, rector, ministry leader) do? ◆ Describe specifically how your (vestry, group, rector, ministry leader) did that. What did your (group, vestry, rector, etc) do first . . . second? ◆ Describe your specific role in the project. ◆ Walk me through the steps your (group, vestry, rector, etc) took. 	<ul style="list-style-type: none"> ◆ What was the result? ◆ How did it work out? ◆ What problems/successes resulted from... ? ◆ What feedback did your group, vestry, rector, etc) get?

Follow -Up Questions to Turn False STARs into True STARs

- ◆ Can you give me a specific example of when this recently happened?
- ◆ Describe one particular time when...
- ◆ Walk me through the process step-by-

Follow -Up Questions to Obtain Additional STARs

- ◆ How about another example of . . .
- ◆ Compare this situation to one in which your group, vestry, rector . . .
- ◆ Can you describe another time when your

step, explaining what your role was.

- ◆ Exactly what part did you play?

group, vestry, rector. . . ?

The Mission (Purpose) of (name of the church)

(Sample: Holy Trinity Episcopal Church seeks to kindle the Holy Spirit through love, service, worship, and spiritual growth, welcoming all to join us as one body in Christ, fulfilling God's mission.)

The Mission (Purpose) of the Episcopal Church.

The Mission of the Church is to restore all people to unity with God and each other in Christ.

How Does the Church Pursue Its Mission?

The Church pursues its mission as it prays and worships, proclaims the Gospel, and promotes justice, peace, and love. p. 855 Book of Common Prayer

The goal of change in the church is to take each person to a closer place of fulfilling the church's mission. This involves human development and behavioral changes on each person's part. The human development usually involves mental, spiritual and emotional changes. What must be done to impact human development, to change behaviors, to restore all people to unity with God and each other in Christ?

Do not confuse results with activities to support human development.

Samples of results:

Activities to support human development which will create changes in their mental, emotional and spiritual behaviors.

How Will We Know?

by Sarah B. Drummond

Ministerial leaders often rely as much on the Holy Spirit as they do on a strategic plan. In even more cases, they rely on intuition and gut feelings when putting a new program on the ground. Leaders have a hunch that there is a need to reach out to a population, to serve a community, or to try something new. So they make a foray into new territory to give something a try. If that foray goes well, they must backtrack to answer crucial questions about leadership, resources, and sustainability. Program planning models can help them do this, just as they help in the creation of new initiatives or the re-creation of lapsed initiatives. Even programs that appear to be working well "on their own" cannot continue over time without effort, intentionality, and structure.

Leaders tend most often to build upon and strengthen programs that are already up and running than to create new programs. A junior-high youth group emerges from a gaggle of sixth graders playing air hockey after church. A men's fellowship grows out of an annual fishing trip. A food pantry morphs into a soup kitchen. It is leaders' responsibility to create infrastructures that uphold such initiatives and that anchor programs in the life of a community, connecting them to the resources they will need to sustain life beyond the happenstance and haphazard phase. The theoretical resources that have been most helpful to me in midcourse, whereby a free-flowing activity becomes a structured program offering, have come from the world of institutional change theory. The more we understand about change as leaders, the better equipped we are to guide the change toward fulfilling our organization's mission as effectively and faithfully as possible.

New programs in a community—even a historic community like a long-established church or university—are like teabags in a cup of hot water. Over time, they change the color and nature of their setting, even if just a little. Change leadership theory can help a person responsible for leading or creating a program to consider what must go into such a program and the institutional change it will, by nature, create.

Harvard Business School's John Kotter proposes eight steps toward program planning in an institutional setting to create a program or change initiative that is bound to succeed. Each of Kotter's steps has something special to say to a leader in a religious organization, but there are three in particular to highlight here: urgency, communication of the change vision, and short-term wins. I single out these because, in my experience, they are the steps religious organizations skip most frequently, at the peril of their programs' success.

First, urgency: I once heard that a pastor telling a church to change when it sees no reason to do so is like a doctor prescribing chemotherapy to someone who comes in complaining of a headache. A leader who urges change without first helping participants to see why change is necessary is bound to fail. Conversely, to frighten participants into willingness to change is both unethical and manipulative. It is common in religious organizations for leaders to cry wolf, scaring stakeholders with

"the sky is falling" warnings to promote a particular agenda. Leaders might, without ill intent, frighten each other and parishioners with dramatic presentations on declines in membership or giving. Yet I have never heard of a church membership drive that succeeded when the motivation of those doing the evangelism was fear. Finding the right level of urgency is an art in leadership.

Second, communicating the change vision: We all know that participants in religious organizations tend to be busy people, often "joiners" who participate in numerous other communities. Although this is not always true, it is true often enough that leaders must consider how to communicate change to over-stimulated people. In the case of many change initiatives in religious organizations, communications are designed for the deeply involved and over-conscientious. The very involved are precious members of faith communities, but communications about change should not aim for them. They should aim toward the middle—the attention span and engagement of the typical person, rather than the especially invested member. If we communicate clearly and often, the very attentive participants in the faith community may be puzzled by the frequency, but the word will get out.

Third, generating quick wins: Change tends to move slowly in religious organizations. When change happens slowly, it is hard to see. Think of the proverbial activity of "watching grass grow." Leaders need to be mindful that the energy that moves a change effort ahead comes from enthusiastic participants who want to see change; if those participants cannot see change, energy is bound to flag. Kotter suggests that leaders must build in short-term successes that make a visible splash in order to keep energy for change running high.

Of these three, the nature of visioning in religious organizations has a special consequence. In faith-related institutions such as churches, participants might hold a variety of images about the true mission of the organization. In a business setting, one can assume that all hope the business will be profitable. In a religious organization, however, some might see a successful ministry program as one that brings in new disciples, while others want to take better care of current members. Some might see individual spirituality as most important, while others believe that communal togetherness is the ideal. In such a context, where it is not uncommon to find a pew of ten people, no two of whom agree on what the organization is truly "for," talking and thinking about vision are crucial.

When creating a new program or renewing a continuing program, leaders must describe what success would look like. They then must talk together, early and often, about how they will know whether that vision of success is coming to life. Because it is easy to forget to ask these questions during a program planning process, I encourage leaders to ask themselves continually while designing their programs, "How will I know?" How will I know if we are meeting our goals? How will I know if we are making the right kind of progress? When leaders are mentally in "planning mode," they focus a great deal of their energy on the programs they are planning and what successful programming demands. Yet the program's success is not meant to stand only on whether participants enjoyed it. Rather, the program is meant to bring about transformation in the lives of individuals and communities. How will we know if this is happening, especially if our attention is consumed by making the program function?

Leaders in religious organizations must consider process and outcomes simultaneously. If the process associated with a program—the lived experience of a program initiative—goes poorly, the program will fail to attract or retain participants. If participants attend entertaining programs but experience no growth or transformation, the process might be excellent, but the outcome will not live up to its goals. During program planning, leaders must work together to build in both process evaluation and outcomes evaluation. That means they must have a mental, and eventually written, idea about both what a successful initiative might be and do, and what kinds of transformation they would like to encourage.

All life is cyclical in some way, and even historic ministry programs wax and wane over time. If leaders are focused mostly or exclusively on program offerings rather than on the goal toward which those programs strive, they can easily get stuck. The program offering becomes distanced from its original goal and stops achieving that goal, and then the program outlives its purpose. If leaders put purpose first, they are free to change program offerings as time and circumstance dictate. Over time, different means are required to meet the same goal. Leaders who put the program's goals first do not get too attached to particular means for reaching those goals, providing the opportunity to always keep their ministries focused and fresh.

Comment on this article on the [Alban Roundtable blog](#)

Adapted from [Holy Clarity: The Practice of Planning and Evaluation](#) by Sarah B. Drummond, copyright © 2009 by the Alban Institute. All rights reserved.

FEATURED RESOURCES

[Holy Clarity:
The Practice of Planning and Evaluation](#)
by Sarah B. Drummond

In *Holy Clarity*, Sarah Drummond explores the most basic reason leaders of religious organizations conduct evaluations: To find and create God-pleasing clarity regarding the organization's purpose and the impact of its activities. Leadership and evaluation are not separate disciplines, she argues. Effective leaders evaluate because they need to know what is happening in their organizations and how those activities are effecting change.

[Projects That Matter:
Successful Planning and Evaluation for Religious Organizations](#)
by Kathleen A. Cahalan

Projects That Matter is a primer for project leaders and teams about basic project planning and evaluation. Intended for the nonexpert, the book introduces readers to the five basic elements of project design and describes in detail a six-step process for designing and implementing a project evaluation and for disseminating evaluation findings. Project leaders in congregations, colleges and seminaries, camps and other specialized ministries, and other religious settings will find Cahalan's guidance clear and invaluable.

Shaping Spiritual Leaders:
Supervision and Formation in Congregations
by **Abigail Johnson**

Recognizing that supervision is important in the formation of lay leaders and in the life of candidates for ordination, Johnson has developed this book to guide all who supervise others in a congregation. She views supervision as a ministry and shows how leaders can use their own innate gifts to enhance their supervision skills. Supervision can become an opportunity for mutual growth and learning that strengthens all other areas of ministry.

Completing the Circle:
Reviewing Ministries in the Congregation
by **David R. McMahill**

Based on needs he saw from several congregations looking to evaluate their ministers, McMahill looked for ways to review both leaders and ministries and developed the feedback/reflection process he lays out in this book. Based on sound principles of effective communication, this simple system of asking for descriptive feedback about various aspects of a congregation's life together takes into account the specific setting and the unique relationship between minister and congregation.

Creating the Future Together:
Methods to Inspire Your Whole Faith Community
by **Loren B. Mead and Billie T. Alban**

Congregations today face a multitude of challenges in trying to adapt to a quickly changing world. Balancing new concerns with core values is a complicated process that can leave too many members feeling that their voices and needs are not being met. *Creating the Future Together* explains how congregations can use large group methods to navigate these new waters. This book is designed to familiarize leaders with these whole-system approaches and to provide a conceptual framework for evaluating their potential usefulness against any given challenge.

Copyright © 2009, the Alban Institute. All rights reserved. We encourage you to share articles from the *Alban Weekly* with your congregation. We gladly allow permission to reprint articles from the *Alban Weekly* for one-time use by congregations and their leaders when the material is offered free of charge. All we ask is that you write to us at weekly@alban.org and let us know how the *Alban Weekly* is making an impact in your congregation. If you would like to use any other Alban material, or if your intended use of the *Alban Weekly* does not fall within this scope, please submit our [reprint permission request form](#).