

# ***Annual Campaign Pledge Analysis***

## **Worksheet**

### **1). First things first: Pull together materials and calendar for a master file**

#### **Materials**

*Pull together a file of all the relevant information and materials produced for the campaign, including the "pledge packet," (letter, pledge card). Include copies of bulletin announcements, emails, thank you notes, stewardship speakers, committee members, lists used for mailing, final pledge unit list.*

#### **Calendar**

*Create a retrospective calendar so you can look back and what was done, and when for the campaign.*

### **2). Pledge Data**

#### **Campaign impact - number of pledges**

*You'll want to understand specifically who received your campaign materials and whether or not they responded.*

- *How many households were asked to pledge? Of people who received campaign materials, how many pledged? How many didn't?*
- *Were there any who pledged who didn't receive pledge materials?*
- *Did any pledge last year but not this year? How many?*
- *How many were new pledgers this year?*
- *How did people pledge? Mail in a pledge card? Submit online? Submit in person?*

*Questions to consider:*

- *Did the campaign materials reach everyone you wanted to?*
- *If not, are there actions to take this year to make sure you do next time?*
- *Can you make it easier to pledge? If very few pledged online, can you make that easier for next year?*

### **3). Campaign impact - pledge amounts**

*You'll want to understand pledge amounts, and how they compare to past years, as well as how they break down among pledging households. Understanding historical trends is also helpful.*

*In some cases the leader(s) working with this worksheet will have access to this data (who pledged and how much), but in other cases it may need to be handled anonymously, or numbers alone will be provided by the bookkeeper. Work with what you can.*

- *One useful exercise is to look at a list of amounts listed by amount, higher to lower. (This can be anonymized). Review the distribution. Are there a few pledging units whose pledges make up a large portion of the total? Many nonprofits find that 20% of their donors are responsible for 80% of their revenue. Faith organizations might be closer to 10%/90%. What is your breakdown of pledge distribution?*
- *What is the average pledge? Mean? Highest pledge? Lowest?*
- *What do you know about the smaller # of donors who make up the larger portion of revenue?*
- *What about the 80%? What can you learn about the larger group?*
- *Compared to last year, how many pledgers increased t? Decreased? Stayed the same?*

*Questions to consider:*

- *What can you learn from the distribution of pledges? Are you dependent on a small number of pledging units?*
- *What can you learn from pledge increases? Pledges staying the same? Decreases?*
- *Are there people who pledged last year but not this year?*
- *What can you understand about age cohorts? Are you more dependent upon one age group or another?*

#### **4). Campaign Messaging**

*Taking into account the pledge results, let's look at campaign materials. Consider:*

- *Was there a clear theme? Was it appealing?*
- *Did the theme carry over through all media (letter, emails, website, FB)*
- *What was the campaign focus? Budget vs ministry focus?*
- *Was there a clear call to action? Was it easy to pledge?*
- *Was there a plan for thanking people?*

*Questions to consider*

- *Can you tell more ministry stories, more effectively going forward?*
- *Taking into account what you've learned from reviewing pledge data (above) did campaign materials appeal to the age cohorts who responded?*
- *Did you show impact? Are there things you can do throughout the year to better show stewardship's impact?*

### **5). Leadership and Summary**

- *Review your list of everyone who worked on last year's campaign.*
- *Review the retrospective calendar*

Questions to consider:

- *Has everyone who worked on last year's campaign been thanked? It's not too late to thank team members now.*
- *Are there new people to add to the Stewardship team now? For example, looking at the pledge distribution and age cohorts represented, are there additions you might want to make to your Stewardship team?*
- *Are there ways to involve the Vestry in next year's campaign? Other congregational leaders?*
- *Can you do things now to make it easier to pledge and pay pledges? For example, an upgrade to the church's online giving system?*
- *Looking closely at the calendar are there activities to do now that will help next year?*