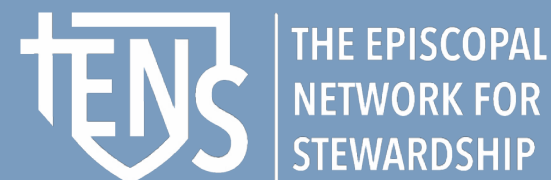




# Is Your Campaign Ready to Launch?

## Best Practices & Tools

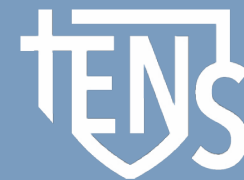
J. Davey Gerhard, *Executive Director*  
The Episcopal Network for Stewardship



# Learning Objectives

- ▶ Sobering Statistics
- ▶ Changing the Trends
- ▶ How to talk about money and faith
- ▶ What is unique about 2025 /  
Recession-proofing your finances
- ▶ Tell Out My Soul – Theme Overview
- ▶ How to use the TENS Resources for  
your campaign
- ▶ Your Questions Answered

*Introduction*



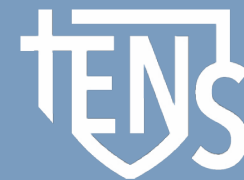
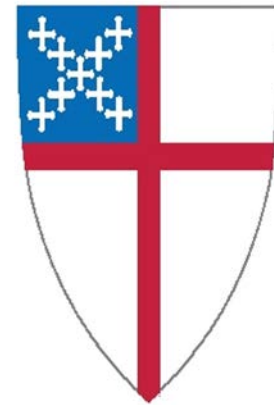
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# Sobering Statistics

- ▶ In 2024, the Episcopal Church has witnessed:
  - ▶ 2.6 % decline in active membership
  - ▶ 10.7% increase in Sunday attendance
- ▶ However!
  - ▶ 4.7% increase in contributions
  - ▶ 3.6% in average pledge amount
- ▶ This is an unsustainable trend

Source: Giving USA 2025 *Key Findings Report*

*Examining the Trends*



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# Sobering Statistics

Since 1982, giving to religion has increased steadily.

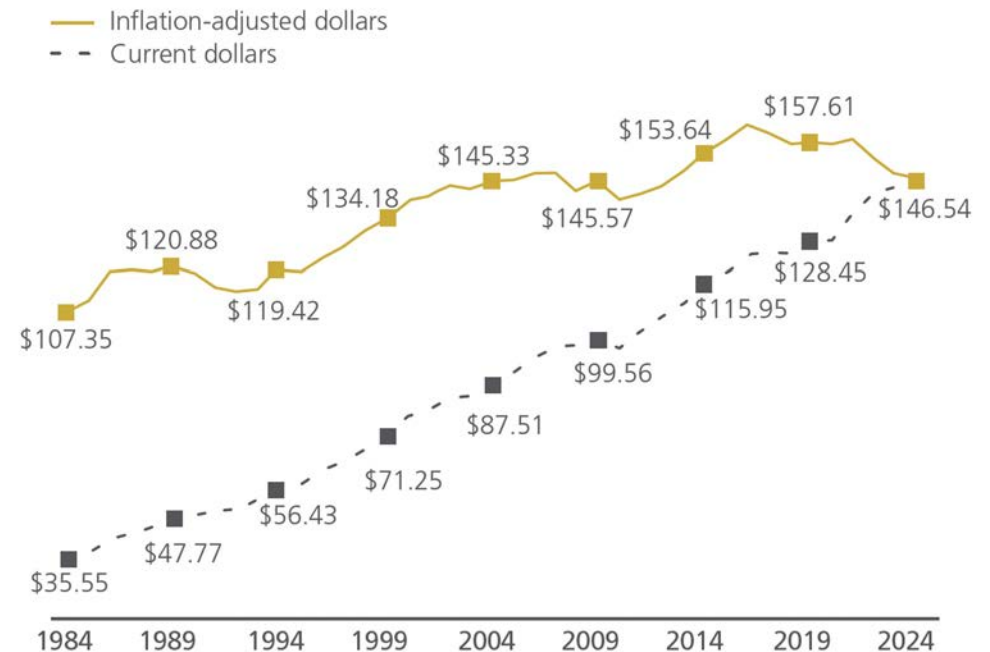
Adjusted for inflation, in the US we moved from **\$85.6B to \$143.57B in 40 years**

Source: Giving USA 2025 *Key Findings*

*Examining the Trends*

## Giving to religion, 1984–2024

(in billions of dollars)



# Sobering Statistics

Yet, our market share compared with other charitable sectors has **decreased by more than 50%**

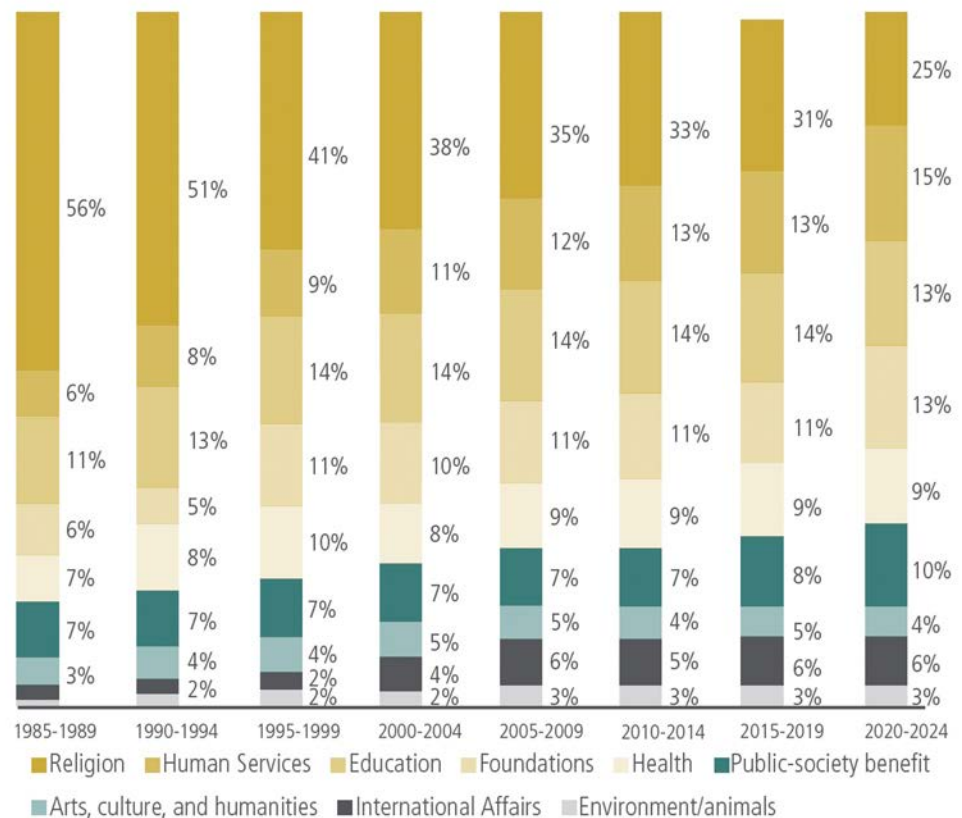
In **1983**, **56%** of charitable donations were for religious institutions. **Today it is 25%**

Source: Giving USA 2025 *Key Findings*

## Examining the Trends

## Giving by type of recipient: Percentage of the total in five-year spans, 1985–2024\*

(adjusted for inflation, 2024 = \$100)



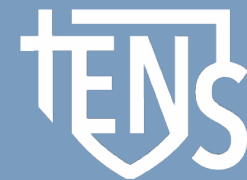
# Reversing the Trends

There is hope! We can reverse the trends!

- ▶ Run efficient campaigns that reach everyone
- ▶ Diversify ways people can give
- ▶ Include more voices
- ▶ Focus on Volunteer recruitment for your programs
- ▶ Recruit and Retain Younger Members – build sustainability



*Examining the Trends*



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# Recommendations for Your 2025 Pledge Campaign

- ▶ Formation is the Foundation
- ▶ Focus on the Mission
- ▶ Storytelling communicates authentically
- ▶ Remember Planned Giving
- ▶ Donor-Centric Fundraising



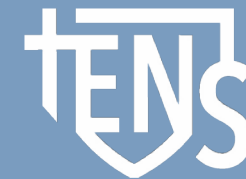
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*Stewardship Best Practices*

# Formation For Your Campaign

- ▶ Don't neglect the opportunity to do some teaching on stewardship theology
- ▶ Showcase diverse messages of creativity in communities of faith – *use the TENS weekly and seasonal reflections to help*
- ▶ Each reflection suggests a couple of questions designed to **engage us on stewardship** topics
- ▶ The reflections can also serve as **inspiration for a sermon** on stewardship
- ▶ Offer a book study on stewardship
- ▶ Small Groups are great places for stewardship dialogue

## Stewardship Best Practices



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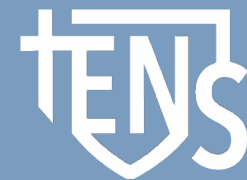
# Ministry & Mission more than Money

*Members are inspired by your mission!*

**Focus on what you do with the money that you raise:**

- ▶ Ministries that you run every week
- ▶ Your impact on the community
- ▶ How you directly and indirectly serve your neighbors
- ▶ What your church means to your town or neighborhood

*Stewardship Best Practices*



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# Testimonials Tell the Story

*There is no better way to communicate impact than for members to tell their stories of support*

## **Include things like:**

- ▶ What made them come on their first Sunday and keep coming back?
- ▶ What program or ministry they love best
- ▶ What their children have learned in Sunday School
- ▶ A time when the community was *there for them*

*Stewardship Best Practices*



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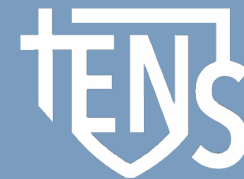
# Testimonials Tell the Story

*Ministry Impact Reports are Important Stewardship Messages*

**Ask volunteers or ministry-beneficiaries to share:**

- ▶ What the program means to them
- ▶ What joy they have in serving (tell a story)
- ▶ What makes them feel good about this program / ministry
- ▶ What it would mean if this ministry didn't exist

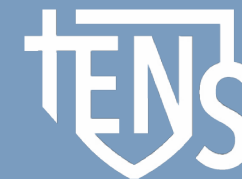
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# Make Planned Giving a part of your Campaign

- ▶ Your pledge card should ask if your members have made provision in their estate for the church, or if they would like to.
  - ▶ Soft asks repeated frequently plant the seed that legacy gifts are important spiritual tools
  - ▶ Your pledge/promise cards are a great place to remind people of planned giving opportunities
- ▶ Many members consider legacy gifts to be a “pledge legacy” – the ability for the church to receive a lifetime gift equal to their annual gift in perpetuity
- ▶ The number one reason people do not leave a legacy gift is because they were not asked!



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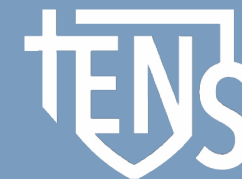
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# Virtual Stewardship

*Every congregation should have the ability to collect donations and pledges online and via mobile platforms.*

## **For plate and pledge:**

- ▶ It is no longer usual for individuals to carry cash. More and more people use their credit and debit cards for transactions.
- ▶ Receipts are automatic, as are thank-you acknowledgements
- ▶ Most donation software gives you at least basic information to reach out to visitors – at bare minimum, an email address or phone number tied to a real name
- ▶ More donors rely on online or mobile platforms to make recurring or one-time gifts to nonprofits than ever before.



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*Stewardship Best Practices*

# Maximize Donations by Maximizing Opportunity

- ▶ Donor-Centric Fundraising
- ▶ Publicize and implement multiple ways of making gifts for annual campaigns
  - ▶ Gifts directly from retirement accounts (Qualified Charitable Distributions)
    - ▶ Many donors use their Required Minimum Distribution to make their annual gifts
  - ▶ Donor Advised Funds
    - ▶ Donors make a grant from their DAF for the church
  - ▶ Bank Checks / ACH transfers
  - ▶ Online Platforms
  - ▶ Mobile Giving
  - ▶ Workplace / Matching Gifts
  - ▶ Stock and Securities



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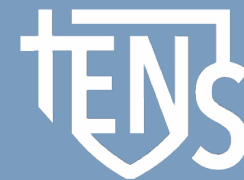
*Stewardship Best Practices*

# Asking for Money for Mission

## *How to make the ask*

- ▶ Renewal: Susan, this year we are raising more money than ever to fund our youth program, outreach to elders, and to help our community. Mary and I made our gift to the campaign, will you join us in supporting the campaign this year?
- ▶ Increase: Jonathan, my husband and I increased our giving this year because we want to see our congregation grow. Can you make a stretch gift to the campaign this year?
- ▶ Tough Year: Dick and Bill, your giving to our church has been so faithful all these years, and I know this has been a tough year for you. Still, I am asking you to make a gift to our pledge campaign, no matter the amount. Will you?
- ▶ Newcomer: Cindy, you and your family are new to our congregation, are there any questions I can answer about why we raise money through pledges or how you can join us?

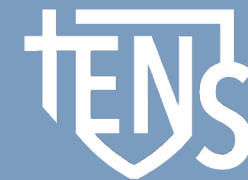
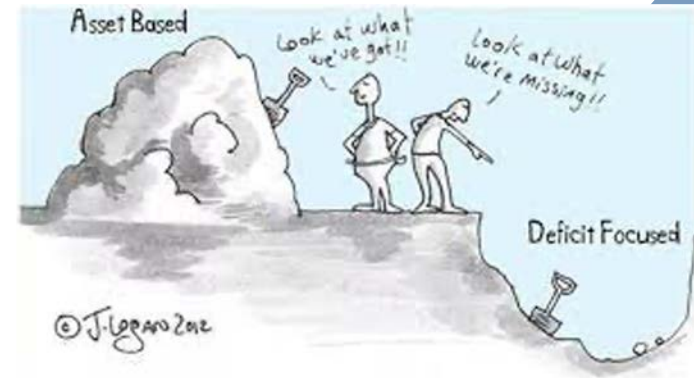
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# Appreciative Inquiry

Appreciative Inquiry is a model of design thinking or development that focuses on what is possible, what is good, what is exciting. It purposely does not ask negative questions or frame problems. It is a solutions-based, inclusive way to engage in respectful conversation. In your small-group discussions using the weekly inserts, consider asking the following appreciate inquiry questions:



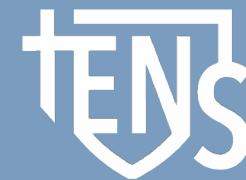
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*Confronting Challenges in Stewardship*



# Appreciative Inquiry

1. Ask the questions posed in the TENS weekly reflections – they are open-ended and “wondering”
2. What ministry of our congregation is most hopeful or most exciting to you? Why?
3. If money were no object, what service to our neighborhood / neighbors would you hope to begin? Why?
4. What are examples that you can name of nonprofits, organizations, or other churches that are doing remarkable work in our community? Why are they inspiring to you?
5. Which of your gifts are you most willing to share with our church? (some examples: music, accounting, website, answering the phone, yardwork, translation, invitation, having fun, leading groups, cooking food) Why?



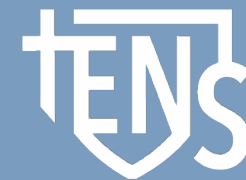
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# Challenges in Stewardship

*How to talk about money when there is economic fallout from inflation, supply chains, or other disruptions*

- ▶ There is **no shame** in a household pledging less this year than other years. Every gift matters.
- ▶ Remember, **some families are not struggling right now**, so some of your members may be able to increase their giving
- ▶ **Every conversation about pledges is a pastoral one**
- ▶ **Check in with clergy** about the people on your list, and follow up if **pastoral concerns** arise
- ▶ We remember the Great Recession in 2008-2009, the Pandemic in 2020-2021. We recovered, and we will recover again. **This too, shall pass.**
- ▶ Christians are people of Hope.
- ▶ **The work of the church is more acute in times of need**



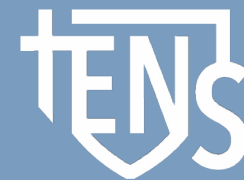
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# Challenges in Stewardship

*How to talk about stewardship if your congregation is facing budget cuts, program cuts, or staff reduction*

- ▶ Keep your conversation **focused on the mission**
  - ▶ The work of the church continues because the needs of our neighbors are still present.
  - ▶ We may have fewer resources to spend on mission, so we find other ways to do the work of God
- ▶ Does your congregation receive any assistance from the diocese or other organizations?
- ▶ There may be some members who can make extraordinary gifts to cover these unexpected shortfalls
  - **ask them**



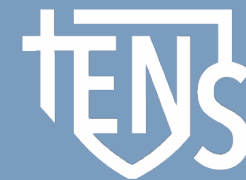
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# Challenges in Stewardship

*How to talk about stewardship in times of uncertainty*

- ▶ Our times are often uncertain, it is our **Christian hope** and our prudent planning that can help us prepare and survive this uncertainty
- ▶ **Pledges can be changed** throughout the year if circumstances change – we are open and honest
- ▶ We can also make gifts from securities or other channels which **may be performing better**
- ▶ **The most important thing is to teach that all giving matters**, regardless of the amount. Be prayerful.



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*Confronting Challenges in Stewardship*

# Recession-Proofing Your Finances

## *Financial Readiness*

- ▶ **Review budgets now:** Assess current spending. Identify non-essential expenses and consider pausing or reducing them now.
- ▶ **Build a Reserve:** Aim to set aside three to six months of operating expenses
- ▶ **Forecast Conservative Giving:** Use conservative projections for the 2025/26 pledge income and plan accordingly. This might not be the year to ask for a large increase from everyone.



## *Stewardship Resilience*



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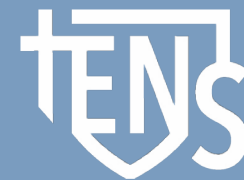
# Recession-Proofing Your Finances

## *Stewardship and Giving*

- ▶ **Strengthen Communication:** Be transparent with members about financial needs and how funds are used. This is a part of the ongoing work of transparency and accountability in the Church
- ▶ **Every Member Canvas Model:** Implement a relational stewardship campaign, encouraging all members to reflect, respond, and engage personally with the mission
- ▶ **Recurring Giving:** Encourage automated recurring donations to help stabilize cash flow



## *Stewardship Resilience*

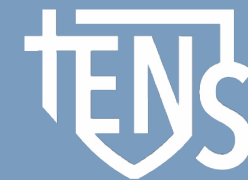
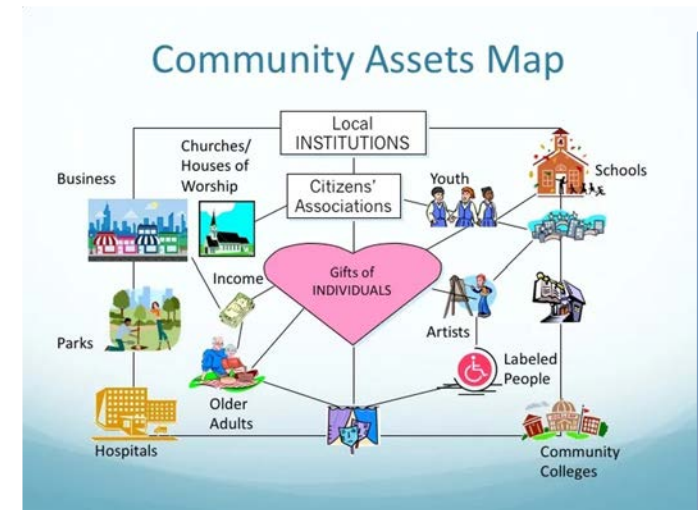


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# Recession-Proofing Your Finances

## *Mission and Community Engagement*

- ▶ **Reaffirm Mission:** Clarify and communicate the church's mission to inspire continued commitment
- ▶ **Asset-Based Community Development:** Inventory and leverage congregation and neighborhood assets to support mutual needs
- ▶ **Partnerships and Collaboration:** Form alliances with local nonprofits, businesses, and faith groups for shared resilience.



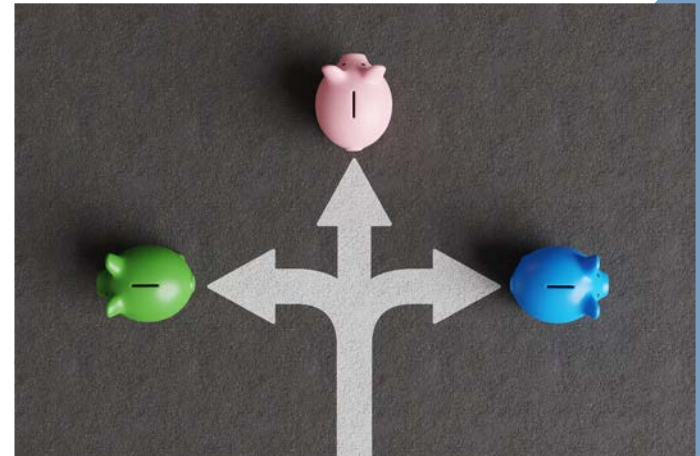
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# Recession-Proofing Your Finances

## *Income Diversification*

- ▶ **Facility Rentals:** Explore renting church facilities for events, offices, or community services
- ▶ **Creative Fundraising:** Use events, grants, social enterprise ideas to supplement income



*Stewardship Resilience*



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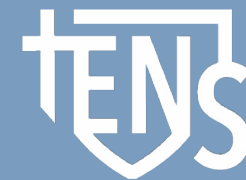


# Recession-Proofing Your Finances

*Pastoral and Lay Leadership*

- ▶ **Leader Formation:** Train vestry, stewardship teams, and ministry leaders for adaptive leadership in crisis – prepare your team now for the months ahead
- ▶ **Lay Engagement:** Involve lay members in decision-making, fundraising, and ministry planning to increase ownership and morale. Be open to town halls or community meetings, brainstorming sessions, and information sharing

*Stewardship Resilience*

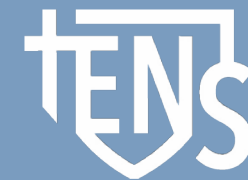


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# Recession-Proofing Your Finances

## *Monitor and Adapt*

- ▶ **Stay Informed:** Keep track of economic trends, local community needs, and diocesan resources. Keeping your eyes and ears open for new opportunities, resources, partnerships, and relationships as the situation unfolds will keep you in front of the economic chaos
- ▶ **Adjust Quarterly:** We are used to looking at our budgets once a year at the annual meeting. Perhaps during the coming months, we will have to adjust more frequently to respond to community needs (increased, likely), and giving patterns. This will keep us responsive and flexible



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*Stewardship Resilience*

# TENS Theme for 2025

What is the good news that you cannot wait to share with the world? What stories do you have that need to be told, that can help others relate to the world around them? How do you inspire generosity in others by your words, actions, and witness?

The theme of our campaign materials this year focuses on our storytelling, on the way we tell our friends and neighbors about our faith, our ministry, and our mission. What is your good news?

---

*And Mary said, "My soul magnifies the Lord,  
and my spirit rejoices in God my Savior..."* **Luke 1:46-47, NRSV**

*TENS Theme 2025*



**Tell Out**  
**My Soul**




**Proclama**  
**mi alma**



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# Pledge Campaign Tools

## Formation Tools




**Tell Out  
My Soul**

**Every Valley:  
An Advent Reflection**

Each year as the calendar turns to Advent, I find myself thumbing through my music library to pull up The Messiah. Best known for its ending movements and the rousing Hallelujah Chorus, the first movement is my favorite, and the one I begin humming to myself in early December. The prophets tell us of a great power, a person to come, who will level the field and reveal the right path. "Every valley shall be exalted," the Tenor boldly asserts!


Whether it is the Tenor stepping forward for the first solo aria, or visions of a prophet standing in a rocky, winding landscape, the effect is the same: a great work starts with a promise, with a proud proclamation, with someone to point the way. The prophet has something exciting to share with us, something so important that the barriers that stand in the way of hearing and acting on their words will melt away. There is an exchange happening here: the prophet has something to share, and we, who hear the message, have something to receive. When we do, the shock waves of those words will batter down mountains and smooth the rough edges within us.

This same transformation happens when we share our gifts with the church. Our investments of time, talent, and treasure are the natural response to having heard the words of the prophet and having been changed by their message. However you respond to the prophet, the world around you is being made ready to receive what you will share with it. And in every direction, as the chorus answers the Tenor, "The Glory of the Lord will be revealed." *101*




**Questions for Reflection:**

As you ease into Advent this year, pay attention to the tug of the prophet – what is it that you are hearing? How does it cause you to act? Does it fill you with the urge to share that good news and goodness with others?



Cn. J. Davey Gerhard serves as Executive Director of TENS: The Episcopal Network for Stewardship, and works diligently each year to make space for Advent amidst the busy December hustle.



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Included:

- ▶ Weekly and Seasonal Reflections – formation tools
- ▶ Pledge / Promise Cards
- ▶ Liturgical Resources and Offertory Practices
- ▶ Sample Letters and Thank-you letters
- ▶ Timeline
- ▶ Logos and Artwork

*All materials are in English and Spanish, and offered in pdf and MS Word*



**Tell Out  
My Soul**



**Proclama  
mi alma**



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*Using the TENS Materials*

# Other Pledge Campaign Tools

## Pre-Campaign

-4 WEEK  
DEADLINE

- ▶ Send Letter from the Clergy outlining the theme

-2 WEEK  
DEADLINE

- ▶ Send Letter from the Wardens focusing on your budget and mission.
- ▶ Make sure your donation platform website is ready to go

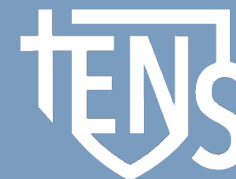
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**Tell Out**  
**My Soul**



**Proclama**  
**mi alma**



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# Other Pledge Campaign Tools

## The Campaign



- ▶ Send Letter from the Campaign Chair with Pledge Materials. Have a Kick-off event (virtual or in-person). Offer testimonials
- ▶ Pledge Cards
  - ▶ Use the model pledge / promise cards to ask for commitments from your members. **Don't forget to include information on time & talent, on legacy giving / estate gifts, gifts of securities, and online giving intentions**
- ▶ Case for Support / Brochure
- ▶ Budget
- ▶ Narrative Budget

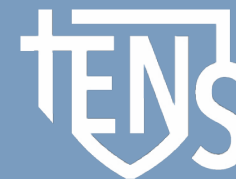
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**Tell Out**  
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**Proclama**  
**mi alma**



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# Other Pledge Campaign Tools

## The Campaign



- ▶ Distribute Weekly Inserts in the bulletin or online
- ▶ Prayers of the People are specially written to bring in the *Tell out my Soul* theme
- ▶ Blessings at the offertory, ingathering and post-communion prayer
- ▶ Small groups or rector's forum discussions of the weekly inserts
- ▶ How are you going to finish your campaign?

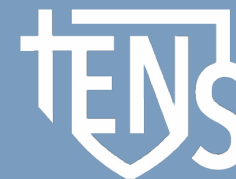
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**Proclama**  
**mi alma**



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# Other Pledge Campaign Tools

## Post-Campaign

+1 WEEK  
DEADLINE

- ▶ Send out Thank-You notes signed by the clergy and/or committee for every pledge or gift of time, talent, & treasure received

- ▶ Make sure to announce the amount pledged / collected, and a plan to clean-up gifts that haven't yet come in

- ▶ Evaluate your campaign. Watch the TENS Webinar on this topic:

<https://www.tens.org/webinars-events/tens-webinars/evaluating-your-pledge-campaign/>

- ▶ Thank your committee and acknowledge their hard work

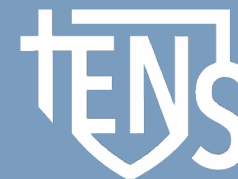
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**Tell Out  
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Thank you!

For more information, tools, webinars, and resources, visit [www.tens.org](http://www.tens.org)

Our password for 2025: Luke1:46

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