



LAKE
INSTITUTE
on Faith & Giving

*Fostering a deeper understanding of the dynamic relationship between faith and giving,
through research, education, and public conversation.*

Lake Institute on Faith & Giving



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LAKE INSTITUTE ON FAITH & GIVING
LILLY FAMILY SCHOOL OF PHILANTHROPY

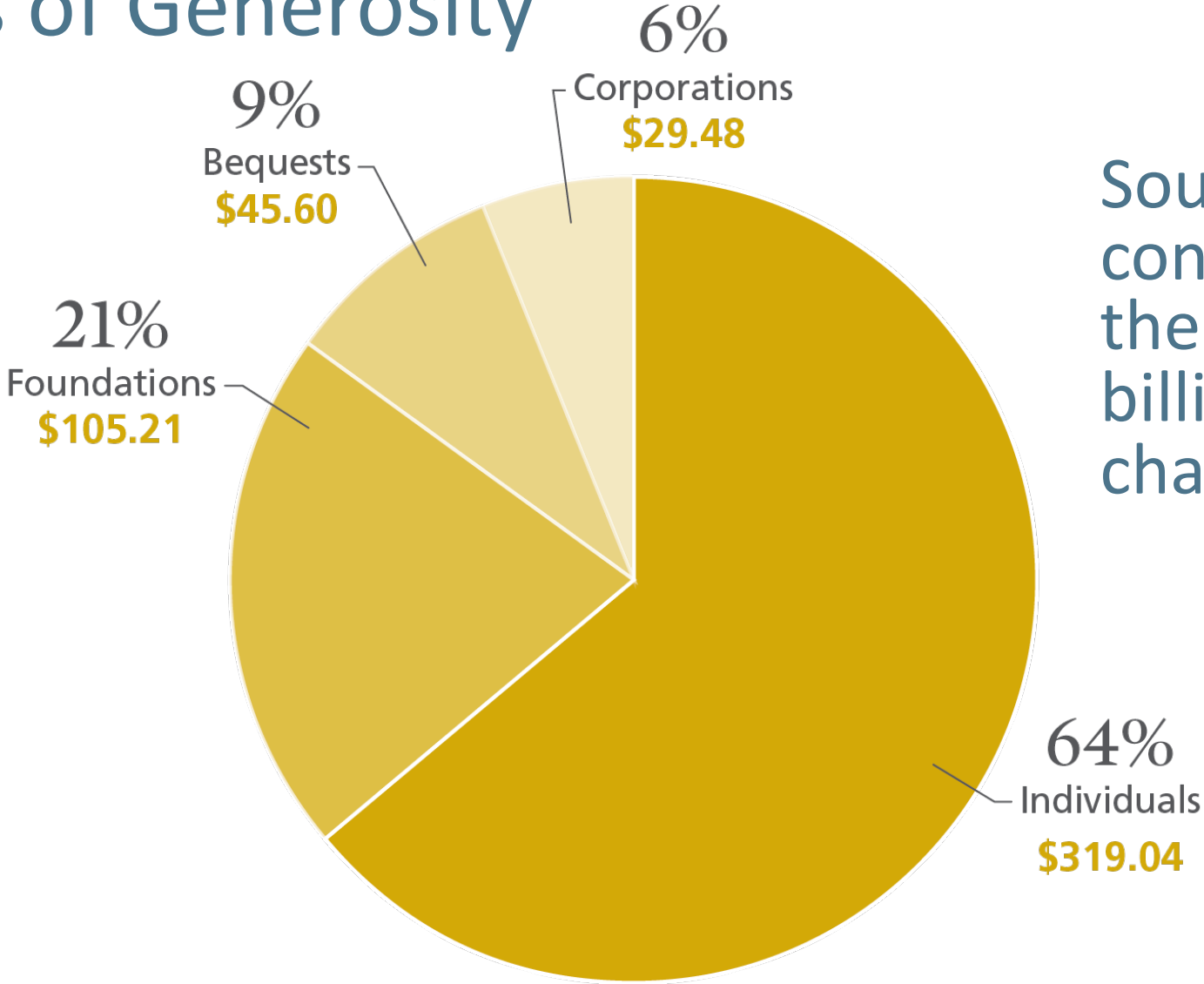




Data-Driven Practices for Engaging Your Existing and Potential Donors

Stewardship
Kaleidoscope 2023

Sources of Generosity



Sources of contributions for the \$499.33 billion given charitably in 2022.

Source: Giving USA 2023



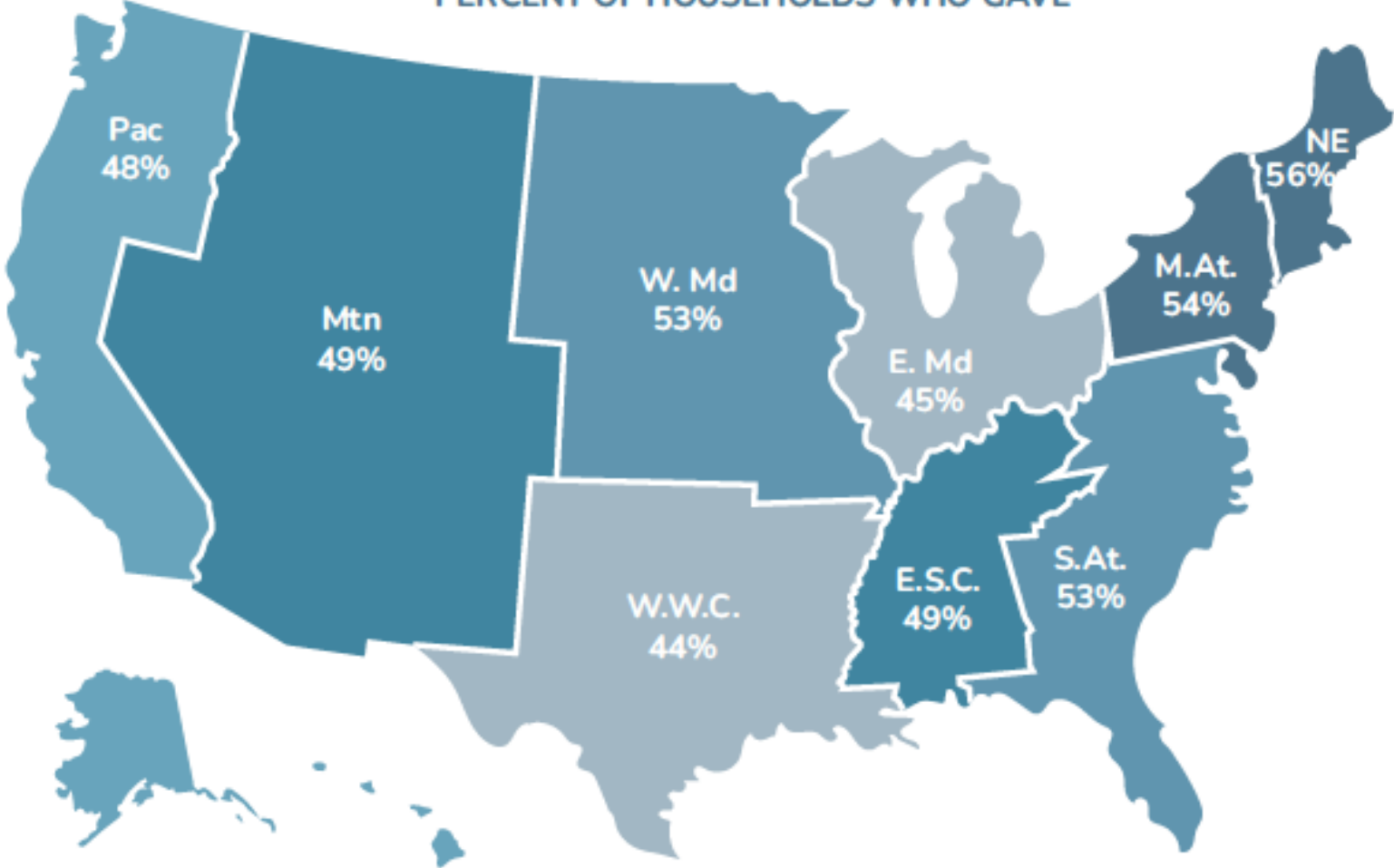
“In fundraising as ministry, we are inviting people into a new way of relating to their resources...We truly believe that **if their gift is only good for us who receive, it is not fundraising in the spiritual sense.**”

—Henri Nouwen, *A Spirituality of Fundraising*

American Generosity

50% OF US HOUSEHOLDS DONATED TO CHARITY

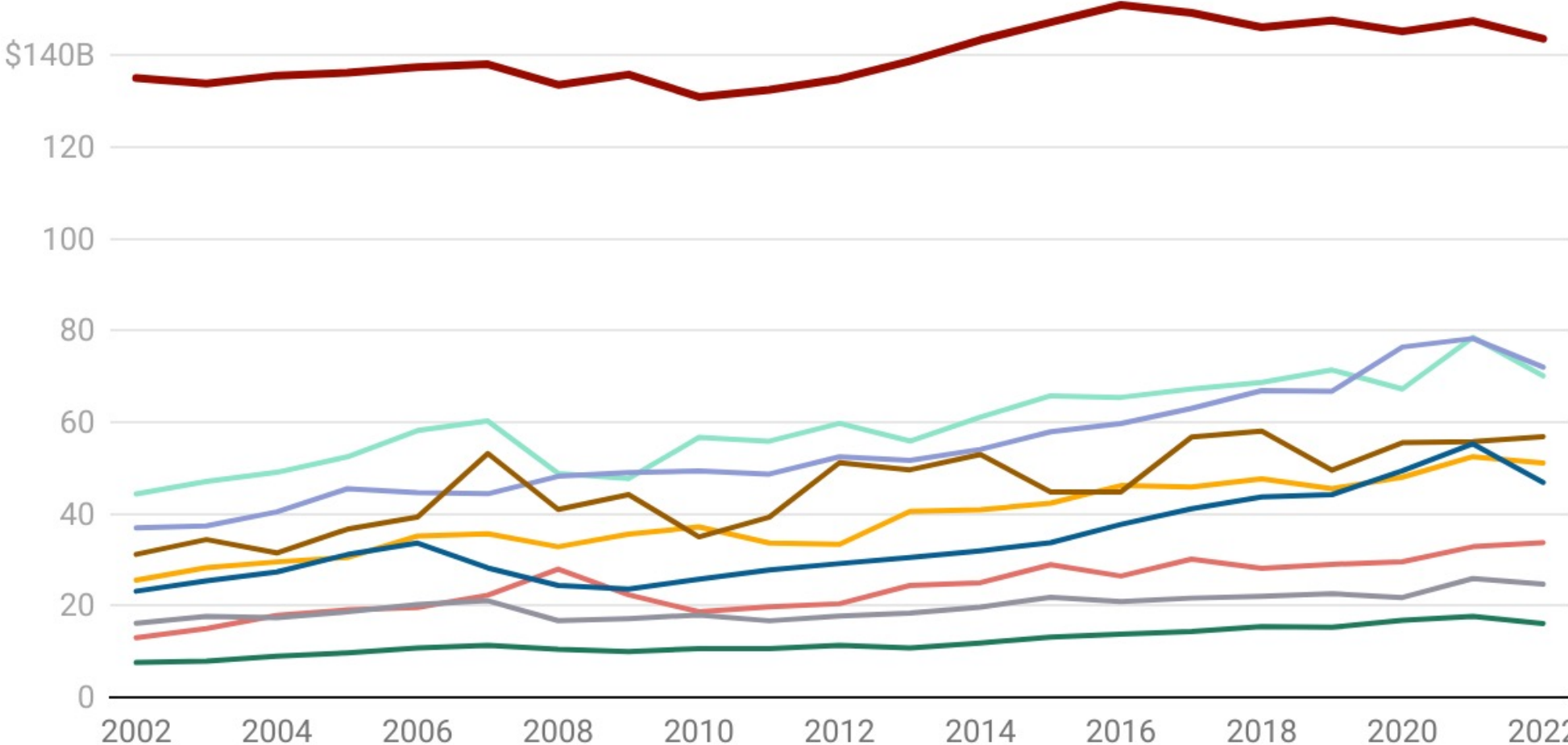
PERCENT OF HOUSEHOLDS WHO GAVE



Source: Generosity for Life, 2023

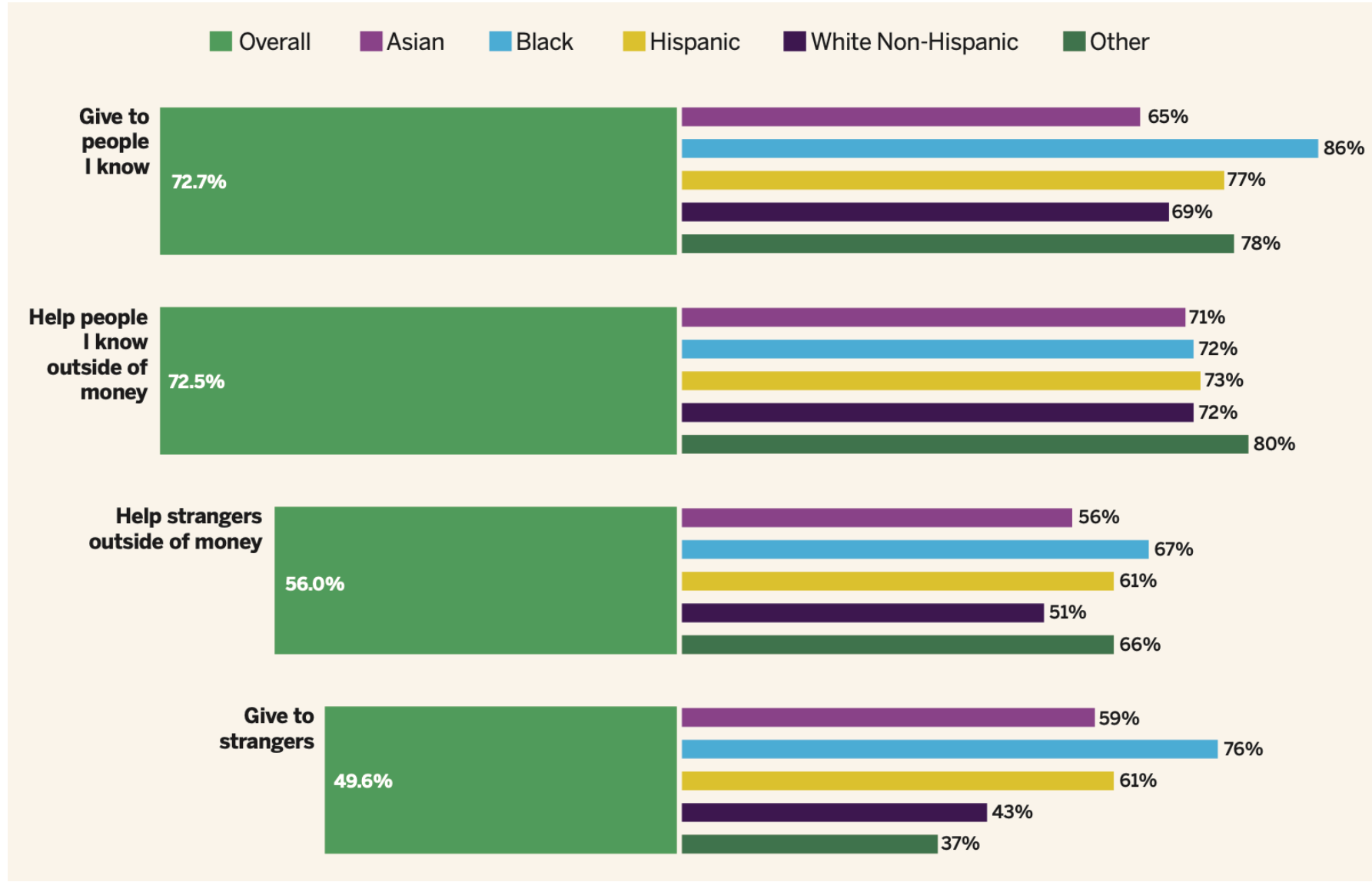
Giving to Religion

Religion Education Human services Health Public-society benefit
Arts, culture, humanities Int'l affairs Environment/animals Gifts to foundations



Source: Giving USA 2023

Mutual Aid



Source:
"Everyday
Donors of
Color" 2021



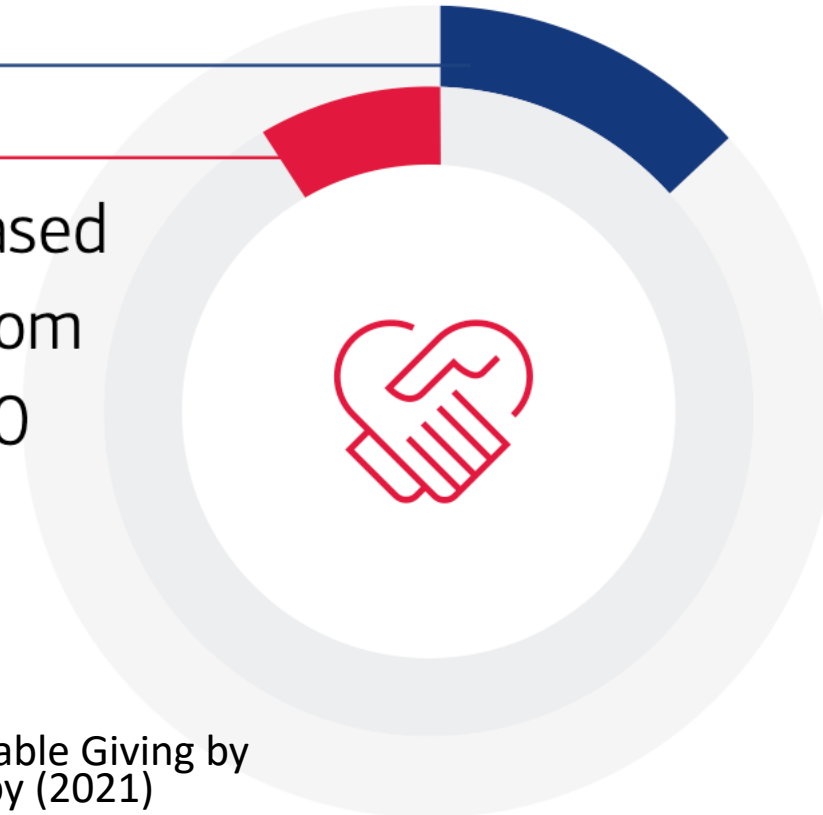
Shifting Giving Patterns

Issue-based philanthropy
from 2017 to 2020

+13%

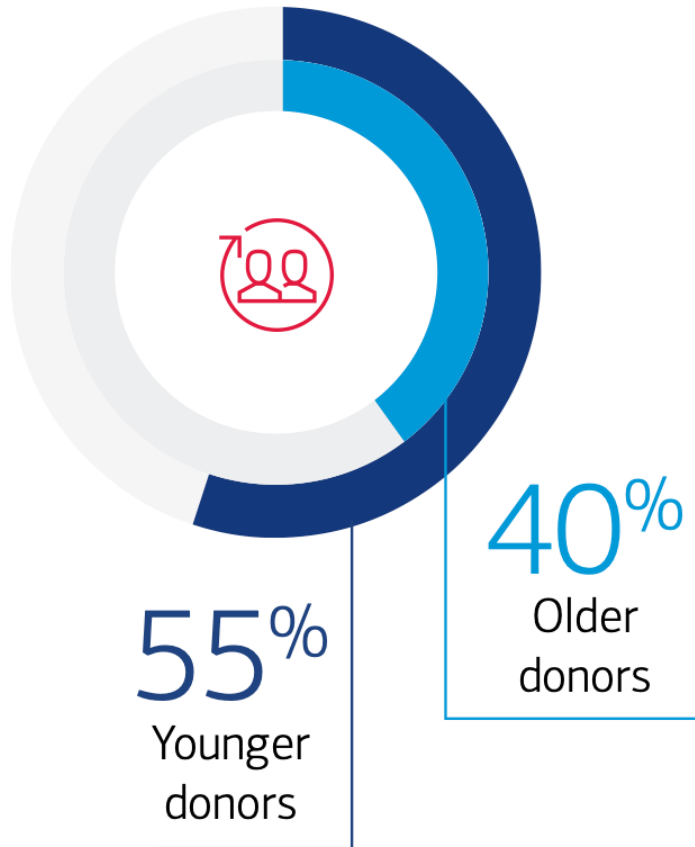
Organization-based
philanthropy from
2017 to 2020

-9%

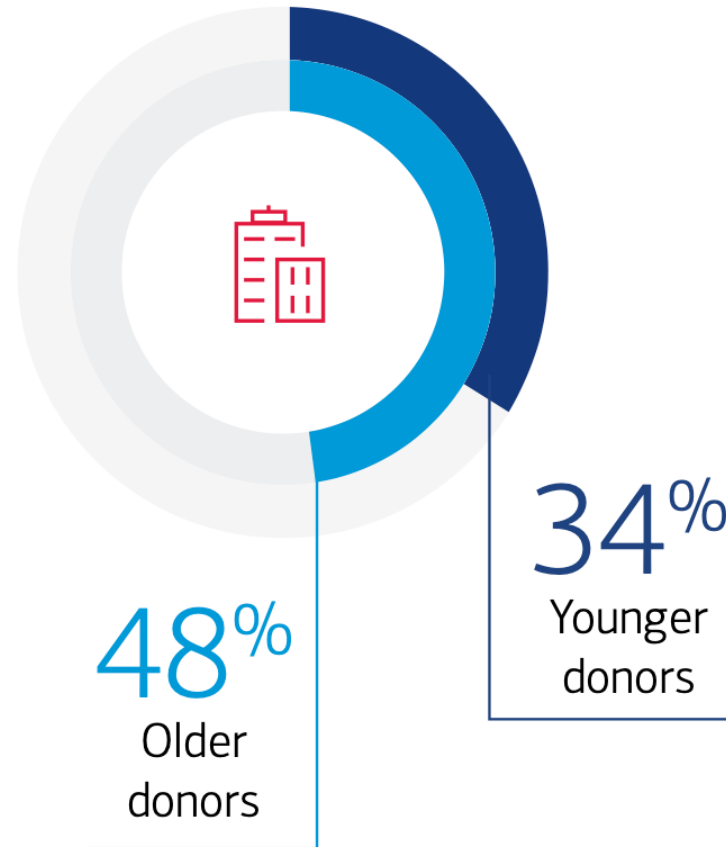


Source: Bank of America Study of Philanthropy: Charitable Giving by
Affluent Households, Lilly Family School of Philanthropy (2021)

Issue-based philanthropy



Organization-based philanthropy



Source: Bank of America Study of Philanthropy: Charitable Giving by Affluent Households, Lilly Family School of Philanthropy (2021)

The Paradigm Shift in Religious Giving

The Traditional Paradigm

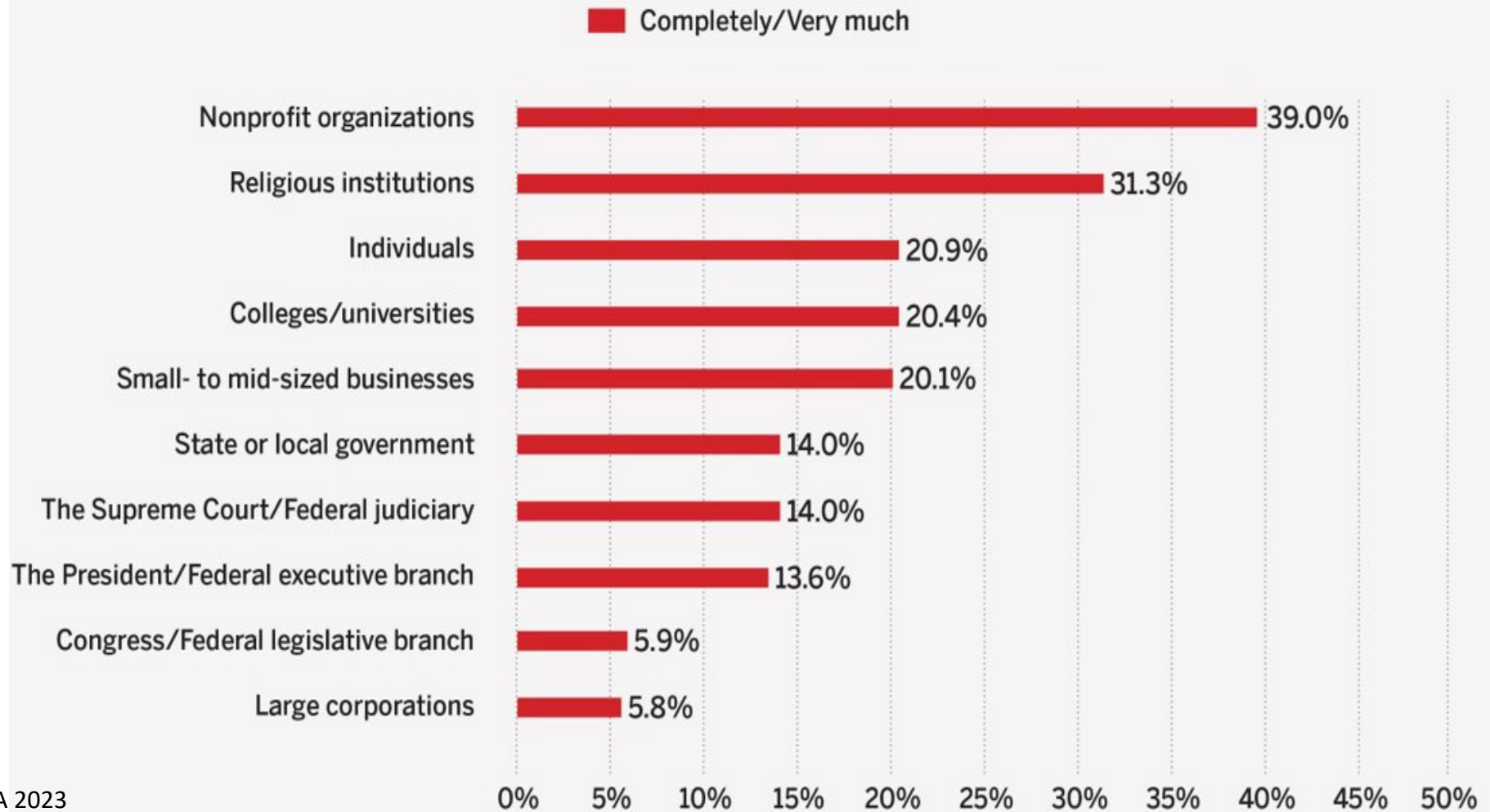
- Moral obligation
- Theology of duty
- Institutions are to be trusted
- The gift is the point
- Budgets are need-driven

The Emerging Paradigm

- Donor cultivation
- Theology of response
- Institutional trust must be earned
- Creating change is the point
- Giving is value-driven

Trust in Organizations and Institutions

How much do you trust the following entities to generally do what is right?



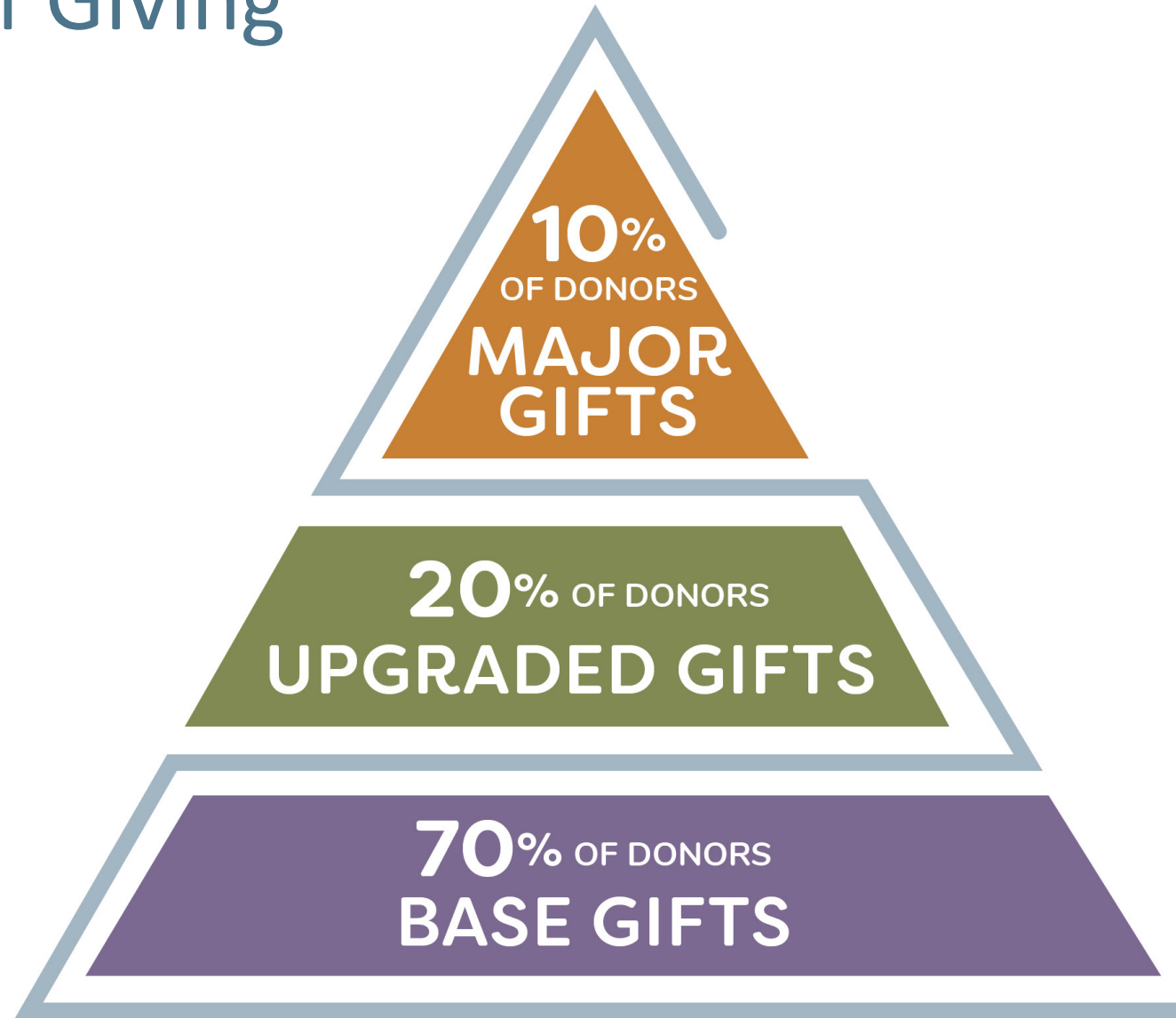
Source: Giving USA 2023



Getting to Know Your Donors

#1 Using the Data You Have

Pyramid of Giving



Pyramid of Giving

Number of gift	Amount given				
1	\$20,000	21	\$1,500		
2	\$6,000	22	\$1,200	43	\$200
3	\$6,000	23	\$1,200	44	\$200
4	\$5,000	24	\$1,200	45	\$200
5	\$5,000	25	\$1,200	46	\$200
6	\$4,500	26	\$1,000	47	\$100
7	\$4,000	27	\$1,000	48	\$100
8	\$3,000	28	\$1,000	49	\$100
9	\$3,600	29	\$700	50	\$100
10	\$3,600	30	\$600	51	\$100
11	\$3,600	31	\$600	52	\$100
12	\$3,000	32	\$600	53	\$100
13	\$2,000	33	\$500	54	\$100
14	\$2,500	34	\$500	55	\$100
15	\$2,500	35	\$500	56	\$100
16	\$2,500	36	\$400	57	\$100
17	\$2,200	37	\$400	58	\$100
18	\$2,200	38	\$300	59	\$100
19	\$2,000	39	\$250	60	\$100
20	\$1,500	40	\$250		
		41	\$250		
		42	\$250		
				Total =	\$102,300
				Average =	\$1,705
				Median =	\$600

Band	annual g	# of u	rising o	% o	strategy
ZERO-NOT YET (Anonymous)	0 & anonymous	unknown	rising	0%	Story focused social media & announcements in worship featuring outreach, kids, music. Focus on impact and importance of service and small gifts. Casual. Fun. Begin to create contact list based on attendance/involvement.
ONE	\$1-1k	180	rising	3%	Teach giving as discipleship. First time donor process for discipleship team. Giving as request for information. Use [database] for automated thank you and invite process.
TWO	\$1k-5k	115	rising	15%	Intentionally track pastor handwritten TY notes on [database] Check for omissions after Easter and late fall to make sure all have been recognized.
THREE	\$5k-10k	39	rising	16%	Invite more input and increase access to staff and information. Connect with Program staff based on areas of interest. Annual leadership meeting with Pastors to discuss vision, etc. Personal invitations to special/legacy giving workshops with Foundation. Personal christmas card from pastor.
FOUR	\$10k-100k	28	falling	43%	Invite more input and increase access to staff and information. Annual leadership meeting with Pastors to discuss vision, etc. Personal invitations to special/legacy giving workshops with Foundation. Personal christmas card from pastor. Handmade Valentines card from kids. Seek leaders for Endowment retirement fund drive to begin conversations about legacy giving. Track contact to ensure personal contact with either EP or SP twice yearly.
FIVE	\$100k+	3	steady	23%	Personal chaplain - customized giving strategies for immediate and legacy giving. Engage directly with Foundation to schedule legacy giving strategy meetings/support
ALL GIVERS					Quarterly giving statement with letter from pastor. Special gift handwritten notes. Giving videos. Worship giving moments. Easter/Christmas special appeals for Nutrition & Literacy. Invitations to special giving workshops. Monitor [database] for lapsed donor contact needs quarterly.

“Imagine two people coming into your meeting. One has a gold ring and fine clothes, while the other is poor, dressed in filthy rags. Then suppose that you were take special notice of the one wearing fine clothes...but to the poor person you say “Stand over there...”

“You do well when you really fulfill the royal law found in scripture, *Love your neighbor as yourself.*”

—Letter of James, chapter 2

“Therefore, those who need money and those who can give money meet on the common ground of God’s love...

“Whether they have much or little is not as important as the possibility of making their money available to God.”

—Henri Nouwen, *A Spirituality of Fundraising*



Getting to Know Your Donors

#2 Reaching the People You Don't Know (Yet)

The ARDA

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US RELIGION

Community Profile Builder

This tool assists church and community leaders in accessing free online information about their communities. The initial map shows the location of other churches in your area and the Community Profile Builder provides you with social, economic, and religious information on the community or neighborhoods you select.

Enter a ZIP code, city and state, or complete address and press Enter or click Create Profile button:

9750 Wellington Road, Manassas VA

Create Profile





Philanthropic Engagement

LAI Principle: Potential Donors

Linkage
Ability
Interest



LIA Principle: Existing Donors

Linkage
Involvement
Advocacy





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Resource Library

Meredith McNabb meremcna@iu.edu



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*Fostering a deeper understanding of the dynamic relationship between faith and giving,
through research, education, and public conversation.*

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