



The Practice of Religious Fundraising: Tools for Reflecting on Giving in Your Organization

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**LILLY FAMILY
SCHOOL OF PHILANTHROPY**





- **Executive Certificate in Religious Fundraising (ECRF)** is an eight-week online course with a practical application project that provides the research, tools and customized training to meet the growing needs of leaders in religious communities and fundraisers of faith-based organizations.
- **Resource Library** Curated, open-access articles and tools for congregations looking to dig deeper into the dynamic relationship between faith and giving.

www.lakeinstitute.org

Year Round Cycle of Giving



Year Round Cycle of Giving

Tell the Story

Mission & Vision Statements

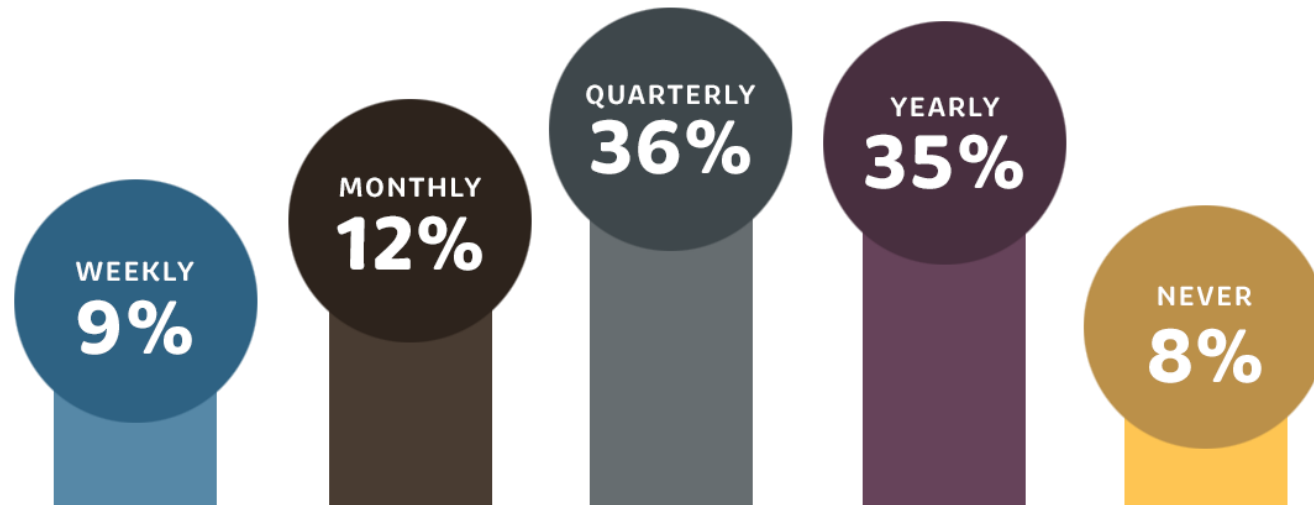
Case Statement

Celebrating the Story

Preaching & Teaching

Telling the Story..

FREQUENCY OF TEACHING ABOUT GIVING



National Study of Congregations' Economic Practices
Lake Institute 2019

Year Round Cycle of Giving

Ask

Annual Stewardship Program

Time and Talent Program

Planned Giving Program

Capital Funding Program

Special Giving Opportunities

Year-End Giving

Rhythms and Rituals of Stewardship



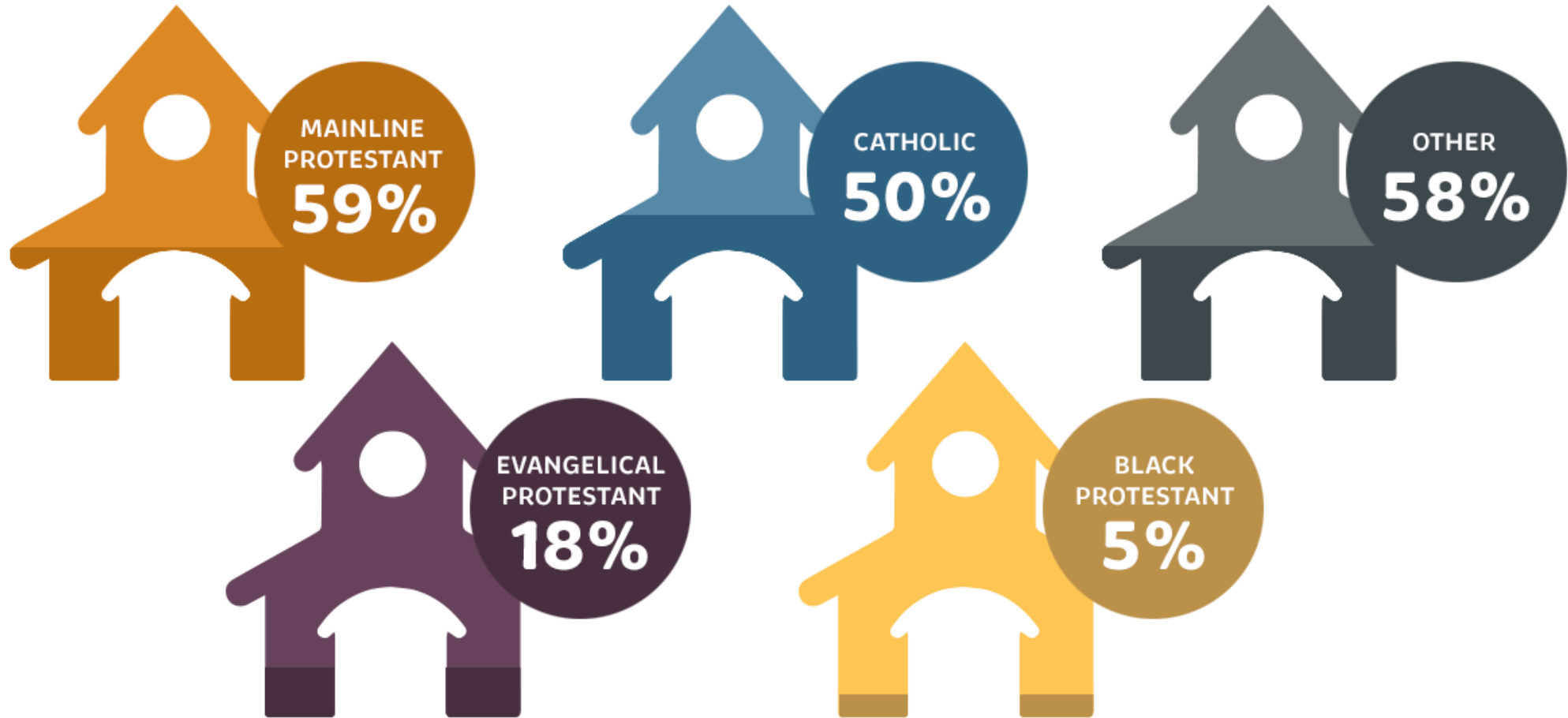
National Study of Congregations' Economic Practices
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Year Round Cycle of Giving

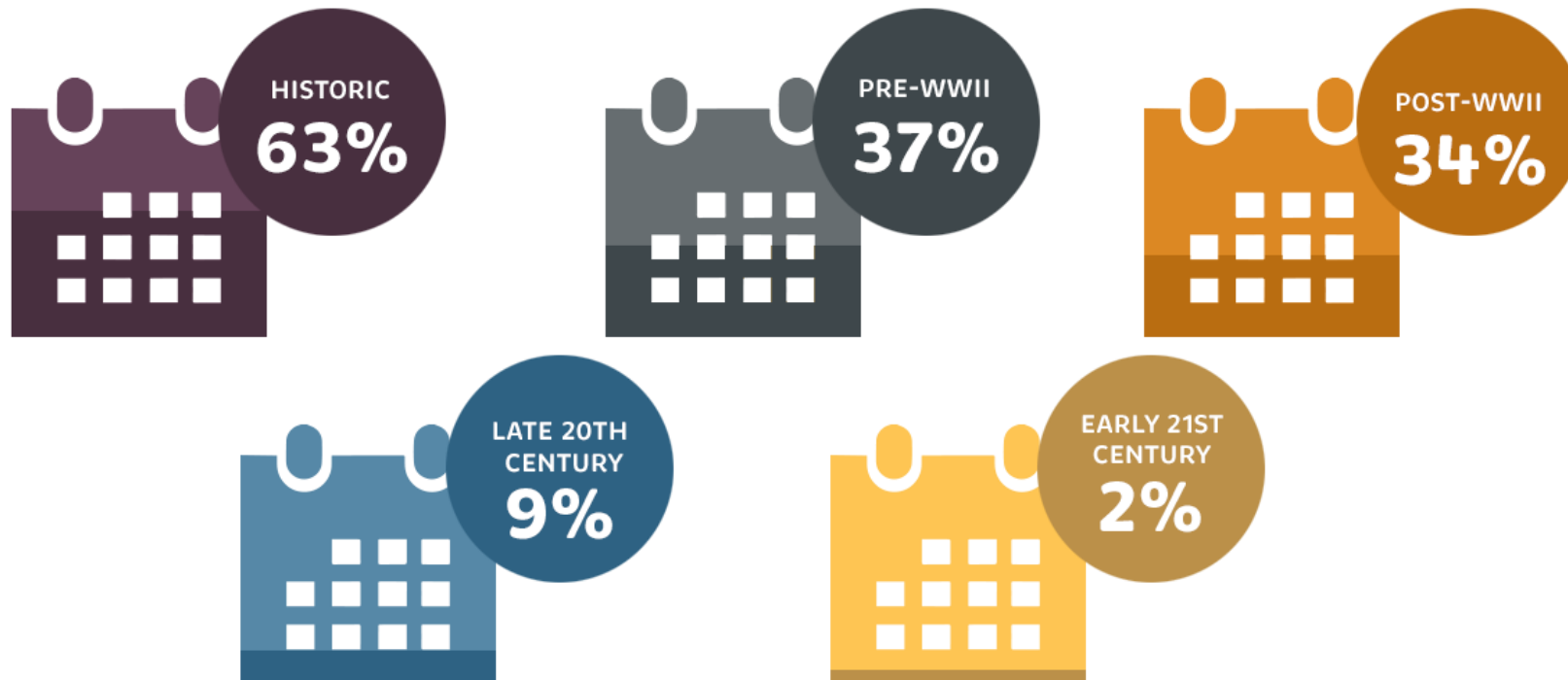
Learn & Plan

Evaluation & Analysis
Endowment Planning
Capital Needs Planning

CONGREGATIONS WITH AN ENDOWMENT



CONGREGATIONS WITH AN ENDOWMENT BY AGE OF CONGREGATION



Basic Endowment Considerations

- **Purpose:** What is this endowment meant to do in its support of the parish's/diocese's work?
- **Policies:** How will the endowment be invested? How will income be directed and *used*? How much income will be used? How will the endowment be audited?
- **Contingencies:** What if the congregation merges or closes? What if a directed gift's original purpose is no longer needed? What if there's a catastrophe?

An Endowment Can Provide...

- Fulfillment of the desires of institutionally-minded donors and long-term-legacy-minded donors
- Flexibility* to use funds where they're needed in the future
- Coverage for organizational sustainability expenses (don't call it "overhead") to focus on immediate-impact giving in the future
- The miracle of compound interest

...But Endowments Also

- May not capture the imagination of impact givers without solid (true) storytelling
- Could tie up resources where they're no longer needed
- May dull and lull the congregation's attentiveness to their purpose and growth in generosity
- Have Scarcity-Sufficiency-Abundance considerations

Year Round Cycle of Giving

Keep Momentum Going

Education & Reflection
Affirmation of Donors' Giving
Celebration of Accomplishments
and Mission

Generosity/Stewardship Calendar

Inspiring Generosity, Cesie Delve Scheuermann

Generosity/Stewardship Calendar 2024

*Have questions? Shoot me an email:
InspiringGenerosity@gmail.com or at CesieDS@horizons.net*

<i>Month</i>	<i>Activities</i>
<i>January</i>	<p>___ Report on your Christmas Eve offering and where funds went (use your pulpit, FB, email, newsletter)</p> <p>___ Set a stewardship goal for 2024. How much do you need to raise?</p> <p>___ Consider a second (soft) ask. Two (or More) Annual Pledge Campaigns? 2 More Reasons to Consider a Second Pledge Drive in the New Year</p> <p>___ Year-end giving statements prepared – with a hand-written thank you from the pastor tucked in with each statement or a signed letter highlighting how tithes have been used.</p>
<i>February</i>	<p>___ Love your congregation! Mail Valentine’s Day cards to say “thank you.” 4 Ways to Love On Your People for Valentine's Day</p> <p>___ Testimony in worship from someone talking about how your congregation has made a difference in their lives, post on FB and in your newsletter. How to Tell a Three-Minute Story During Worship</p> <p>___ Review how you do your offering: Is there a way to improve it? Make it more joyful? Easier to give? Have you added a QR Code? How about Venmo? One Way to Make the Offering Plate Less about \$\$\$. How to Make On-Line Giving a Spiritual Experience. Do you want to Venmo? 4 Things about the Generational Report from Giving USA.</p>

Year Round Cycle of Giving



Comprehensive Case for Support

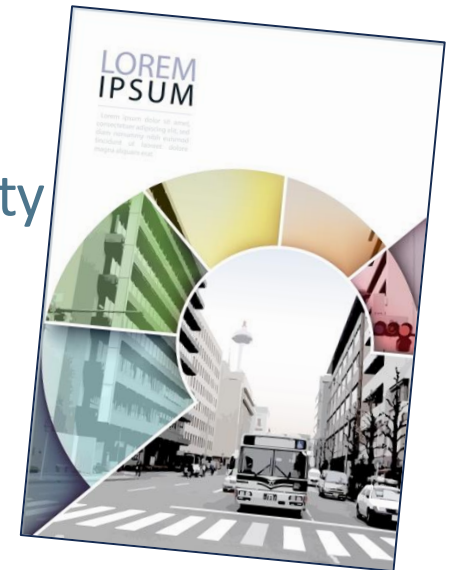
Internal Case Statement

- Board members, Staff, Volunteers
- The whole picture of what you do and how you do it
- *Organization*

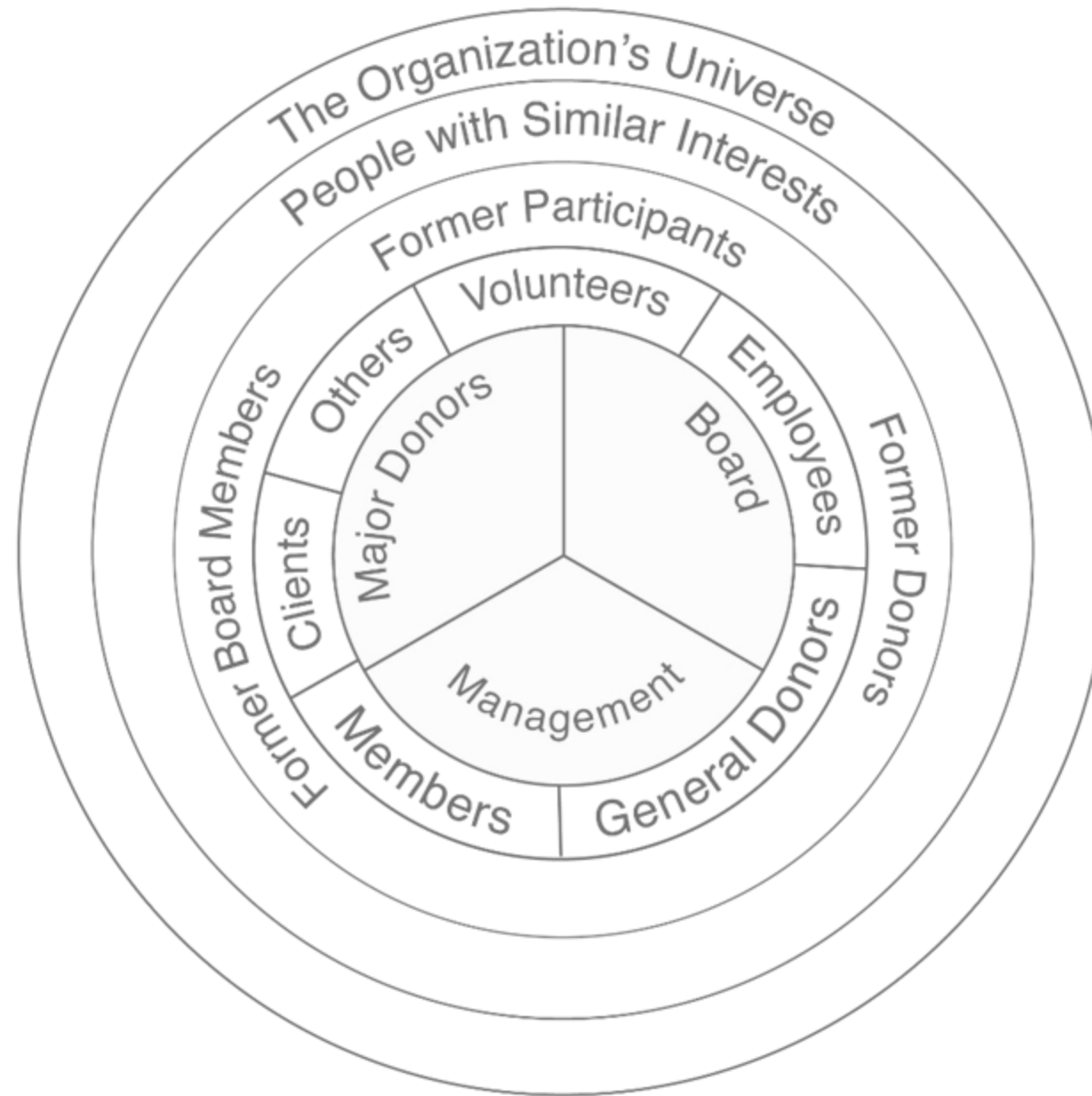


External Case Statement(s)

- Donors (Individuals, Organizations, Grantmakers)
- Tailored slice
 - Constituency
 - Giving opportunity
- *Presentation*



The Constituency Model



“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

The Constituency Model

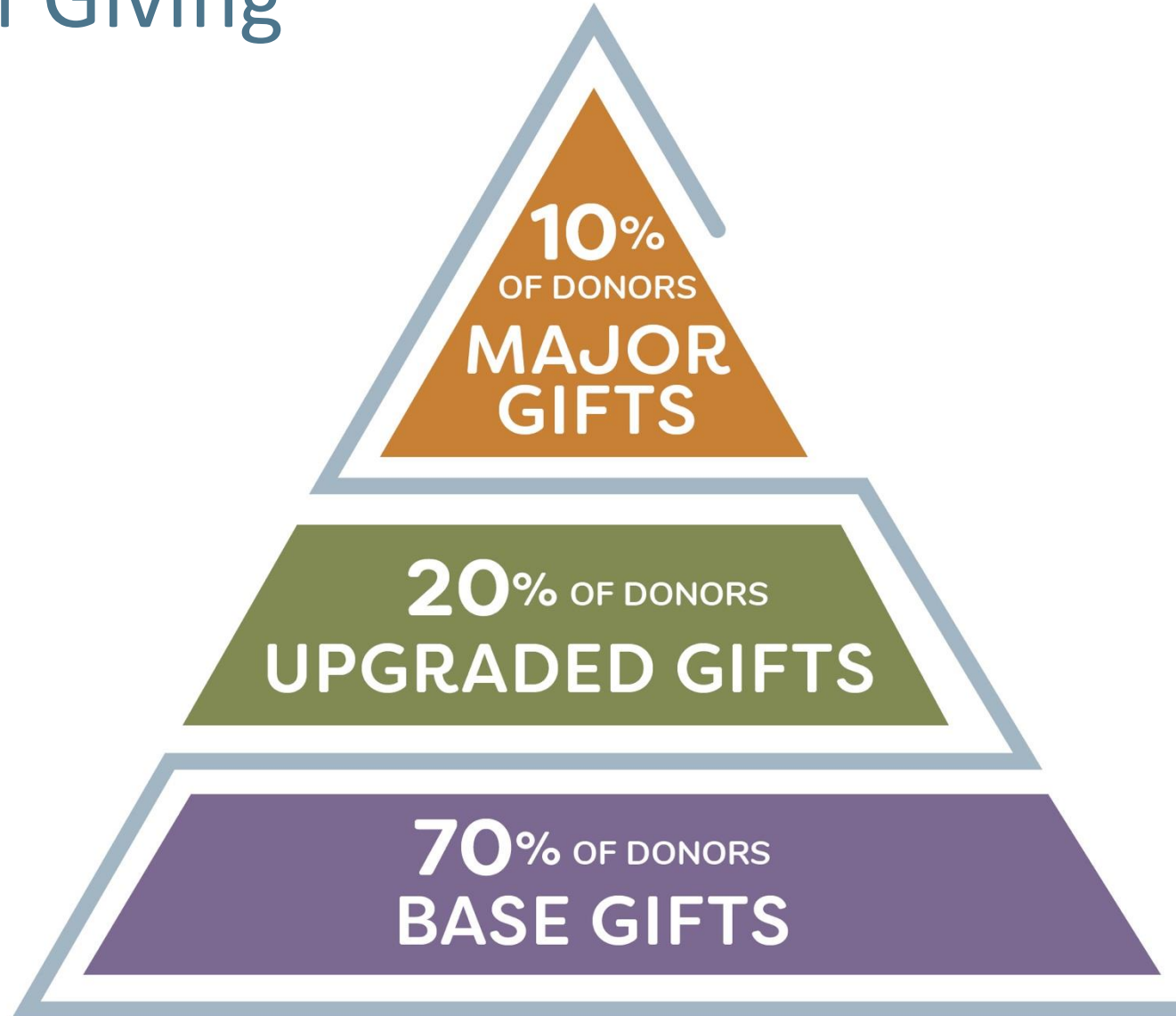
Think through who your constituencies are:

Starting at the center with those who know the most and are most essential, moving outward from there.

How might you connect differently with your different constituencies?



Pyramid of Giving

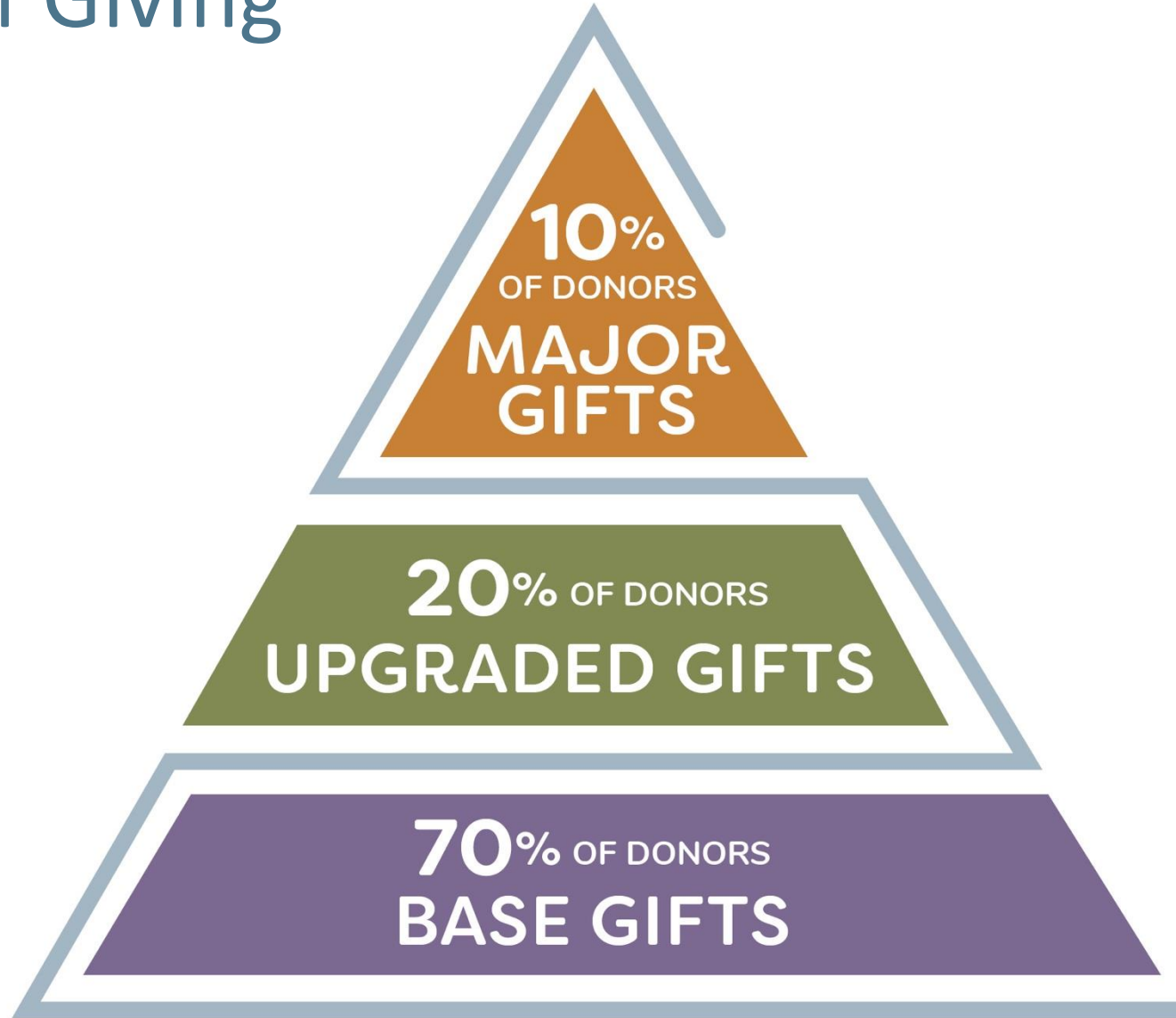


Pyramid of Giving

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

Pyramid of Giving

Descriptive
(Prescriptive)
Diagnostic



Band	annual g	# of u	rising o	% of	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 lapsted donor contact needs quarterly.

Knowledge of Individual Giving Records

55% of US congregations say their head clergyperson has *access* to individual giving records.

58% of those clergy who have access report actually looking at the giving records.

In congregations where the clergy had access and used that access, 58% had a trend of increased giving over the past three years (relative to 48% of all congregations reporting increased giving)

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



Housing Report³

These 48 block groups have a total of 26,120 housing units. The majority of homes (53.8%) are valued at \$400,000 or more. The majority of renters (60.6%) pay \$1,500-\$2,499 per month. [[View color-coded housing maps](#)]

Click to start a new report
Click to view color-coded map

Community Profile Sections:

- Religion Report
- Housing Report
- Income Report
- Employment Report
- Gender/Age Report
- Education Report
- Family Report
- Race/Ethnicity Report
- Sources

Options:

- Show Charts
- All Data
- Reduced

Housing Types	2015	2022	% Change (2015-2022)	U.S. (2022)
Single Family Houses	12,957 (48.2%)	11,545 (44.2%)	-10.9%	61.5%
Duplexes or Townhouses	6,898 (25.7%)	8,047 (30.8%)	+16.7%	6.1%
2 to 4 Units at Address	859 (3.2%)	565 (2.2%)	-34.2%	7.7%
5 to 9 Units at Address	1,046 (3.9%)	871 (3.3%)	-16.7%	4.6%
10 or More Units at Address	4,918 (18.3%)	4,947 (18.9%)	+0.6%	14.2%
Mobile Homes	211 (0.8%)	145 (0.6%)	-31.3%	5.7%
Boats, RVs, Vans	0 (0.0%)	0 (0.0%)	0%	0.1%



Where did person live, one year ago?	2015	2022	% Change (2015-2022)	U.S. (2022)
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The Generosity Checklist

1. How does your organization talk about its giving tradition or philanthropy?
2. How do your givers feel a sense of ownership for your organization?
3. How have you encouraged the giving of time, skills, ideas, networks as well as money?
4. How do you publicly celebrate your organization's giving tradition?
How do you say "thank you"?
5. How do you reach out to the next generation of givers?
6. What are some of the institutional challenges you will need to address if your organization is to become truly generous?

1. What's your favorite thing about your church?
2. If you were to become "perfectly" generous as a church, what would it look like?
3. Who else, beyond who's here today, needs to be a part of the conversation?
4. What could happen, positively, from the year round Cycle of Giving in the next six weeks? In the next six months?

“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*



Connect



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