

Unleashing Your Congregation's Generosity

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**“Insanity is doing the same thing over and over
again and expecting different results”**
...Albert Einstein

“Don’t sell the steak, sell the sizzle”
...source unknown

Before we Start

- How many of you are:
 - Canvass/stewardship committee chairs or members (current or future).
 - Treasurers or finance chairs?
 - Both?
 - Other?
- If you're a canvass/stewardship chair...are you doing it because you enjoy it or because no one else at your church will do it?
- “My time today will be well spent if ...”

Agenda

- Where we started (Horizon UUC 2001)
- Turning the canvass upside down (2002)
- Shaking it up (2004)
- Pathways Church 2007
- Lessons learned
- Your questions / My questions

Horizon UUC in Spring 2001

- Solid growth in membership 1995- 2000
- Called 2nd minister September 2000
- Positive congregational surveys

But...

- Terrible pledge drive spring 2001
- Started FY 01-02 with \$35K budget deficit

What had gone wrong?

A few things were obvious:

- Emphasis on the canvass had been declining for previous 2-3 years
- Canvass had little organization or publicity
- Were simply mailing out letters and a brochure, and hoping for the best

What to do in 2002?

- Differences of opinion – some thought that going back to a face-to-face model in 2002 would solve the problem.
- Decided to take a closer look.
- Asked for suggestions on *UU-Money*
- Several people recommended *Creating Congregations of Generous People* by Michael Durall.

What to do in 2002 (cont'd)

- Read Durall's book...it was a real "eye opener"
- Became aware that there were more problems than we realized and that we needed to make some major changes
- Also realized we had an opportunity to make a difference – not just in financial results but in the overall life of the church

Other things that we found out were wrong

- Appeal was based on budget requirements
- No appeal to commitment or generosity
- Senior Minister was detached from the canvass
- Firewall between spiritual and financial side of church activities – raising money was seen as an unpleasant chore rather than an expression of faith
- New members were not educated
 - “Nobody asked us to pledge”
 - “It costs \$125 to join”
 - People could join without attending a class (altar calls on New Member Sundays)
- Canvass chair reported to finance committee

Activities June-October 2001

- Organized committee
- Everyone on committee read Durrall's book
- Developed "working assumptions" document - presented to Board at June retreat
- Got designated as a separate committee reporting to the Council
- Full day planning retreat in September
- Presented "wish list" to ministers

Working Assumptions 2002

- At least two purposes to a pledge drive: to raise money and to encourage people to become church owners, not customers
- People share based on their perception of how the church impacts their lives, because they value UU'ism, and for other intangible reasons
- People aren't motivated by budgets, increased expenses, etc., but they do want to know in general terms where their money is going

Working Assumptions 2002 (cont'd)

- People are generous if they are asked to share and if they are reminded of what the church means to them
- People's generosity increases if they know what others are pledging – especially church leaders
- Horizon's "money culture" is minimal. It needs to be elevated, but we have to be careful to provide a positive rather than negative message

The 2002 Plan

- Face to face canvass
- Communication strategy
- Senior Minister's wish list
- 3% goal
- Kick-off event
- High donor recognition event (first time for Horizon)
- Follow-up

The Face to Face Canvass...why we did it

- We were too scared not to do it
- Wanted broad-based participation in the canvass
- Wanted personal contact among members
- Wanted to re-affirm the commitment message

The Face to Face Canvass...how we did it

- Recruited canvassers based on commitment and ability to communicate, not pledge levels
- Matched people based on geography or affinity, not pledge amounts
- Pledge cards in sealed envelopes - canvassers did not know past year or current pledge. Enabled members who lost jobs to take part
- Training: share your “Horizon Stories”
- No budget or finance training. Provided finance committee hotline for canvassers on Canvass Sunday (nobody called)

Senior Minister's Wish List

(Bringing the Mountain to Mohammed)

- Promote the idea of a canvass as a time for spiritual growth, reflection of values, bonding and joy through sharing; not as an unpleasant chore we have to do to pay the bills
- Let people know that they are appreciated for their financial support as well as for their work in the church *(agreed to host the high donor recognition)*
- Three-minute testimonials during Sunday services for 4 weeks up to Canvass Sunday. Schedule near "Joys and Sorrows" *(Balked at first but was OK when we assured him we wouldn't talk money during the service)*

Senior Minister's Wish List (cont'd)

- Both ministers co-lead Canvass Sunday service *(did this)*
- Personally sign solicitation and acknowledgement letters *(didn't sign acknowledgement letters)*
- Disclose own pledge (% or actual amount) to promote openness about giving and lead by example *(did this...and it was a big step)*

Communication (newsletter)

- November “*Caring, Commitment Canvass*” introduced the committee and the campaign
- December “*Canvassers Needed*” - allegedly to recruit volunteers but really to introduce the idea of a “feel good” face to face canvass
- January “*This Column Brought to You by the Letter ‘M’*” use of money to express our religious values
- February “*Does your Checkbook Reflect your Values?*” and “*Canvass Q&A*”
- March “*A Church...a Family*” and more “*Canvass Q&A*”

Communication (other)

- Inserts in the Order of Service - four Sundays
 - Quotes from members including children and youth.
 - *I support Horizon because...*
 - *Horizon has changed my life by...*
 - *I am a UU because...*
- Testimonials during the service
- Several informational emails
- Flyers and posters around church
- Pledge letter with bookmark (10 reasons to support Horizon)
- Email and call from canvasser
- No brochure, pledge distribution graphs or sample budgets

Results

- Approximately 70% of members visited at home or Starbucks
- \$296K by end of campaign vs. \$231K previous year
- Overall positive feedback for face to face canvass

2004 – a Different Model

- Had done face to face canvass in 2002 and 2003
- More difficult to recruit canvassers in 2003 than 2002 (somewhat surprising considering the positive feedback in 2002)
- \$14,000 reduction in 2003
- Michael Durall wrote *Beyond the Collection Plate* in 2003 – further insight on how churches promote or limit growth and financial health
- Durall came to Horizon in October 2003 as part of “church revitalization” effort – recommendations included community outreach as a way to grow and strengthen the church

2004 Canvass plan

- Incorporate community outreach projects into canvass
- Ask board for outreach line item in budget
- Ask board for personal pledge commitment
- Communication strategy same as 2002 & 2003
- Set goal at 5% of net income

Board Pledge Commitment

- Blind survey protected individual confidentiality
- Each board member wrote on a piece of paper the percent of income he/she intended to pledge
- Results published in newsletter: average was 5.2%

P² – Projects and Pledges

- Idea - motivate members to share within the church by sharing with the community
- Organized projects with 14 agencies: Red Cross, Camp Summit, Friends of the Family, Peditplace, Metrocrest Social Service Center and others.
- All scheduled for Saturday before Canvass Sunday
- Projects were typically ½ day for 5-20 people (adults or teens)
- About 120 people participated
- Simple dinner at church that evening - each project team shared their stories
- Collected pledges at dinner or at lunch on Canvass Sunday

Results

- Increased from \$282K to \$307K
- Number of pledges declined – from 192 to 164
- Average pledge increased from \$1,476 to \$1,877 (skewed by two new pledges of \$10,000 each)
- Very positive feedback on P². “More meaningful than canvass visits”
- Took longer to get the pledges in than in years when we had face to face canvasses

Pathways Church – a Brief History

- Started in 2003 as a UUA experiment in church-planting
- Started with three ministers and an executive director
- UUA pulled support late 2005, a year earlier than expected. Had to lay off two ministers and executive director. Congregation was determined to stay together.
- Amazing stewardship campaign in Spring 2006. Average pledge was \$2,900, median was \$2,400
- Moved to new rental space in June 2006 (had been holding services in middle school cafeteria)

Pathways 2007 Stewardship Campaign

- Plan:
 - Board commitment on pledge percent of income
 - Outreach projects (similar to P²)
 - “Celebration Sunday” model
- Concerned that 2006 results were result of financial crisis, and that we would have trouble repeating in 2007

We Got our Crisis for 2007...

- Rev. David announces he will leave Pathways end of June
- Announcement comes a month before Stewardship Sunday (I was notified ten days earlier but couldn't tell my committee)
- Went back to *UU-Money* to ask for advice and encouragement

UU-Money Responses

- “Tell them the truth... tell it earlier rather than later.... and remind them that there may be no time in the history of your congregation that it would be more important than now to insure financial stability and strong congregational support”
- “I suggest that you acknowledge the admiration and appreciation you have for your departing minister and send him off with your warm support and wish him well in his new ministry. The implication here is that of a developing ministerial career. If that is so, your congregation can enjoy having been an effective part of that”
- “If the minister is leaving on good terms, the canvass is a chance to kick off the search process for someone who will be just as admired and respected”
- “The church is not the minister, after all, and perhaps your letter can address the shared ministry of your congregation and the need to continue to support that ministry with pledges”

Pathways 2007 (cont'd)

- Re-wrote pledge letter, acknowledging grief over Rev. David's leaving, and framing the Stewardship Campaign as the start of Pathways "next stage". Sent a week later than planned.
- Rev. David gone the two Sundays preceding Stewardship Sunday
- Rev. Susan Smith, District Executive, preaches week before Stewardship Sunday

Results

- Fifty-five people took part in outreach projects
- Got 80% of pledges at Stewardship Sunday service. Remaining pledges within 10 days
- Total pledged dollars slightly higher than 2006
- Average pledge was \$2,260. Median was \$1,560. Not bad, but well below previous year.

Analysis

- Lost \$24,000 from two moves and two resignations (both resignations happened before Rev. David's announcement).
- Thirty increases 9 decreases and 9 same level.
- Major gap between members joining after June 2006 and "older" members. Average pledge for newer members was \$1,028 vs. \$2,888 for older members.



Lessons Learned

Key Ingredients of any Canvass (Regardless of Model)

- Pledge leadership by example (minister and/or board). “Fair Share” giving guides are meaningless without this.
- Compelling, uplifting message of commitment, spirit and generosity
- Communication, Communication and Communication. Paper the church.
- High energy and involvement
- Congregation-wide event or kickoff

Face to Face Canvass

“Do not be trapped into thinking that significant gifts will be received in any other manner than a visit to the home”

*The Green Book: a Canvass Manual
for Unitarian Universalist
Congregations (1985)*

“Do not be trapped into believing the above statement”

Marty Wertheim (2007)

Face to Face Canvass (cont'd)

- Horizon's best years were 2004 and 2007 – without a face to face canvass (visited high donors in 2007)
- Third and fourth best were 2002 and 2003 – with face to face canvasses
- First Jefferson switched to Celebration Sunday model in 2007 – 28% increase
- Conducting a face to face canvass –
 - Forces you to get organized
 - Forces you to communicate
 - Forces you to get a a lot of people involved
- *But you should be doing all these things regardless of which model you choose*

Face to Face Canvass (cont'd)

- Other advantages of face to face canvass
 - Gets more people involved - about 1/3 of your pledge units need to be canvassers
 - Act of recruiting canvassers generates publicity for the pledge drive
 - Gets people talking to each other and creates new relationships
- Don't believe it results in larger pledges
- Lots of work – especially in larger churches

The Budget – Chicken or Egg?

- Do the canvass first, then do the budget
- When canvass goals are based on the budget
 - It fosters a mind-set of scarcity rather than abundance (most church budgets are bare bones)
 - Inspiration is replaced by anxiety
 - No motivation for “break-through” increases
- But...make sure your new member orientation includes Church Finances 101

If You Don't Have a Budget, How do You Set the Goal?

From Pathways April 2007 newsletter:

“Has a goal been set for the Stewardship Campaign?”

“Yes. The goal is for all of us to:

- Feel a renewed commitment to Pathways and our Unitarian Universalist faith
- Believe that our pledge strengthens our relationship with Pathways, with each other, and with our community
- View generosity and sharing as a fundamental part of our DNA and our Unitarian Universalist principles”

Elevating your Money Culture

- You can't do it overnight
- Sermons throughout the year stressing generosity – not just on “Canvass Sunday”
- Disclosure of pledges – minister, board members, canvass chair, anybody else that's willing
- Article on money-talk in the newsletter – discuss reasons for money anxiety, how money can be used to promote our principles.
- Special collections throughout the year for specific causes

Elevating Your Money Culture (cont'd)

- Avoid songs/skits that create anxiety
- Minister should have access to pledge data
- Canvass chair should screen board candidates (not to limit board positions to the highest pledgers, but rather to avoid blatant misers)
- Thank you letters that confirm pledge amounts – signed by president, vice president, canvass chair, minister, ...
- Expect some complaints – but don't worry about them

Recruiting your Committee

- First, get clear on your own vision of what the canvass should be
- Next, identify candidates and communicate your vision and enthusiasm to them
- Select candidates based on commitment to the church and needed skill sets. Don't worry about how much they've pledged or whether they've had fundraising experience
- Look for future leaders, future board members (canvass committees provide leadership training)

Lessons Learned (cont'd)

- Make sure your high-level donors know that they are appreciated.
- Draw inspiration from individual successes as well as overall financial increases
- Get minister and worship team involved early
- Make sure prospective new members are getting educated...so important!
- Have a follow-up plan and a hard close date
- Stay in contact with your minister. You may be the first person to become aware of someone's financial difficulties or dissatisfaction with the church.

Resources

- *Creating Congregations of Generous People* by Michael Durall. Don't even think of doing another canvass without reading this book
- *The Abundance of our Faith*. Winning sermons from the UUA annual stewardship sermon contest. Read, be inspired, plagiarize
- *Beyond Fundraising* by Wayne B. Clark. Some good suggestions, especially if you're using a face-to-face model, but a little heavy on hawking UUA consulting services. Read Durall's book first. And please don't call your canvass a "budget drive".
- *UU-Money* email list. Mostly for treasurers and finance chairs, but often have some good canvass discussions and valuable advice. Go to www.uua.org/members/emaillists.

Finally...

As a stewardship/canvass chair there's only so much you can do. You can't create commitment. That's up to the other ministries in your church. You can only awaken it.

Think like a minister, not like a treasurer.

Questions?

- Your questions for me
- My questions for you
 - What other models have you found successful?
 - Do any of you have an “advance gifts” campaign? How does it work?
 - How do you recognize your top donors?
 - Does anyone (other than your minister) disclose his or her pledge amount or percent of income?