



PLEDGE & PLATE RECOVERY AND GROWTH PLAN (*BASIC*)

*Prepared for the congregations of the Episcopal Diocese
of New Jersey in response to the COVID-19 Crisis*

APRIL 2020

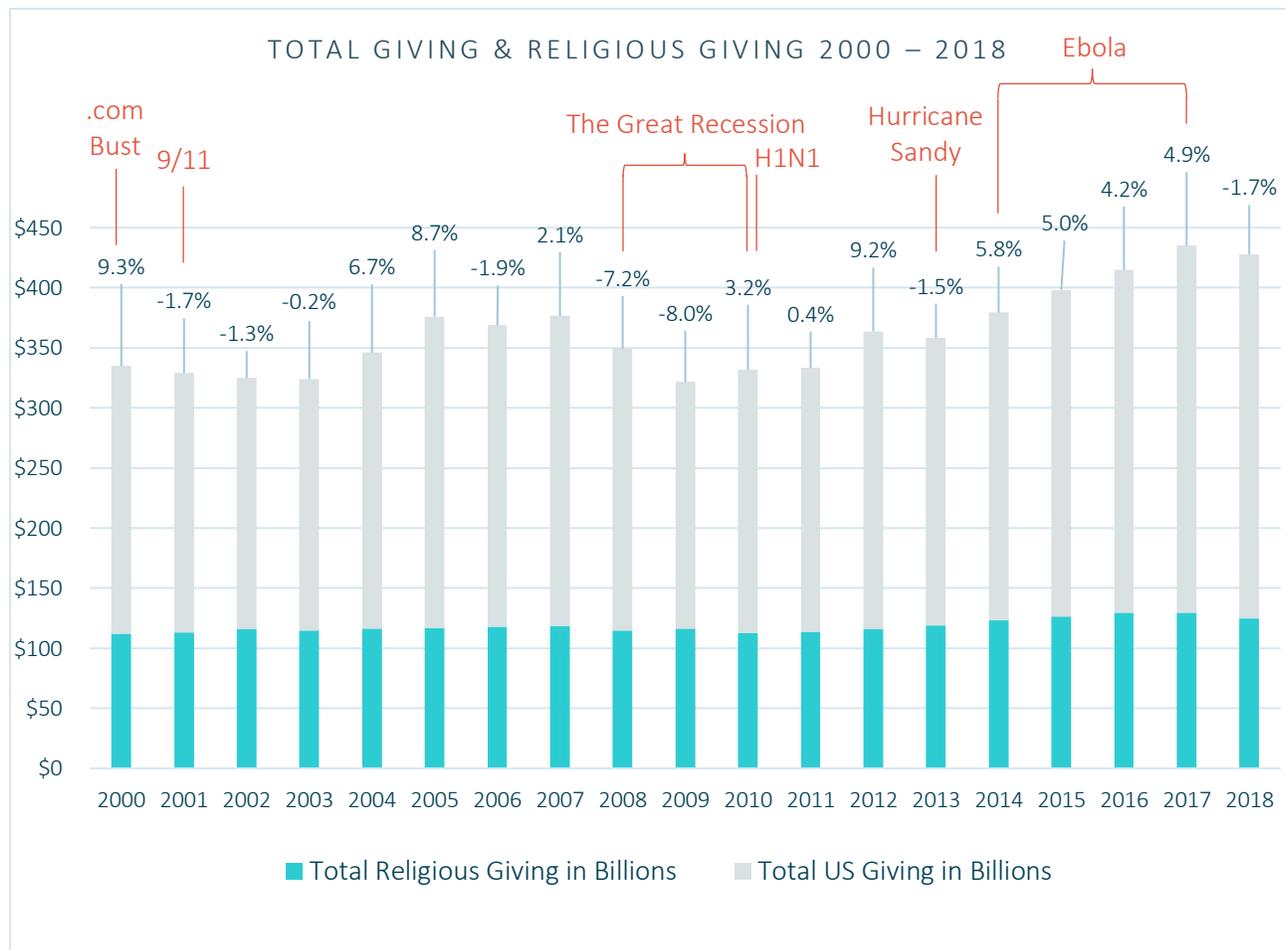


INTRODUCTION

CCS Fundraising is available to provide advice and assistance to congregations of the Episcopal Diocese of New Jersey regarding pledge and plate recovery due to the COVID-19 crisis. CCS has prepared this special fundraising guide for clergy, lay leaders, and volunteers and will be leading training seminars over the next few weeks to help congregations adapt their fundraising and move forward.

Fundraising in Challenging Times

While the implications of COVID-19 cannot be directly compared to any other recent major crisis, it is helpful to look back at how faith-based philanthropy has been impacted by other major crises.



Historically, philanthropy has been resilient, bouncing back from major crises and gaining strength. The organizations that did well coming out of these crises didn't panic or retreat into themselves but continued to engage and communicate with their constituents.

GOALS AND FUNDRAISING PRINCIPLES

The primary goals highlighted in this plan include:

1. The importance of making personal, meaningful contact with your members and friends to update them on how COVID-19 is impacting your congregation and what you are doing (and need!) to help your community get through the crisis. Being able to quantify and personalize the crisis will help put fundraising into proper perspective.
2. Finding effective ways of sharing that people are already coming forward to ask: “What does the congregation need and how can we help?” Being ready to give people who are expressing an interest and willingness to help your church everything they require to make a gift or pledge is a major goal of this plan.
3. Providing regular updates on fundraising progress and encouraging one another to reach your collective goals, as success floats all boats.
4. Ensuring members are aware of and have access to the latest giving methods in order to fulfil their pledges during this time of physical separation.

The key elements of the plan include:

- Quantifying and being able to articulate to the congregation the impact COVID-19 is having on the financial health and programs at your church.
- Organizing and using the emails and telephone numbers you have for registered families and regular members of the congregation to push out e-blasts and e-invites to virtual events and make phone calls quickly. Prioritize contact information for those who are the most loyal, active, generous, etc. in the congregation.
- Recruiting and training 5-10 volunteers per congregation to help make phone calls to as many families and members as possible, starting with those who historically have been most generous and active.
- Providing a basic script, talking points, and simple collateral to support all of the outreach and ensure everyone is delivering the same message.
- Using email and other virtual means to communicate effectively with the community.
- Ensuring as many congregations as possible have electronic giving platforms and capabilities.

Concerns about the impact of COVID-19 underscore the nonprofit sector’s vital leadership role in the welfare of our communities. Even during times of crisis, people will give if they continue to feel connected to the church, understand the impact of their support, and are asked by the right people.

Based on our 70+ years of experience working with churches and in light of the current and rapidly evolving circumstances, CCS offers the following advice:



Increase communication

Church members and supporters are interested in how their faith communities are affected by the current situation, and actions they are taking to respond. Keep them fully informed and deeply engaged at this time.



Communicate financial impact

It is important for the community to understand the weekly toll that this crisis will have on church revenue and what is required to meet the congregation's needs for the next several months.



Develop a short-term action plan

Develop a plan of action, including a communications plan over the next several weeks, featuring an outreach initiative of personal calls and emails to top givers and church members.



Consider special briefings

Consider hosting a series of teleconference briefings with members of the congregation on issues pertinent to the current situation. Givers and church members are interested in knowing how their church is responding to the current situation.



Leverage technology

Find ways to more effectively incorporate video conferencing, podcasts, or virtual briefings that make conversations more dynamic and create more personal experiences regardless of distance. Consider how social media or other virtual platforms can serve as temporary alternatives to in person gatherings.



Motivate key stakeholders

Redouble efforts to help motivate clergy, lay leaders, and staff by reminding them of the resilience of philanthropy in difficult times. Members who feel engaged and connected will continue to support their beloved church, especially in times of crisis.



Reaffirm mission and impact

Reaffirm your church's mission and continuously remind members of the impact of your work.



Share philanthropic information

Provide regular updates on progress and inspiring stories with key supporters and the community.



Show empathy and concern

We have all been impacted by COVID-19 in some way. Giving is a two-way street and the faithful want to know that they are valued and that you are concerned about their welfare. Offer any resources that might be helpful your church members.

KEY ACTIVITIES

The following activities are designed to help the Diocese’s congregations recover and grow pledge and plate offerings in an organized and methodical fashion. The key task is to ensure that your community has a clear sense of the challenges and are given specific guidance on how their support can make an immediate and critical impact.



1. Quantify impact of COVID-19

- Develop a brief statement explaining the impact COVID-19 has on the congregation’s ability to serve the community
 - Financials
 - Staff
 - Ministries and programs
- “Many are starting to ask how they can help...”



2. Identify and organize congregation contact information

- Organize the emails and telephone numbers you have for registered families and regular members of the congregation, prioritizing contact information for those who are the most loyal, active, generous, etc.
- If possible, segment the church database to identify top 10, 25, 50, 100 potential supporters for local congregation leaders to brief by telephone and approach for pace-setting gifts and pledges. Sample tiers might include:

Tier 1		Vestry members and largest givers
Tier 2		Close friends and other major givers
Tier 3		All other supporters
Tier 4		Everyone else in your database/congregation

CCS has extensive in-house expertise analyzing constituent databases for faith-based organizations. We have set aside some time for screening data from congregations in the Diocese of New Jersey to assist with the above segmenting activity. Please contact Evelyn Chen at ednj@ccsfundraising.com to express your congregation’s interest in participating.

- Confirm electronic payment methods
 - Set up Vanco or other methods of e-giving on church website and/or Facebook page
 - Be able to reference these methods in bulletins, newsletters and e-blasts as well as during live-streamed services or in videos
- Churches may want to appoint a Pledge & Plate Recovery and Growth Coordinator to assist with organizing contact information, distributing information, and setting up electronic payment methods for the congregation. *(see Appendix for a more detailed description of this role)*



3. Initiate engagement strategy

- Recruit and train 5-10 volunteers to reach out to top givers and other congregation members at least once or twice over the next few weeks.
- Invite volunteers to join Diocesan-wide weekly training sessions on engaging potential givers and other topics.
- Personalize and localize talking points and the script for phone calls.
- Distribute weekly update email to the whole congregation that informs and inspires and helps pave the way for volunteers to make their calls.

Additional ways to engage your congregation:

- Live-stream services
- 30-, 60-second video updates from local clergy or another leader in the congregation
- Virtual town halls and community engagement opportunities (prayer groups, etc.) from leadership

The Diocese can assist in producing some of the above content the churches can share with their community and in hosting online gathering opportunities from which congregations can benefit.

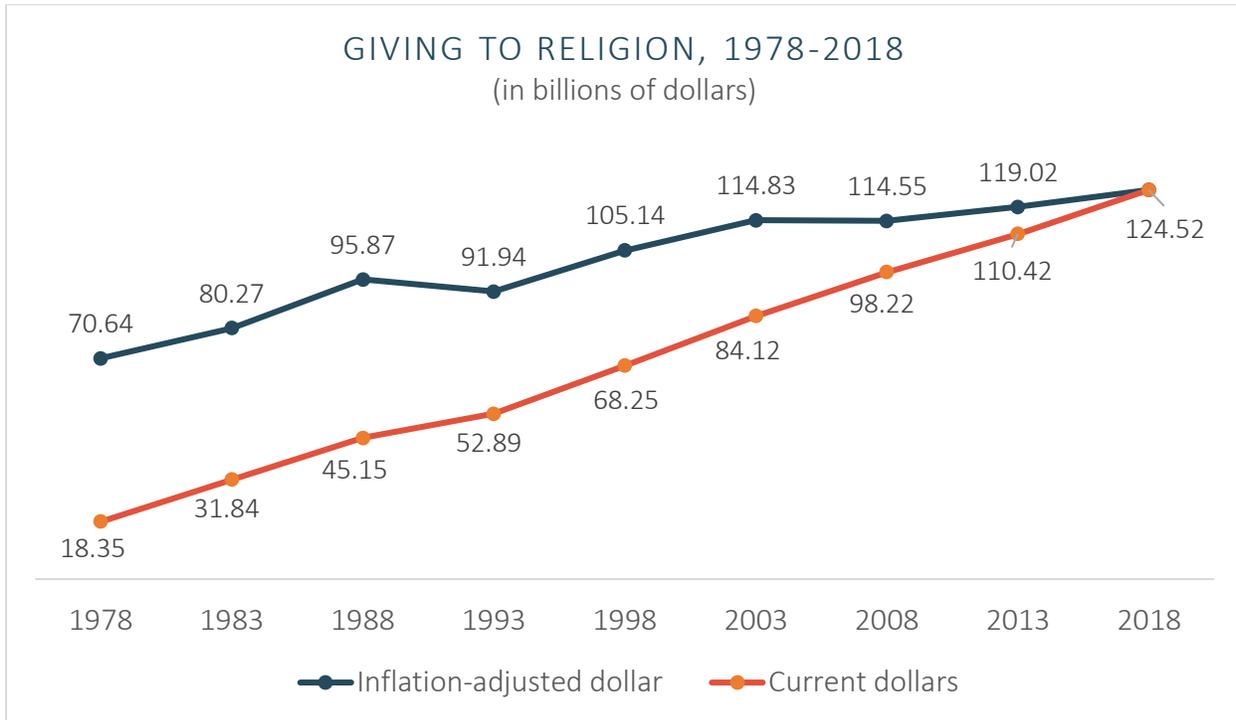


4. Celebrate successes and keep volunteers motivated

- Generate regular emails for volunteers providing updates, ongoing training opportunities, and ongoing assignment of calls to keep volunteers and members alike informed and motivated.
- Conduct regular report meetings gathering volunteers together for an internal update where they can share their stories and successes and be rejuvenated in their work.

THE PHILANTHROPIC LANDSCAPE

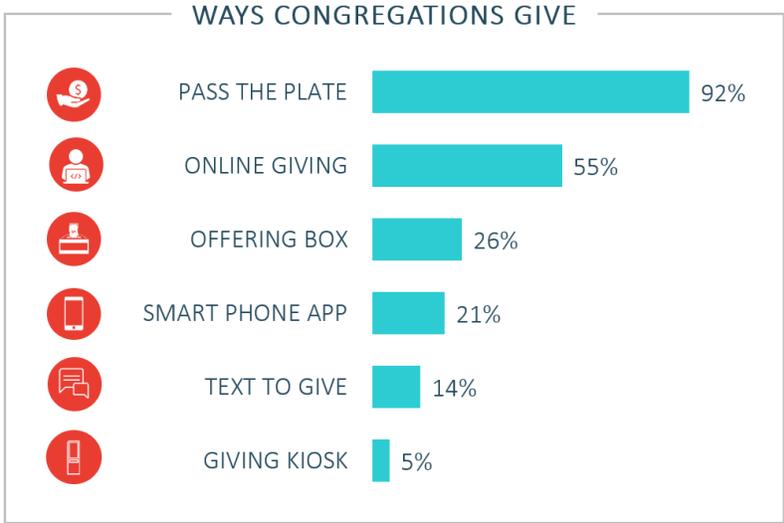
In 2018, Americans gave \$427.71 billion to charitable causes. Although giving to religion declined from the previous year, religious organizations continue to receive the largest share (29%) of charitable dollars (\$124.52 billion).



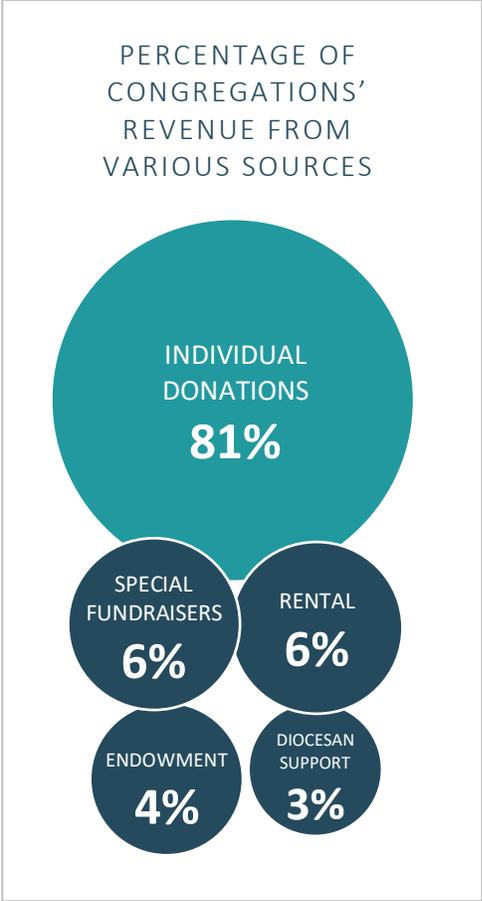
The Episcopal Church, specifically, saw a decline in the total number of congregations (-0.4%) and average attendance (-2.4%) but an increase in total contributions (1.7%) due to a substantial increase in “average pledge” (3.5%) in 2017 as compared with 2016.

Giving by individuals continues to make up the largest portion of overall giving (68%), and individual contributions make up even larger percentages of giving to congregations than nonprofits overall (81%). The vast majority of those funds are given during a worship service (78%). While congregations make a variety of giving options available, almost all congregations “pass the plate.” The vast majority (92%) of congregations collect an offering by physically passing a plate each week during religious services, and 26% of congregations have an offering or tithe-box located in the worship space.

Beyond the physical forms of contributions, many congregations provide options for participants to give digitally. Half of congregations offer electronic giving methods for one-time gifts and fulfillment of pledges in lieu of contributing to the plate during worship services. Twenty-one percent give participants the option to contribute during the worship service via mobile device app and 14% have a text-to-give option. Five percent have a giving kiosk where participants can make an electronic gift.



Online giving is growing in popularity for religious organizations, and online gifts to religious organizations were larger than average online gifts across sectors. Online giving in churches grew at more than twice the rate of overall change in online giving, and the number of times online giving has been mentioned during church services increased from 52% in 2015 to 65% in 2017. During this tumultuous time, it is increasingly important to communicate the digital giving options available to congregants.



According to the National Study of Congregations' Economic Practices (NSCEP) which tracked data from congregational budgets ranging from \$3,000 to \$41 million, the median congregation in the U.S. has annual expenses totaling roughly \$155,000. Most congregations spend almost all of what they receive annually.



Most congregations budget for mission and programming, and as a result, community programs and support provided by churches are being impacted as their overall revenue is affected by the current crisis. Eighty-four percent (84%) of congregations provide at least one type of social service to their surrounding community. The majority of congregations engaged in service projects provide food or clothing (95%), while 39% address physical health needs, and 48% provide disaster relief.

Sources: Giving USA 2019 / National Study of Congregations' Economic Practices - Lake Institute on Faith & Giving 2019