PLEDGE & PLATE RECOVERY AND GROWTH PLAN

PREPARED FOR THE CONGREGATIONS OF THE EPISCOPAL DIOCESE OF NEW JERSEY
Opening Prayer

1. The Philanthropic Landscape
2. Our COVID-19 Response to Date
3. Our Diocese – Today
4. Goals and Key Activities
5. Resources Available

Closing Prayer
The CCS Team

CHARLIE MICHAUD
Principal & Managing Director

ERIK KIERNAN
Corporate Vice President

EVELYN CHEN
Assistant Vice President
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.

Sources: Giving USA 2019
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).

Sources: Giving USA 2019
Online giving is growing in popularity for religious organizations, and online gifts to religious organizations were larger than average online gifts across sectors.

### Ways Congregations Give

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pass the Plate</td>
<td>92%</td>
</tr>
<tr>
<td>Online Giving</td>
<td>55%</td>
</tr>
<tr>
<td>Offering Box</td>
<td>26%</td>
</tr>
<tr>
<td>Smartphone App</td>
<td>21%</td>
</tr>
<tr>
<td>Text to Give</td>
<td>14%</td>
</tr>
<tr>
<td>Giving Kiosk</td>
<td>5%</td>
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</tbody>
</table>

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%).

Sources: National Study of Congregations’ Economic Practices - Lake Institute on Faith & Giving 2019
The Diocese’s COVID-19 Response To Date

✓ Dedicated COVID-19 resource section on the Diocesan website

✓ Virtual townhalls for clergy and lay leaders

✓ Online worship services and weekly online gathering opportunities for those who want to share celebrations, challenges, and resources around particular ministry areas

✓ Financial guidance
  • Weekly Financial Resourcing Focus Groups
  • Coaching and assistance in managing cash flow and applying for government assistance
  • Introduction to Vanco

✓ Establishment of Episcopal Community Services

✓ Access to experience, guidance, and coaching from CCS
140 CONGREGATIONS

Based on responses from 86 congregations

The Diocese of New Jersey - Today

How concerned are you about the impact COVID-19 will have on the financial health of the congregation over the next...

<table>
<thead>
<tr>
<th>Duration</th>
<th>Not Concerned</th>
<th>Concerned</th>
<th>Very Concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>3-6 months</td>
<td>11%</td>
<td>63%</td>
<td>26%</td>
</tr>
<tr>
<td>6-12 months</td>
<td>1%</td>
<td>58%</td>
<td>35%</td>
</tr>
</tbody>
</table>

78 churches estimated raising $4.3 million in Q2 (April-June) and believe $1.9 million (45%) to be at risk due to COVID-19.

On average, congregations allocate roughly 15% of their budget to outreach ministries and anticipate a 30% increase in demand for outreach ministry services due to COVID-19.
The Diocese of New Jersey - Today

140 CONGREGATIONS

Based on responses from 86 congregations

59% have some type of electronic giving platform (21 congregations are currently using Vanco)

54% of congregations presently without electronic giving intend on implementing it in the near future

80% are sending email blasts or newsletters

73% are sharing videos through their websites, Facebook pages, YouTube, or other channels

66% give regular social media updates

60% are live-streaming services

19% have a dedicated COVID-19 space on their websites
## Pledge & Plate Recovery and Growth Plan Goals

<table>
<thead>
<tr>
<th></th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Finding effective ways of sharing that people are already coming forward to ask: “What does the congregation need and how can we help?”</td>
</tr>
<tr>
<td>3</td>
<td>Providing regular updates on fundraising progress and encouraging one another to reach your collective goals, as success floats all boats.</td>
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<tr>
<td>4</td>
<td>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.</td>
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</tbody>
</table>
Principles of Fundraising in Times of Crisis

- Increase Communication
- Leverage Technology
- Develop a Short-Term Action Plan
- Reaffirm Mission and Impact
- Show Empathy and Concern
- Communicate Financial Impact
- Consider Special Briefings
- Motivate Key Stakeholders
- Share Philanthropic Information
Key Activities

1. Quantify impact of COVID-19

2. Identify and organize congregation contact information

3. Initiate engagement strategy

4. Celebrate successes and keep volunteers motivated
Quantify Impact of COVID-19

Develop a brief statement explaining the impact COVID-19 has on your congregation’s ability to serve the community:

• Financials
• Staff
• Ministries and programs

“Many are starting to ask how they can help...”
Identify and Organize Congregation Information

- Prioritize contact information for those who are the most loyal, active, generous, etc.
- Identify top 10, 25, 50, 100 potential supporters
- Confirm electronic payment methods
- Appoint a Pledge & Plate Recovery and Growth Coordinator

<table>
<thead>
<tr>
<th>Tier 1</th>
<th>Vestry members and largest givers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 2</td>
<td>Close friends and other major givers</td>
</tr>
<tr>
<td>Tier 3</td>
<td>All other supporters</td>
</tr>
<tr>
<td>Tier 4</td>
<td>Everyone else in your database/congregation</td>
</tr>
</tbody>
</table>

- Quantify Impact
- Organize Contacts
- Initiate Engagement
- Celebrate Successes
Initiate Engagement Strategy

• Recruit and train 5-10 volunteers to reach out to top givers and other congregation members

• Personalize and localize talking points and the script for phone calls

• Distribute weekly update email to the whole congregation

• Join these weekly trainings

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 from leadership
# Electronic Engagement Checklist

<table>
<thead>
<tr>
<th>Must Have</th>
<th>Helpful to Have</th>
<th>Have If You Can</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Website (or Facebook page)</td>
<td>- Easy-to-Access online giving portal (such as Vanco)</td>
<td>- Ability to create and deliver daily or regular video messages to congregation</td>
</tr>
<tr>
<td>- Access to congregant emails</td>
<td>- Virtual prayer group / Bible studies / Sunday School</td>
<td>- Staff member dedicated to hosting church webinars and livestreamed services and posting videos online</td>
</tr>
<tr>
<td>- Ability to generate regular e-blasts</td>
<td>- Ability to livestream services</td>
<td></td>
</tr>
<tr>
<td>- Ability to receive pledges and pledge payments electronically</td>
<td>- Ability to conduct video conferences for Vestry and ministry meetings</td>
<td>- Other social media channels</td>
</tr>
</tbody>
</table>

### QUANTIFY IMPACT

### ORGANIZE CONTACTS

### INITIATE ENGAGEMENT

### CELEBRATE SUCCESSES
Dear team, thank you for your continued efforts! As you can see from the chart below, your outreach is truly making a difference.

Last week we posted a new video to the congregation on YouTube. A special thanks to Tom and Marcia, who spoke about their experiences in the church and why they have chosen to make a special gift in support of our ministry.

Celebrate Successes and Keep Volunteers Motivated

• Generate regular emails for volunteers to keep all informed and motivated
  ✓ Updates
  ✓ Ongoing training opportunities and available resources
  ✓ Ongoing call assignments

• 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

QUANTIFY IMPACT  ORGANIZE CONTACTS  INITIATE ENGAGEMENT  CELEBRATE SUCCESSES
IMMEDIATE RESOURCES

1. Pledge & Plate Recovery and Growth Plan

2. Sample Tools and Materials
   (Pledge & Plate Recovery and Growth Plan Appendix)

3. Weekly Trainings
   (Tuesdays at 7pm / Wednesdays at 10am)

RESOURCES TO COME

1. Regular updates and lessons learned

2. Diocesan content including online messages from Bishop Stokes
QUESTIONS

Charlie Michaud, Principal & Managing Director
Erik Kiernan, Corporate Vice President
Evelyn Chen, Assistant Vice President

ednj@ccsfundraising.com
ccsfundraising.com