



PLEDGE & PLATE RECOVERY AND GROWTH PLAN

PREPARED FOR THE CONGREGATIONS OF THE EPISCOPAL DIOCESE OF NEW JERSEY

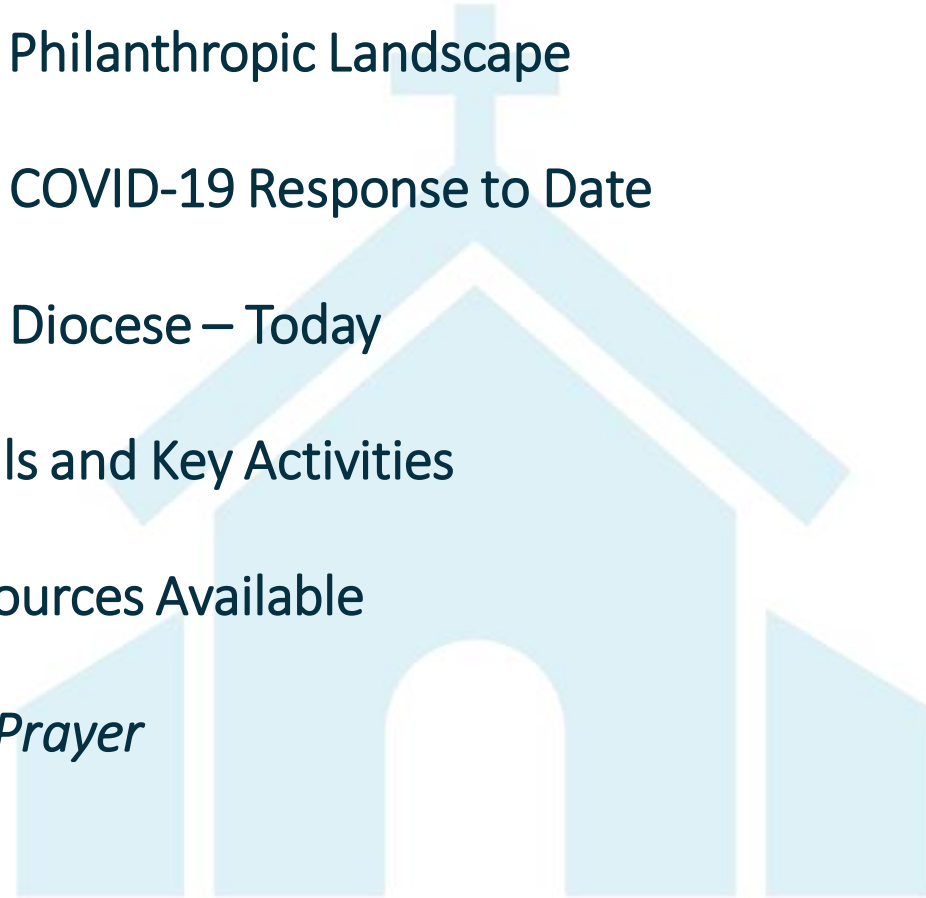


Agenda

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

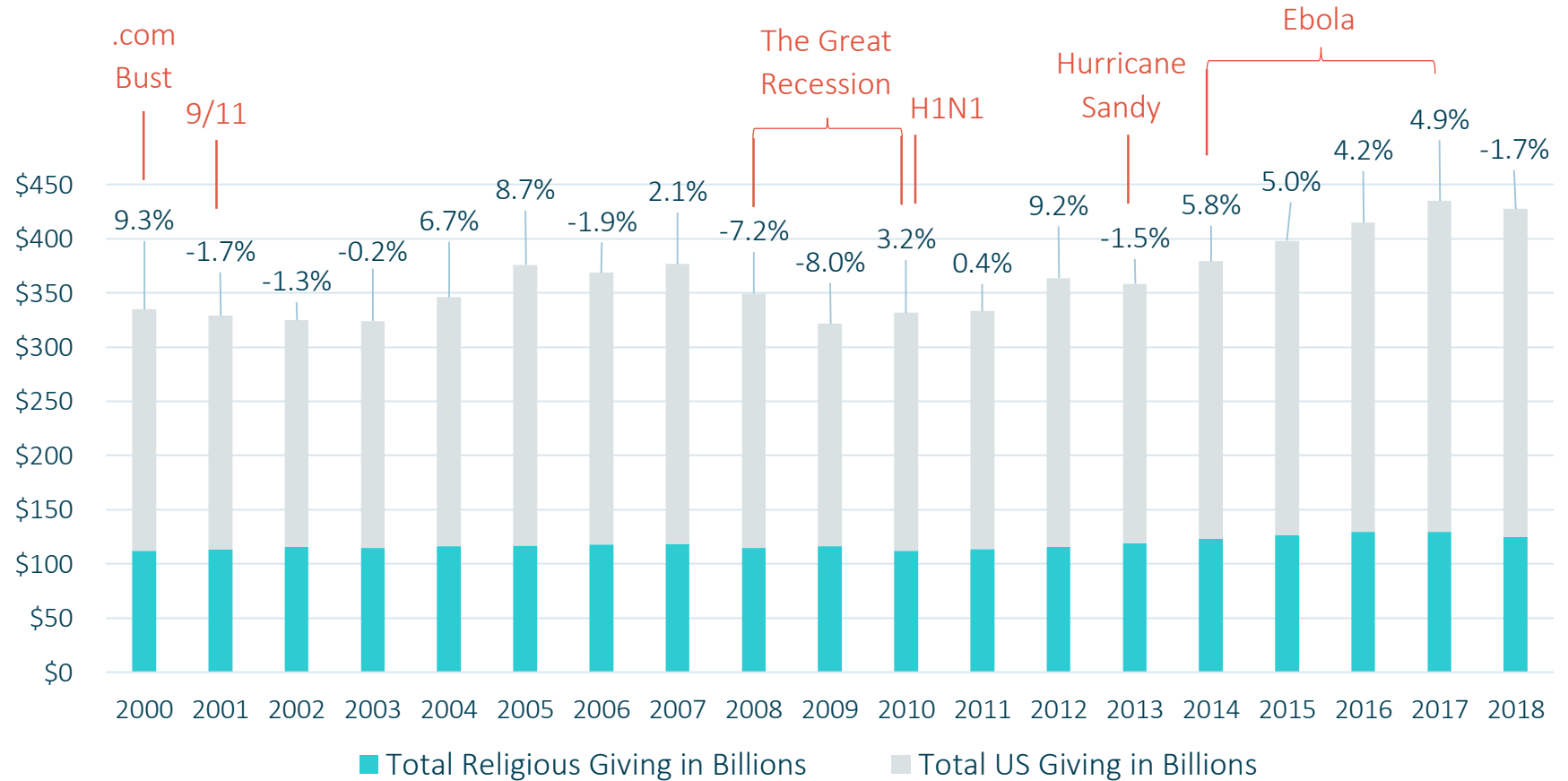


EVELYN CHEN
Assistant Vice President

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.

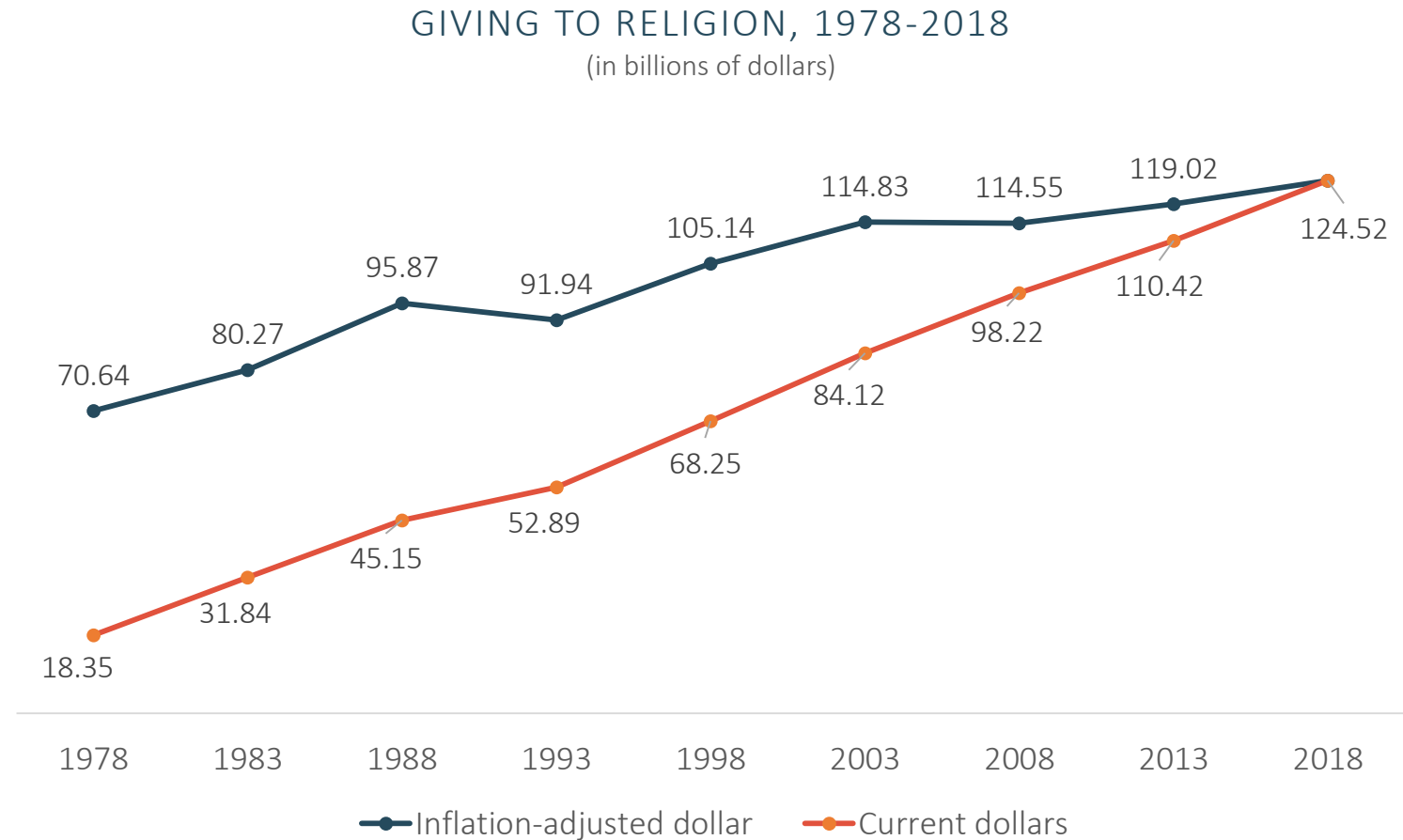
TOTAL GIVING & RELIGIOUS GIVING 2000 – 2018



The Philanthropic Landscape

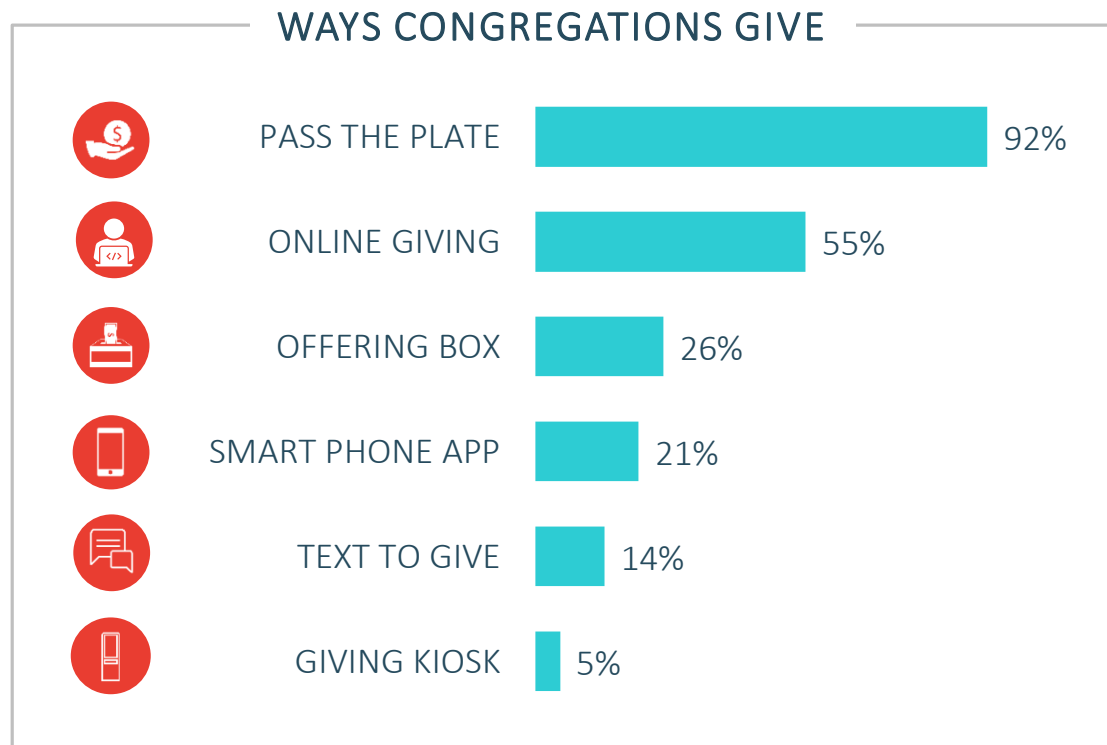
In 2018, Americans gave **\$427.71 billion** to charitable causes.

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

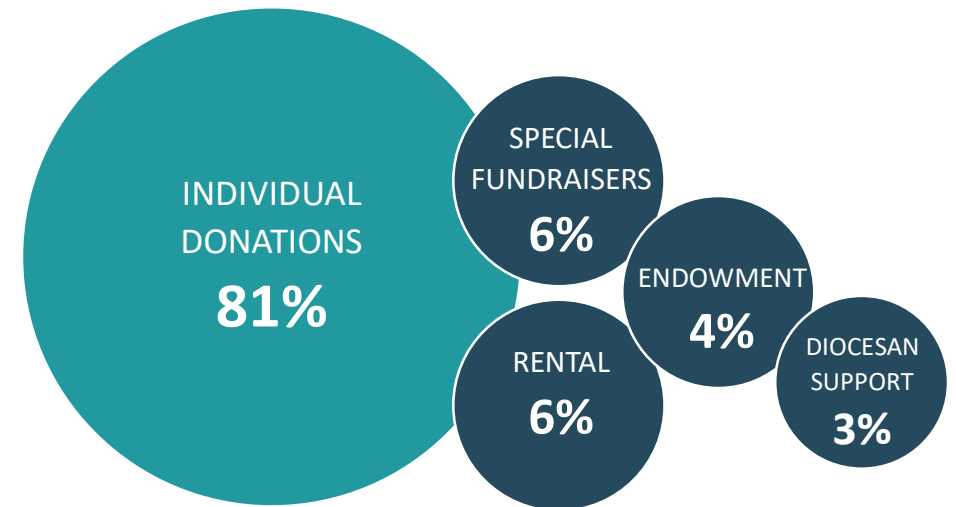


The Philanthropic Landscape

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

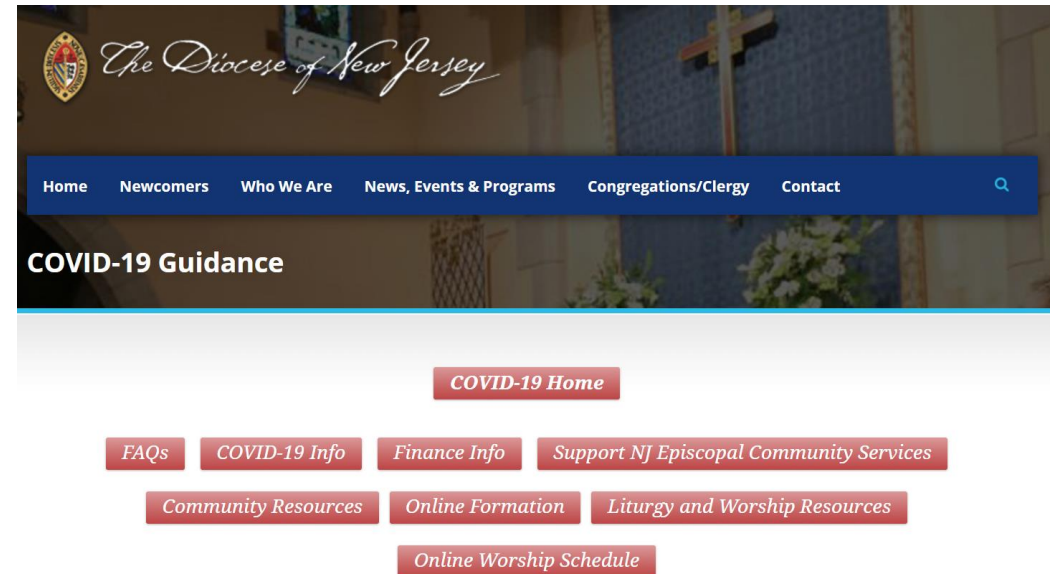


Giving by individuals continues to make up the largest portion of overall giving (68%), and individual contributions make up even larger percentages of giving to congregations than nonprofits overall (81%).



The 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

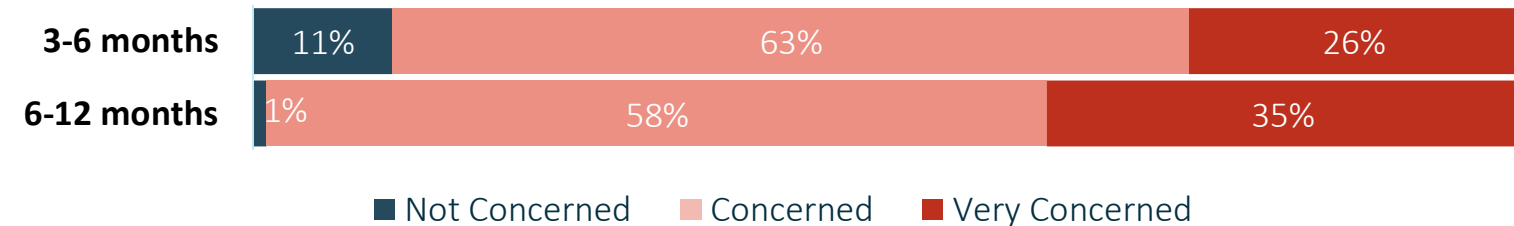


140 CONGREGATIONS

*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...



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.

140 CONGREGATIONS

*Based on responses
from 86 congregations*

The Diocese of New Jersey - Today

- 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

VANCO

PayPal

PAYSIMPLE

Zelle

faithstreet

TITHE.LY

stripe

Pledge & Plate Recovery and Growth Plan Goals

1

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.

2

Finding effective ways of sharing that people are already coming forward to ask: “What does the congregation need and how can we help?”

3

Providing regular updates on fundraising progress and encouraging one another to reach your collective goals, as success floats all boats.

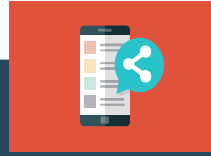
4

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.

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



4

Celebrate successes
and keep volunteers
motivated



3

Initiate engagement
strategy



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

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



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

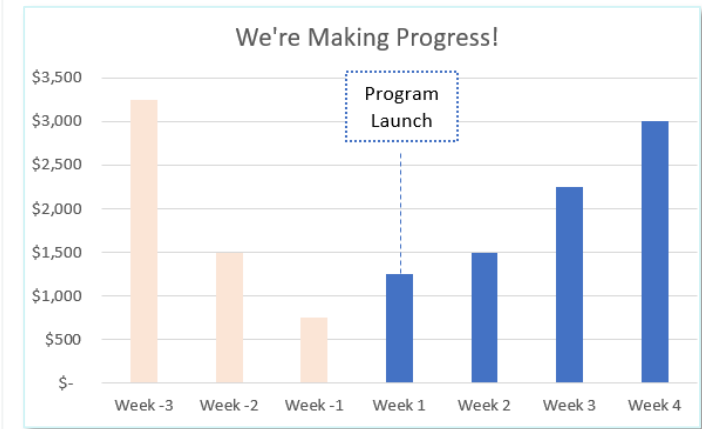
Must Have	Helpful to Have	Have If You Can
<ul style="list-style-type: none"> <input type="checkbox"/> Website (or Facebook page) <input type="checkbox"/> Access to congregant emails <input type="checkbox"/> Ability to generate regular e-blasts <input type="checkbox"/> Ability to receive pledges and pledge payments electronically 	<ul style="list-style-type: none"> <input type="checkbox"/> Easy-to-Access online giving portal (such as Vanco) <input type="checkbox"/> Virtual prayer group / Bible studies / Sunday School <input type="checkbox"/> Ability to livestream services <input type="checkbox"/> Ability to conduct video conferences for Vestry and ministry meetings 	<ul style="list-style-type: none"> <input type="checkbox"/> Ability to create and deliver daily or regular video messages to congregation <input type="checkbox"/> Staff member dedicated to hosting church webinars and livestreamed services and posting videos online <input type="checkbox"/> Other social media channels



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

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.



**QUANTIFY
IMPACT**



**ORGANIZE
CONTACTS**



**INITIATE
ENGAGEMENT**



**CELEBRATE
SUCCESSSES**

Resources

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

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