PLEDGE & PLATE RECOVERY AND GROWTH PLAN

PREPARED FOR THE CONGREGATIONS OF THE EPISCOPAL DIOCESE OF NEW JERSEY

May 12, 2020
COMPLETE THE LIVE POLL NOW!

The Live Poll with **four questions** should appear in a separate pop-up window. Remember to scroll down to see all questions and the “Submit” button!

1. What is your role in your congregation?
2. Has your parish developed its COVID-19 impact statement?
3. Have you begun making phone calls to members asking for support?
4. How comfortable do you feel talking to members about giving?

We will share the results once the majority of participants have responded.
Opening Prayer

1. Introduce new CCS Team members
2. Recap Goals and Key Activities
3. Review Phone Call Talking Points
4. Breakout Discussions
5. Parish Spotlights
6. Immediate Next Steps

Closing Prayer
Today’s CCS Team

CHARLIE MICHAUD
Principal & Managing Director

ERIK KIERNAN
Corporate Vice President

EVELYN CHEN
Assistant Vice President

CARMEN DONOHUE
Senior Director

MARC GARCIA
Vice President
Last Week’s Progress

- 29% have developed your COVID-19 impact statement
- 92% have general phone outreach underway
- 25% are addressing giving during these phone conversations
Pledge & Plate Recovery and Growth Plan Goals

1. Making personal, meaningful contact with your members and friends to encourage engagement

2. Articulating your congregation’s needs and how members can provide support

3. Providing regular updates on fundraising progress to motivate volunteers and givers

4. Ensuring members are aware of and have access to the latest giving methods
Key Activities

- QUANTIFY IMPACT
- ORGANIZE CONTACTS
- INITIATE ENGAGEMENT
- CELEBRATE SUCCESSES
What do you say?

KEY COMPONENTS OF THE CONVERSATION:

1. Introduce the reasons for your call and ask how they are doing during this time.
2. Engage in warm conversation about their current situation and engagement level with the church.
3. Transition to outlining the church’s situation and the need for continued and/or urgent support.
4. If appropriate, make the request, walk them through ways to give, and encourage them to participate in online activities.
Likely / Possible Flow of Conversation

1. I’m sorry, who are you?
2. Why are you calling me?
3. Is this about fundraising?
4. I wasn’t aware that COVID-19 was having such a dramatic impact on the congregation.
5. I wasn’t aware that we had all these programs and/or outreach ministries.
6A. How can I help? How do I give? How do I increase my pledge? How do I make an additional gift?
6B. I want to help but cannot increase my pledge at this time.
6C. I want to help but cannot make any pledge payments at this time.
7. This has been great, what’s next?
St. Francis' Episcopal Church is a diverse community, accepting all. We gather to worship God, grow in faith, and share in fellowship. We go out to serve Christ by serving others.

EVENyONE IS WELCOME HERE.

St. Francis Services will be live streamed on Zoom* or on Facebook Live. Click on the icons below.

* Zoom is a more stable platform.

Upcoming Events:
Sunday Service Livestream at 10 a.m.
Liturgical Text may be found here.

News & Announcements

- 4/19/20 - Letter from Rector & Warden
- Blood Drive on May 26, 2020

Upcoming Events:
Sunday Service Livestream at 10 a.m.
Liturgical Text may be found here.

CONTEMPLATIVE PRAYER

Wednesday, May 13
1 p.m. on Zoom

CONTEMPLATIVE

Genesis - Bible Study by Fr. Frank Hubbard

Saturdays, May 2, 9 & 16
10 a.m. to 11:30 a.m. on Zoom

Visitors/Guests

We would love to hear from you.

Name
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Email
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Phone
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Type your message here...
BREAKOUT GROUP DISCUSSIONS

How would you explain the needs of your congregation at this time?

How would you transition from checking in to sharing the need and making the ask?

What successes and challenges can you share from your recent efforts?
Parish Spotlights

The Rev. Jack Zamboni
Rector
St. Francis' Episcopal Church
Dunellen, NJ

Tena Achen
Stewardship and Outreach Chair
St. David’s Episcopal Church
Cranbury, NJ
St. David’s Episcopal Church - Cranbury

- Started 2020 with a decrease in pledges of 12%

- When the church building closed:
  - Rector, Wardens and Vestry sent every parish household a letter
  - Please keep up pledges and gifts - PayPal option
  - Weekly eBlast, website, and Facebook
  - Pledge payments remained steady, some prepayment of pledges

- Main Revenue Loss - Rentals and Fundraisers - to date about $18,000 in income
  - St. David’s Challenge

- Outreach - Special appeal for RISE Food Pantry

- Staying in Touch:
  - Great virtual attendance
  - Ongoing Evening Prayer, Healing Service, Wiggle and Worship, book discussion group, committee meetings
  - St. David’s At Home, In Community

- Challenges - Replace lost revenue; Hire new Rector
Immediate
Next Steps

COMPLETED LAST WEEK:

• Developing your COVID-19 impact statement
• Organizing and segmenting your database

If you still haven’t completed the above, let us know your challenges and how we can help!

COMPLETE THIS WEEK:

1. Begin reaching out to your closest supporters
2. Recruit volunteers
3. Assign families to volunteers for outreach

IF YOU HAVE ALREADY COMPLETED ALL ABOVE STEPS, START MAKING PHONE CALLS THIS WEEK!

The quicker you can start making phone calls, the quicker you can start raising funds!
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)*

4. Assistance with List Segmentation
   *(Email Evelyn at echen@ccsfundraising.com for more information)*

RESOURCES TO COME

1. Regular updates and lessons learned

2. Diocesan content including online messages from Bishop Stokes
APPENDIX
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
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**

- PASS THE PLATE: 92%
- ONLINE GIVING: 55%
- OFFERING BOX: 26%
- SMART PHONE APP: 21%
- TEXT TO GIVE: 14%
- GIVING KIOSK: 5%

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
Sample Diocesan Stats

March 16: In-person service cancellations

April 2: Initiated engagement plan
It will be key to steward the 12% of new supporters so they continue to pledge in coming years.

Twenty-one percent increased their annual giving for 2020 from their 2019 pledge, showing a spirit of increased generosity in these parishioners.

With 57% of parishioners contributing at the same level in 2020 than in 2019, there is an opportunity to ask these families to consider increasing their gift next year.

It might be helpful to learn why 11% of parishioners decreased their annual giving in 2020.

Spend time stewarding lapsed 2020 givers.
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>Time Frame</th>
<th>Not Concerned</th>
<th>Concerned</th>
<th>Very Concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>3-6 months</td>
<td>10%</td>
<td>63%</td>
<td>27%</td>
</tr>
<tr>
<td>6-12 months</td>
<td>5%</td>
<td>60%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Based on responses from 119 congregations

112 churches estimated raising $6 million in Q2 (April-June) and believe $2.8 million (46%) to be at risk due to COVID-19.

On average, congregations allocate roughly 15% of their budget to outreach ministries and anticipate a 33% increase in demand for outreach ministry services due to COVID-19.
The Diocese of New Jersey - Today

- **62%** have the ability to receive payments electronically *(21 congregations are currently using Vanco)*
- **57%** of congregations presently without electronic giving intend on implementing it in the near future
- **84%** are sending email blasts or newsletters
- **66%** are sharing videos through their websites, Facebook pages, YouTube, or other channels
- **66%** give regular social media updates
- **57%** are live-streaming services
- **18%** have a dedicated COVID-19 space on their websites

Based on responses from 119 congregations
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
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
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...”
COVID-19 is having a profound impact on our parish. This time last year, we raised $40,000 and in the current environment we’re anticipating a shortfall of $20,000 and needing to raise significantly more in new money. This anticipated loss in pledge and plate income is impacting us greatly as we expect expenses to increase to meet the needs of our community at a time when our ability to retain and increase staffing levels are significantly constrained.

While the day to day realities of running our congregation remain, our immediate priority is to ensure that we can minister to one another and those most in need in our community, especially in relation to combatting hunger and malnutrition, connecting those suffering with existing government services, and providing resources to the elderly. This requires increased and sustained charitable support.

Some families have been coming forward to ask how they can help. Our goal is to speak with everyone in the congregation about the impact COVID-19 is having on the congregation’s ministry and to explore their potential charitable support, especially pledges over time and gifts via our e-giving platform.
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>
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
Suggested Script: Open the Conversation

A group of us have been getting together to call parishioners to check in. How have you and your family been during this time?

Is there anything you need from [Congregation]?

How can we be praying for you?

Have you had a chance to check out the livestreamed worship services?

Do you have any advice for [Clergy] and Vestry in how we can improve communications and virtual community during this time of physical separation?

Although we’re grateful to have modern technology to keep us connected while we wait for a resolution of this crisis, the unfortunate reality is that these solutions are not perfect.
Suggested Script: Transition to the Need

Not having in-person services has had a serious impact on our plate collections and pledge fulfillment, and our financial outlook is worrisome. Our pledge and plate totals are down by [xx%] the past month.

We understand that this crisis has impacted everyone and has caused a great deal of economic uncertainty. Have you been able to maintain your pledge support of the church during this time?

Even with the closure of our offices, the church still has expenses that are becoming harder to meet, and the demand for our community outreach services are increasing. We’ve had to make some difficult decisions, such as [staff reductions, program elimination, etc.].
Suggested Script: Asking for Support

If you are able, would you please consider [making up pledge payments] / [making a special contribution] to help us overcome this unexpected drop in revenue?

We are dependent upon the generosity of our members to continue our ministries and to maintain our staff.

[Congregation] has an Online Giving program that we’re hoping many will consider using [explain how to access Vanco or other platforms].

Please know that this call isn’t meant to make you feel pressure over a financial commitment, we’re just working to inform our congregation of the need for their continued generosity to keep up with our bills.

Don’t forget to THANK THEM for their support to date!
What Size Gifts Are Needed?

**EXAMPLE**
$20,000 PROJECTED SHORTFALL

1 gift of $5,000

2 gifts of $2,500

5 gifts of $1,000

10 gifts of $500

**EXAMPLE**
$40,000 PROJECTED SHORTFALL

2 gifts of $5,000

4 gifts of $2,500

10 gifts of $1,000

20 gifts of $500
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