



# STEWARDSHIP, STABILIZATION, & SUSTAINABILITY

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PREPARED FOR THE CONGREGATIONS OF THE EPISCOPAL DIOCESE OF NEW JERSEY

June 16, 2020



# Agenda

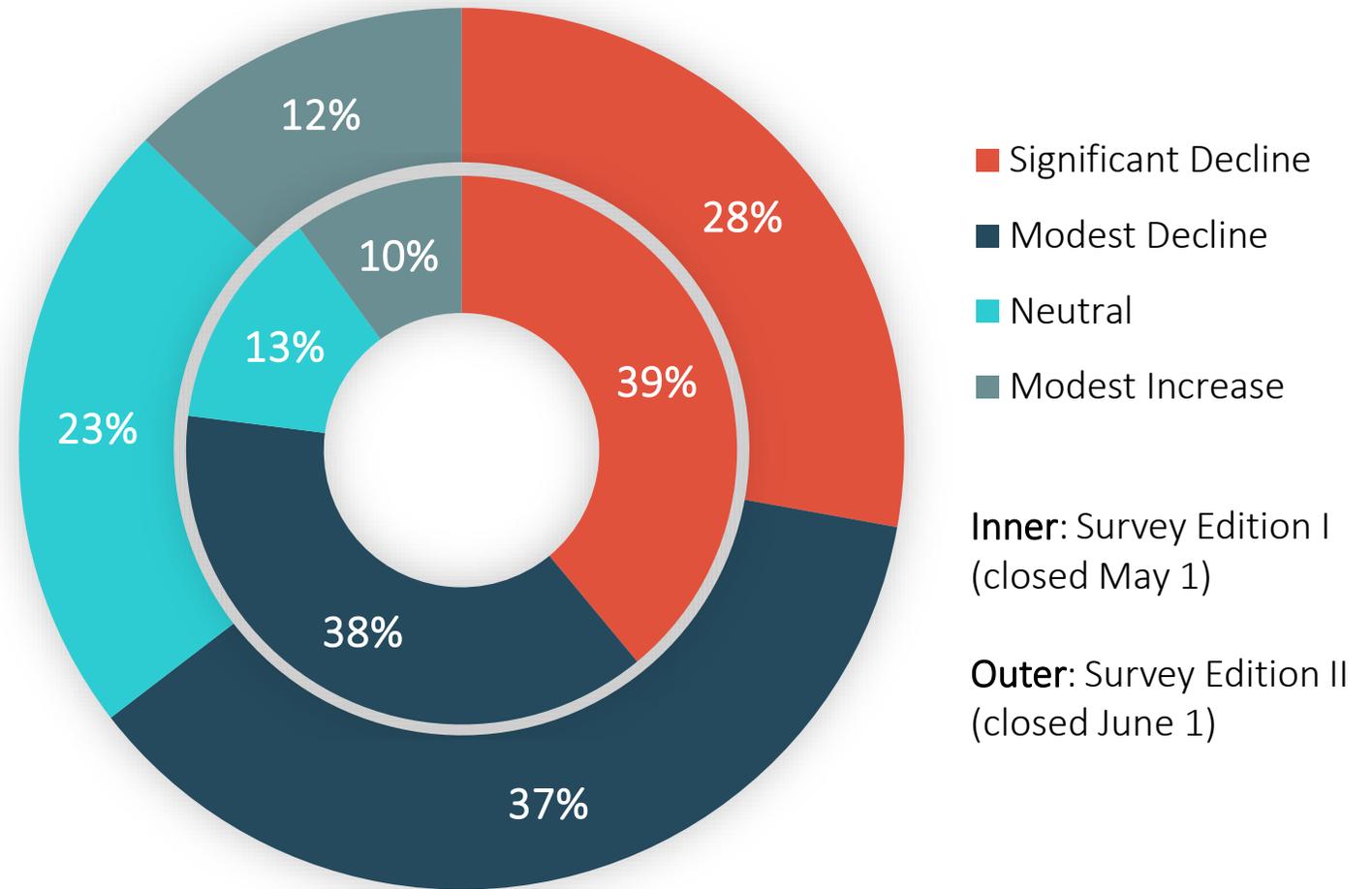
## *Opening Prayer*

1. Impact of COVID-19 on Religious Organizations (Updated)
2. Stewardship, Stabilization, & Sustainability Plan Overview
3. Priorities for the Next 3-4 Months Recap
4. Transitioning Your Events
5. Breakout Discussion
6. Comments & Discussion
7. Immediate Priorities

## *Closing Prayer*

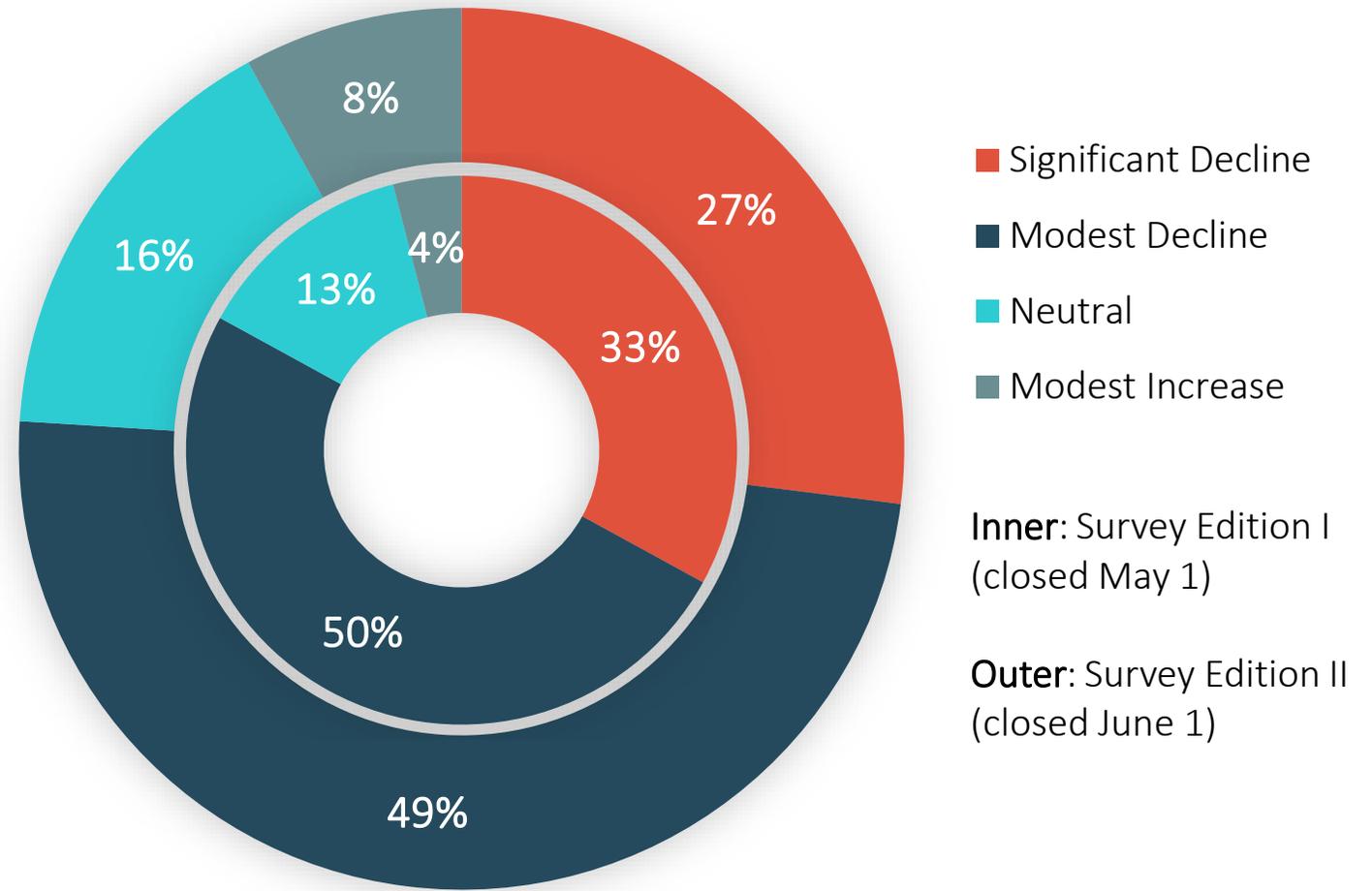
# Year-to-Date Fundraising Impact of COVID-19 on Religious Organizations

- While the fundraising landscape is still challenging, religious organizations are experiencing **less decline than expected**.
- Declines in revenue were reported by **77% of respondents on May 1**, while this number reduced to **65% on June 1**.
- The above plus **increase in neutral responses** reflects the experience of EDNJ parishes where **PPP and prepaid pledges** have led to less revenue loss than expected.



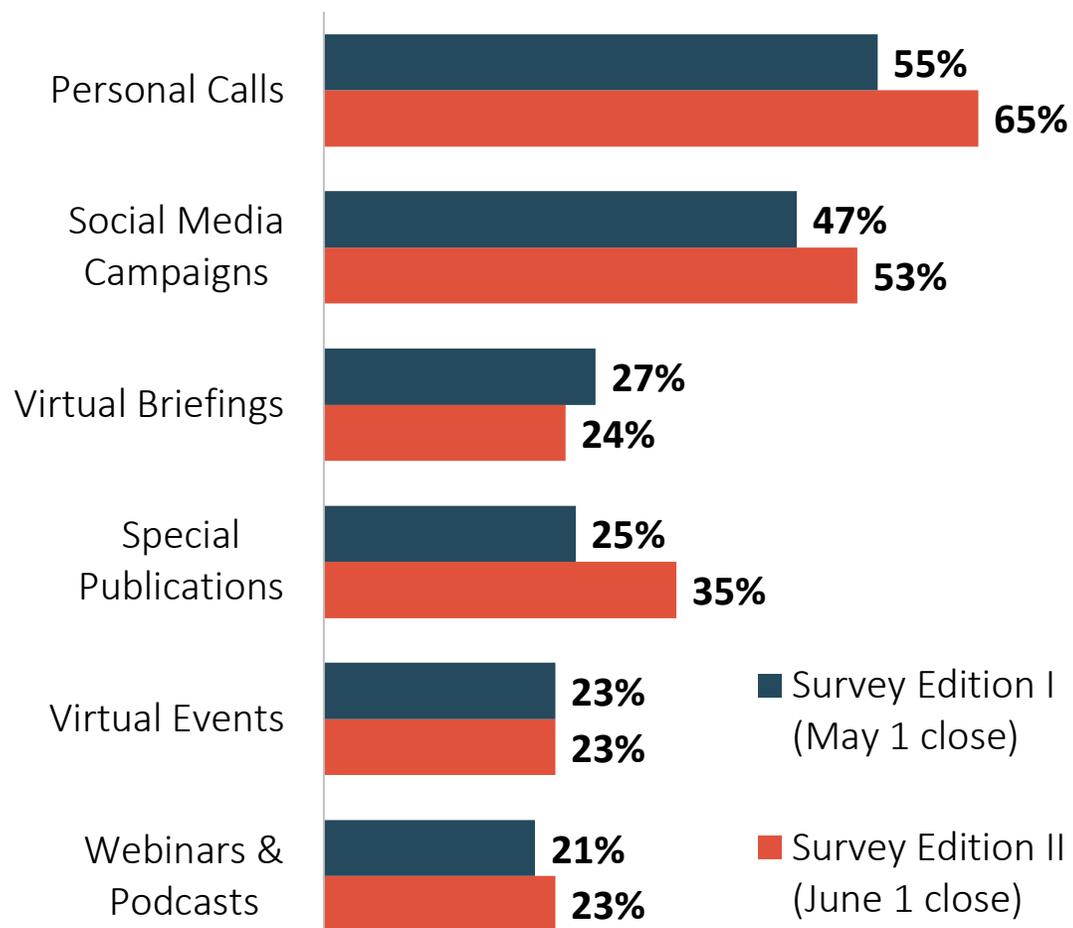
# Year-End Fundraising Impact of COVID-19 on Religious Organizations

- The sentiment regarding expectations through the **end of the year** is also **improving**.
- While the **majority of religious organizations on June 1 (76%) still expect a decline**, this is a **lower proportion** than the 83% who reported in May that they were expecting declines.

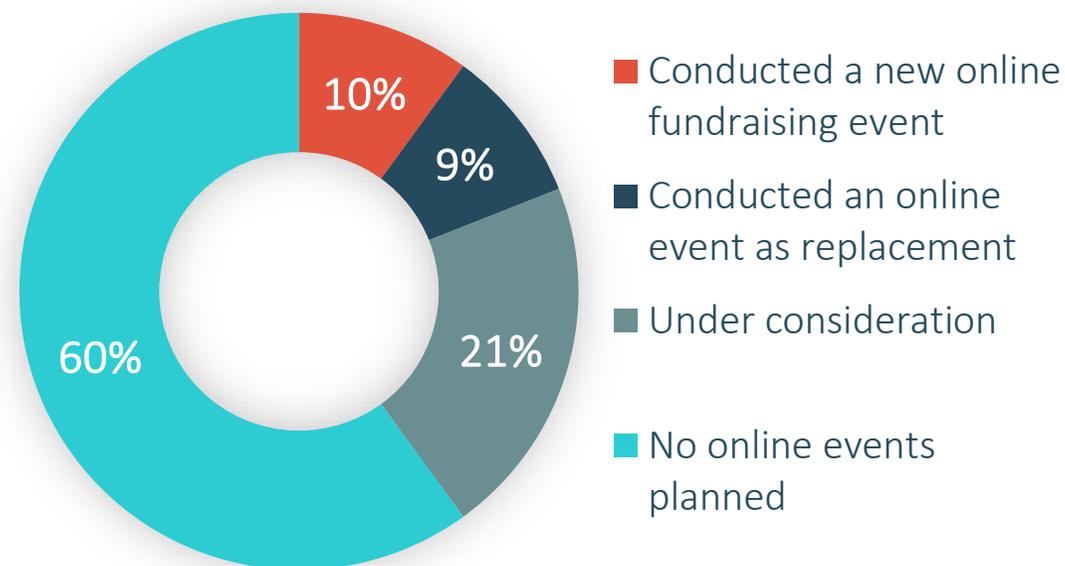


# Fundraising Impact of COVID-19 on Religious Organizations

## DONOR ENGAGEMENT METHODS



## VIRTUAL FUNDRAISING EVENTS



Nearly **1 in 5** religious organizations (19%) have conducted a **virtual fundraising event** (new or as an replacement) while **another 21% are considering hosting one.**

# Planning for Future Activity: The Next 12-16 Weeks



## MESSAGING

- Conduct cash flow projections to identify outstanding or anticipated financial needs
- Establish new or modified priorities based on progress made to date and projections
- Update messaging to reflect new/modified priorities



## LEADERSHIP

- Identify leaders to help drive activity and identify and engage givers
- Collaborate with stewardship committee on messaging and impact



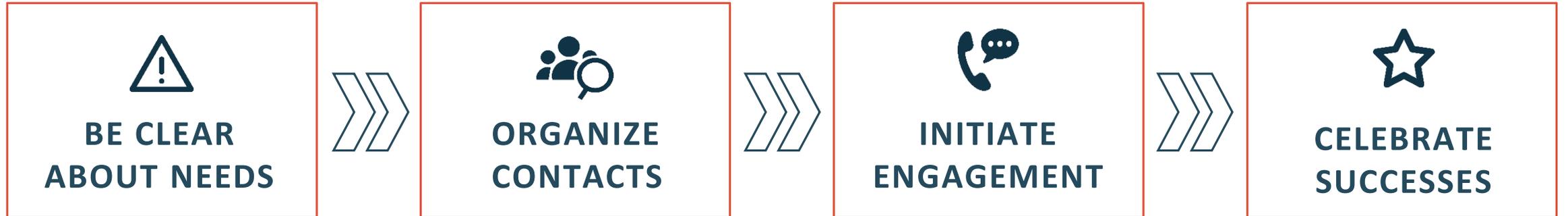
## ENGAGEMENT

- Continue to engage families and members, especially top givers, through virtual communities and personal phone calls
- Consider alternative appeal strategies and virtual events to replace traditional in-person events

# Sample 90 Day Plan

	June				July				August			
Activity	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4
Revise cash flow projections	█				█				█			
Update messaging and priorities	█					█				█		
Identify and train leaders/volunteers to drive activity	█						█				█	
Continue personal calls to members / Convene team for regular updates		█				█				█		
Fall Stewardship drive planning				█			█			█		█
Transition cancelled/postponed events into virtual events					█							
Make decisions regarding Fall events									█			
Share updates in e-blasts, newsletters and social media	█		█		█		█		█		█	
Continue live-streaming services and encouraging on-line offerings	█				█				█			

# Stewardship, Stabilization, & Sustainability Plan Overview



- Articulate your congregation's needs during this COVID-19 crisis and how members can provide support
- *“Revenue is uncertain and mission-related expenses are up!”*

- Identify and organize congregation contact information
- Create ‘tiers’ of families to ask for special support, beginning with the most likely and capable

- Create/expand virtual communities
- Make phone calls to members to encourage engagement and request support if appropriate
- Promote online giving methods

- Host weekly ‘report’ meetings for volunteers
- Provide regular updates on fundraising progress to motivate volunteers and givers

# Initiating Engagement

Where in the plan do you feel your parish needs the most help?



## WAYS TO ENGAGE YOUR CONGREGATION:

Check-in/Update Phone Calls	Phone calls to ask for support	Pre-recorded phone messages / texts
Weekly email updates that inform and inspire	Live-stream worship services & coffee hours	Brief video updates from clergy or leader
Town halls	Small groups	Virtual events

*What other types of activities are you doing in your parishes?*

# Example Talk about Giving from the National Cathedral



# Tips for Conversations About Financial Support



## Let the case be your guide

- Update the impact statement once cashflow projections are complete
- Focus on the near- and long-term future of the congregation
- We need to prepare



## Share the good news

- People have been generous by prepaying or making special gifts
- Volunteers have stepped forward to call everyone
- The calls are being well received
- Live-streamed services and coffee hours are popular



## State the need

- We're getting by but we need to prepare
- Looking to the next few months, we're going to struggle without the plate, fundraiser, and rental income

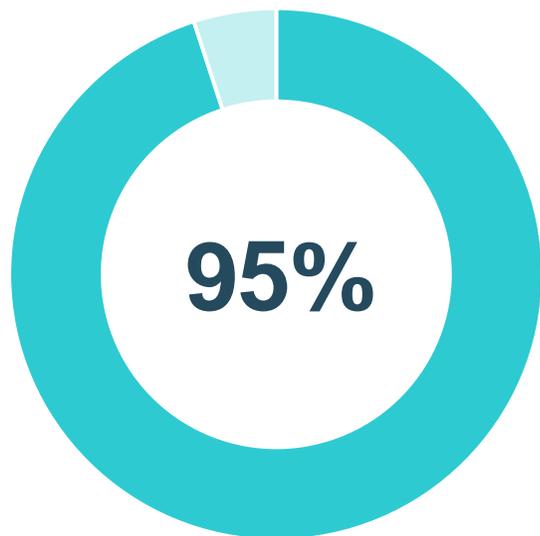
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LIVE POLL

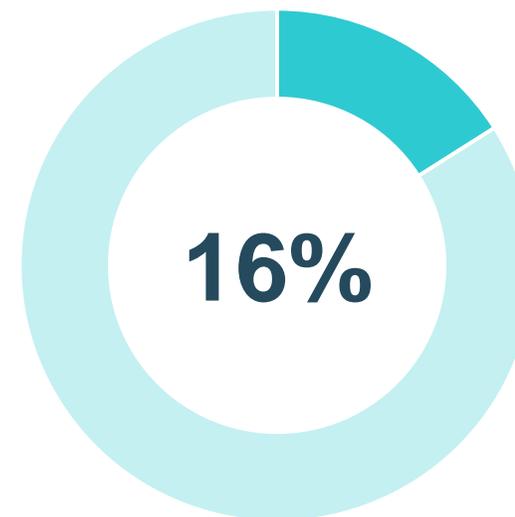
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# Fundraising Events

*According to Live Polls taken during the previous training:*



have had to cancel / postpone fundraisers  
this spring or summer due to COVID-19



have made plans to transition cancelled /  
postponed fundraisers to virtual events

# Transitioning Your Events



- What were the goals for your event, and where were you in the planning efforts at the time of postponement / cancellation?
- Develop an alternative engagement strategy or program.
- Redirect staff and volunteer efforts.
- Notify all involved of the event transition decision.
- *Even cancelled events can retain revenue through compelling communication and outreach.*
- Develop the appropriate working group, action steps, and timeline to make the event a success!

# Assess Purpose and Impact

PURPOSE AND IMPACT	PLANNING	TIMING
<ul style="list-style-type: none"> <li>• <b>Fundraising:</b> does this event generate irreplaceable funds (i.e. from non-members)?</li> <li>• <b>Engagement:</b> who participates in this event, and does your congregation have another way to reach/involve them?</li> <li>• <b>Stewardship:</b> how does this event serve as a vehicle for community awareness? What other platforms are available to accomplish that publicity?</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Donors/Ticket Sales:</b> have you already raised funds or secured commitments for this event?</li> <li>• <b>Logistics:</b> what logistics or contracts are already committed? What are the options and risks associated with changing your plans?</li> <li>• <b>Staff:</b> what staff are still available for event planning – in past or altered format?</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Safety:</b> What are the social gathering limitations at the time of your event?</li> <li>• <b>Redundancy:</b> Is there an opportunity to combine this event with a future event? What challenges would present from that option?</li> <li>• <b>Heightened Awareness:</b> Can we take advantage of this time of increased online participation to celebrate a successful event?</li> </ul>



# Transitioning Insights Into Actions

CANCEL	DELAY	VIRTUAL EVENTS	ALTERNATIVE STRATEGIES
<ul style="list-style-type: none"><li>• Avoid wholesale cancellations if possible.</li><li>• If it's not possible to transition to a virtual event, consider alternative avenues of solicitation and engagement.</li></ul>	<ul style="list-style-type: none"><li>• If the event must be held in-person, carefully consider the date – don't try to outguess the pandemic.</li><li>• Determine how a delayed event will affect your overall budget.</li><li>• Communicate the new plans as soon as possible.</li></ul>	<ul style="list-style-type: none"><li>• Pros: cost-effective, lots of flexibility, seamless data collection.</li><li>• Cons: less personal touch, fewer incentives, potential zoom fatigue.</li><li>• Explore the best software options for video, live-streaming, ticket sales, raffles, product sales, auctions, and fundraising.</li></ul>	<ul style="list-style-type: none"><li>• Leverage technology now with a planned in-person component down the road (thank you reception, etc.).</li><li>• Conduct a small in-person event with virtual attendees attending "watch parties".</li><li>• Send virtual attendees a catered dinner as part of ticket purchase.</li></ul>



# Keeping the Congregation Informed

- ▶ **Over-Communicate:** Regardless of your go-forward plan, maintain communication with members – remember it’s physical distancing, not social distancing. **Keep making those phone calls!**
- ▶ **Rethink Your Event Name:** Acknowledge a virtual event will not be the same gathering – consider renaming your event to underscore this (i.e., “The Pajama Ball: A Night of Giving in Your PJs”).
- ▶ **Facilitate Connections:** Consider incorporating/encouraging watch parties or breakout groups. Providing personalized access to clergy and event leadership can help make the event more memorable.
- ▶ **Generate Excitement:** Display the event fundraising goal thermometer and donor wall live. Consider securing a matching gift to encourage greater levels of generosity. Brainstorm new recognition levels and benefits for virtual event donors.



# Resourcing Your Plan

- Think **outside of the box!**
- If cancelling or postponing, turn **ticket refunds into donations.**
- **Re-think your invite list:** If you are transitioning to virtual, cast a wider net and expand the invite list to everyone who has participated in live-streamed worship these past few months or for whom you have an email address.
- Consider **online auctions and raffles:** online vendors specialize in raffle-focused and silent auction-related events.



ASSESS

DECIDE

COMMUNICATE

EXECUTE



## BREAKOUT DISCUSSIONS

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What are some creative things your congregation has done during this time of separation to engage parishioners and/or solicit support?



# COMMENTS AND DISCUSSION

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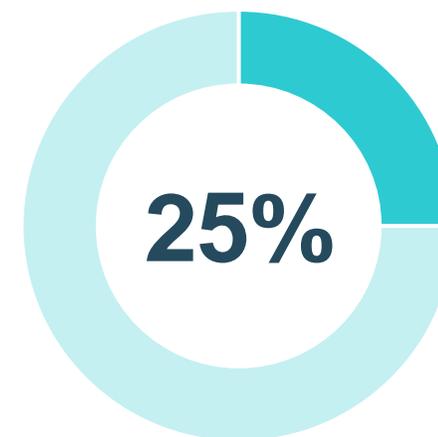
[ccsfundraising.com](http://ccsfundraising.com)

[ednj@ccsfundraising.com](mailto:ednj@ccsfundraising.com)



# Immediate Priorities

1. Complete cash flow analysis and modify impact statement
2. Present needs to members online and over the phone
3. Find out from Stewardship Chair or Stewardship Committee members where you are in planning for your Fall appeal
4. Ask members of your Stewardship Committee to join next week's training



have begun planning their  
Fall Stewardship drive  
according to the Live Poll  
taken during the previous  
training



# APPENDIX

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# The Core CCS Team



**CHARLIE MICHAUD**  
Principal & Managing Director



**ERIK KIERNAN**  
Corporate Vice President



**EVELYN CHEN**  
Assistant Vice President