

STRATEGIC GENEROSITY TRAINING TRANSCRIPT

SESSION 1 | THE FUNDAMENTALS OF GENEROSITY

All right, so let's talk about strategic generosity. This is based on GSBs product learning journey called stewardship for all seasons. And this is, for those of you who have done Stewardship for All Season in the past, I'm gonna apologize, you've probably seen a lot of this presentation. But you've never heard me go through the content. So hopefully, there's something new for those of you've maybe seen some of this before. So, so I want to start with fundamentals. And as preface to this, I need I need to, I need to preface the conversation by talking about GSPs history.

Forgive me, this is not this is not a sales job. But GSB as a firm comes from a vantage point, and I think it's helpful to shape the conversation, and why we talk about fundraising and stewardship the way we do. GSP was formed by three individuals in 1976. It's old, as old as I am. And they came out of the nonprofit world. One was a gentleman from Capital University in Columbus, Ohio, who was a development officer and another was a ALC, Pastor turned camp director who needed to fundraise for his camp. And the third was a lay person who'd been doing a ministry in the South Dakota, and the Dakota regions. And they formed what is now GSP fundraising. So they came out of this not directly from a congregational vantage point, and we're all representing congregations here today. They came out of this from the nonprofit vantage point, the professional fundraising vantage point, their primary clients for the first 10, almost 20 years of existence was nonprofit hospital systems. camps, in particular has always been a passion of GSB. So non congregational contexts and just like with anything, fundraising churches struggle for resources, and and so they had pastors invariably coming to them saying, Hey, could you just help out with our annual appeal? Help us know what to do? We got a budget shortfall, can you help us make up the difference? Our mortgage is too big, can you help us cover that? We need a capital campaign for this major expense expansion. So So congregational ministry is not where GSP started. And I actually think that's a strength because the vantage point it brings to congregational conversations is the nonprofit fundraising, and particular vantage point, some of you are gonna say, Well, isn't that the business world come meet the church?

Actually, I think the church's conversation around resources, and fundraising lacks a lot a lot of integrity. And what I like about the nonprofit conversation in particular is that is that there is a there is an ethical standard or bar that must be met in all nonprofit fundraising conversations. So there's a level of integrity and understanding of donor management and engagement. How gifts are one in the nonprofit fundraising world, you may not coerce you absolutely may not coerce people into giving things they don't want to give. So if you can't coerce people, if you can't guilt people, then what are the levers that you have to actually invite gifts and to grow stewardship and in the nonprofit world, I need you to understand even though the church may be struggling, we're seeing across nonprofits, record giving in all areas, and that's in part because the methodologies are really, really sound for telling organizational stories, for inviting people to participate at a deeper level for growing people where they're at, et cetera, et cetera, et cetera. He just put all these things together, and it produces incredible fruit. So I think that's

an advantage. I think I shared with you guys, most of you heard this, some of you weren't on yet, that I was a client of GSPs for a decade before I became a partner and joined forces with them. And I probably responsible for about a half million dollars of referred work to Mike Ward, our Managing Partner in particular, just because I believed in the process, and the stuff that they gave me. And so anyway, so I, I present this to you out of a deep appreciation for this process content and the way of thinking it's changed my thinking about fundraising, and I hope that it will help change your thinking as well.

So let's, let's talk about fundamentals. Let's talk about the pyramid of giving. Some of you've seen this before, but this is this is how you begin to think about the number of possible people out there who might give to your organization's particular needs. So you've at the base of the triangle, you've got the total number of prospects on record. You have people who are first time donors, they may have given \$20 for this year's annual appeal, but they've not done anything else. He's got the periodic donors that people that when they show up, let's just use the person who shows up for worship, they've got \$20 in their pocket book, and they throw that in a plate, or in the, in the box at the back of the church, since many of us don't pass plates anymore, the periodic donors, the regular donors, those folks who make pledges statement of intense whatever your language is, and it's a regular part of planned part of what they're doing to support your particular organization or congregation tithers, those who have benchmark they're giving at that particular percentage levels of their income, sacrificial donors, those who are giving above and beyond perhaps what is even safe for them to give. And then estate gift owners, those folks who are figuring out how to give planned gifts, either when they pass away, or there are all sorts of instruments and mechanisms for people to give significant amounts of money to organizations they love ahead of deaths anymore. And so there's there's all sorts of things there. But when you think about the pyramid of giving, we're thinking about where people are in their giving journey, identifying them, and then asking the question, in the in the story that we're telling as an organization, how do we move a first-time donor into a periodic donor? How do we move a periodic donor into a regular donor? How do we move a regular donor into a tither? How do we move tithers? Towards sacrificial giving? And then ultimately, how do we have conversations with people about making legacy gifts to our organization so that there are resources in perpetuity, beyond our time here. So the key thing here is when we engage people from a congregational context sitting in our pews, are sitting out there, people are not coming from the same place, everybody's on a journey of generosity. good stewardship, recognizes that people are in different places in this conversation and addresses them where they're at, and asks them to take steps that are appropriate to where they're at. So the pyramid of giving or some form of this thinking needs to be a part of how we put together these conversations about generosity. And when we think about comprehensive generosity, and congregational context, this is this is for nonprofit organizations. But the same thing works, you've got, you've got this three-tiered stool, and all of these things are essential to pulling this off, you've got your annual giving fund, you've maybe got an endowment fund, you have capital campaigns periodically for capital expansion, and those other big ticket items that aren't carried by your general fund. You've got what we hope is intentional planning. Like I think somebody said, you know, we give to stuff but we're doing we're not doing it with intentionality. How do you develop a strategic plan, strategic visioning, so that the generosity you're cultivating is going

towards really expanding the mission and capability of your organization in new ways? How you actually organize yourself together, and then undergirding it all is the conversation about communications? What is the story, we're telling about what our congregation does, the reason exists, where it's going and how it's serving the art, hands feet of Jesus in our community today, so when we think about gaining gifts from people, we think about this in terms of five particular moves, this will actually come up again, when we do the section on preparing a thorough annual appeal.

But we first have to identify who are the who are the potential donors for our organization or congregation out there. That can be a hard conversation, I think and congregations especially today, because post COVID We often don't even know who our people are anymore. We do have people on the membership roles. If your congregation is like the ones that I served recently, you have a constellation of people that haven't joined the congregation yet, but they're showing up on a regular basis. And then you have a constellation that people that may or may not formally be engaged with the congregation, but that are joining you online. So who is this range of people? That's a potential donor base, and what kind of information do we have on them? So when I'm working with congregations on annual appeal processes, the first conversation I'm having with them is a conversation about how good their member database management is, as silly as that sounds, most congregations I work with that particular conversations a mess, and it makes it hard to do this work because if we don't know who, who's connected to our congregation, we don't know who to invite into the story. To inform, motivate, ask and then think in terms of what Whatever the process is going to be so, but we need to identify who that body is, when I'm doing annual appeals. I counsel congregations, you're not just inviting members of the congregation to participate, you're inviting anybody who's associated with or impacted by the mission of the congregation to be a part of the conversation, everybody gets an invitation to understand what the strategic initiatives are with the vision is invited to participate at some level that's appropriate to them, and then asked intentionally to do that. So. So we want to identify who those people are. We want to cast a vision and form people. But the mission of the organization is right for a particular initiative for asking for gifts or need this needs to be married to a vision about what those gifts are going to accomplish. There needs to be some sort of inspirational torpid storytelling, testimonials, quotes, things that talked about how the organization is actually making a difference in the lives of people to survive, we're going to go from this conversation straight into impact storytelling, because the thing that's missing in the church today, across Christendom is the connecting the dots of why the local church still matters to the mission of God come back to that in a second.

But we need to motivate people with stories of impact about ways the organization is making a difference in the lives of people. God and the Holy Spirit are still acting through your local church, to make a difference in the lives of people advancing the kingdom of God. We need to ask people appropriately well, we spend a lot more time on this later on. But we need to ask people for gifts, and the asked needs to be a better than the typical, and I'm guilty of this as a pastor, I've done this. Y'all give now here's the needs. If you all just take a \$5 a week step of faith, we can overcome this deficit. That's a really, really, really, really, really, really poor ask, we need to ask better than that we need to ask in ways that are personalized, and we need to ask

in ways that are customized to where people are actually in their giving journey. And last but not least, I was horrible at this for years. This is my confession. But I got good at this saying thank you saying thank you for gifts given and support given but this whole conversation and it's reinforcing that when we say thank you well to people, it motivates them and inspires them to continue to participate, often at greater levels than before. So this is kind of the ecology of the conversation. Now, let's just talk one, one after another about principles of giving. Number one, I know you all your cause is bigger than your institution. I know that most of us as pastors or council presidents, or council persons are just I mean, often we come to a stewardship conversation, just like how do I get more money out of these people? How do I shake them down so that our organization can survive one more day? To tell the story of Jesus and how how the life death and resurrection of Jesus makes a difference on planet Earth and transforms the lives of people and our future, right? We just need to stay open one more day. How do I shake, shake this money out of people. But the truth is, organizations, nonprofits, and congregations that do that do fundraising, well, invariably are able to talk about their mission and terms that are always larger than their local expression. It's connected to a bigger conversation. And so for all of us, I mean, at the end of the day, what really inspires people survival doesn't actually inspire people long term. It may gain gifts in the short term. But you can only cry wolf so many times before that is burnt out. It does not inspire long term loyalty, trust and authority. So what's the bigger story that's being told here? How's it connect to a vision and a story, a narrative that's larger even than the local expression of who we are principle, principles of giving number to offer a standard of giving? It's an giving as mentored. You have people sitting inside of your pews that think they're being sacrificial, and they're giving at \$20 a week. They have no idea that there is somebody sitting three seats down in the same queue. That's giving \$250 a week until they see that and some sort of Giving chart and realize there are people that are reordering their lives to support this. So giving as mentored, it's, it needs to be talked about. And it may not be appropriate to say. And we don't do this in the Lutheran traditions that I'm aware of. If you are Mormon, you might do this, but we're not. So it's not like the sailor family over here gives 20% of their income. It's that we have X number of people at each of these giving levels until people see that they don't realize that there are people that are doing things that are far and away above what they imagine, imagine.

Let me tell you the story about this. I was on an internship, somewhere in Colorado, circa 2002 to 2004. Standing in the copy room, when my supervising lead the lead pastor walks in, and he starts printing off some things and I say to him, so and so what are you doing? He said, I'm printing off tax papers for the tax man. And I said, why? He said, Oh, we're being audited, audited. And I said, what you're being audited? It's a my naivete Back then I thought it you know, if you're being audited, you must be at person or something like that. I'm like, Why are you being audited? And he said, Well, my wife and I give half of our income away. And the IRS doesn't believe anybody would do that. So we get audited every year. So I just number one that blew me away. Not just that they were being audited. But it never occurred to me that people out there might give half their income away. And he said to me, Oh, don't think that's so great. Remember, Jesus set the bar pretty high. He's the one who said, sell everything you have give the proceeds to the poor, and come follow me. He's like, my wife and I aren't there yet. And I just it was a mic drop moment for me. He wasn't he was just, he was being nonchalant about

the whole thing. But there needs to be a standard of giving. We don't know what people are doing. And when we start understanding what people are doing, it can be inspirational and motivational helping us see the resources of our lives in a very, very different way, and reordering our own resources to see what's possible. So there needs to be a standard of giving. Number three, principle of giving. Number three, the giver needs to give. It is good for people to be generous. I encountered this all the time in my life is people's light bulbs turn on with generosity. The joy that ensues in their lives is not anecdotal, it's actual. I believe that this is a theological conversation for those of us in the church. If we are if we believe Genesis chapters one through three that were created a Mago day God is fundamentally in God's self generous. If we are created in the image of God, I believe we don't begin to touch that Imago day and inside of each of ourselves until we begin to understand what it means to be generous ourselves. So generosity conversations, I think are our birthright. And they're part of us being disciplined into our own fundamental identities, as creatures made in the image of God and principles of giving them before giving begets giving. When we see people, people being generous around us, we're inspired to be generous ourselves. So the modeling of generosity has profound impacts, and generosity in one space of a congregation's life in particular, will have impacts on generosity.

And another particular part of carnations life give you a for example. I was surprised when I did my first capital campaign at St. Stephen Lutheran Church in Longwood, Florida. And we raised we raised twice our annual budget for a three year capital campaign, which was incredibly successful, even back then. And this was in 2009. So it was the worst economy that we had seen in 40 years at that point, right. It was a very successful capital campaign. I was shocked when our general fund giving increased by 80% to and I remember coming back and talking to a friend I knew at the time. And him saying, oh, yeah, that's, that's typical. It's more often than not capital campaigns, without asking cause an increase in general from giving as well. Now, that's contrary to how I would have thought about it, I think that people give out of, you know, finite buckets. It just turns that in terms of human psychology, people give different amounts to different buckets. They're going to give this amount of this bucket, but they have more to give. And so they're going to give to this bucket as well. And that's what ends up happening. And we see that over and over and over and over again. It's counterintuitive, but we see it all the time. It's not anecdotal, it's, it's in general actual. There are some instances I've heard of where we've seen the opposite. But there tend to be other things going on in those particular dynamics. And we can talk about those later if you guys want. But principles of getting number five, differentiate between reasons and excuses, the biggest excuse makers, for people and people not giving inside of congregations who are pastors. We make excuses for people. We say, Let's not ask that person, they're on a fixed income. We say we just make all sorts of excuses. So how do I want to talk about this? Forgive me, guys, let me just get my hard drive loaded around this. Because this is going to be kind of a touchy topic. In general, I don't know what your Polit your policies are in your congregations we encourage from a different perspective, pastors have access to giving records. And when you do have access to giving records, you are often surprised by what you find, you routinely find that the wealthiest people in your side of your congregation are not the most generous as a percentage of income or otherwise, that there's a ton of capacity and you'll often encounter, what the data is telling us is true as well. And that is, the

average Protestant in the US gives point six 5% of their income to the mission of the church. Not 6.5% point six 5%. So there was a ton of capacity. I heard Pastor say, well, they're on fixed giving, fixed giving does not mean are a fixed income, they're on fixed income. Fixed income does not mean poor, not in the United States of America. So we'll create all sorts of excuses for not asking people when a better policy is to if you know that a family is fighting cancer, like we have a process for that when it comes time to ask people for gifts and annual appeals. If somebody's going through some sort of pastoral situation, there are ways to address that, and acknowledge they may still want to participate. Do not take that right away from them, acknowledge their situation and invite them to participate. However, it makes sense for them in that particular moment. But don't take the opportunity away from them because you assume they can't. That's dehumanizing. And it delegitimizes the gifts and abilities of people that often pastorally we do not have the capacity to see. So don't create excuses for why people shouldn't be included find reasons to include everybody in your appeal processes, in your invitation process, whatever they may be treating people as if they're adults, because they are. So principles of giving number five, differentiate, differentiate between reasons and excuses. Principles of giving number six, you all know Pareto. The unfortunate thing is that this doesn't change. Now, the truth, however, is there's always people falling out of that 20% and new people coming into it, and you don't get the new people coming into it without active cultivation, and invitation. But this number doesn't typically change. It just seems to be a principle in all areas of life, but again, you do not cultivate and grow that 20% Number filled with new people without ongoing invitation to participate. Principles of giving number seven examples are key. I've already talked about mentoring, storytelling, but people need testimonials. They need to know how other people are reordering their lives to make things possible because they believe that the mission of the church's mission of this particular appeal, the vision that's been cast is absolutely essential. And you just get need. We as human beings need models, we need models in one another to be inspired to new places and spaces, principles, giving them great interest follows involvement. Which means that fundamentally, often the place we begin stewardship development is not with asking people for money. In fact, that's never where we should start. And first, we involve them in a vision. First, we inform people we connect the dots for them first we inspire. Before anything else happens, those things, participation gets invited. Those of you who participated in capital campaigns, probably know that capital campaigns are won and lost by how many hands have actually touched the process of the execution of the campaign. There's a reason for that. People who touch the campaign More likely to be aware of number one that it's happening. Number two, what it's about, and what the point of it is three, they're going to be more aware of how important their participation and household participation is. And four, they're going to be more likely to respond when asked to respond. So interest follows involvement. people's hands need to be touching things for them to understand why it's important, why it's important to them, why it's important to the organization, principles of giving number nine, you've heard will say people give the vision that's actually not true. People give to people to leaders who embody vision. People give to people who embody vision, which means the trustworthiness of us as leaders is absolutely paramount and essential. In that sense, generosity, when you're doing intentional asking, is a vote of confidence or not in leadership, in the vision casting that we're providing, and that's a hard thing to stomach and think through. But it can also be a litmus test for checking our own leadership, and maybe the quality of our

leadership or the quality of our vision casting, and the quality of the training that we're doing, that people give to people who embody vision, people don't give directly to vision, principles of giving them pretend people give to success. It's so much fun to participate and be a part of things that are winning. And I know that in church circles, we know many don't like to use the word meaning, but what does it mean to be having more baptisms? And how does it feel in your congregation when more baptism start to happen, or when you start having that odd adult baptism or teen baptism? What that does for the spirit of the congregation, how much excitement that's there. Those kinds of stories about the impact of your organization's the impact of your congregations in the lives of people, inspire people to focus on and support what's happening, people get to success. That's the nonprofit secular way of talking about that. But it's also true of human psychology in congregational contexts. So finding the wins to celebrate essential, and I know that even in the most difficult congregational context, there's always something to celebrate principles of giving them relevant, the largest single reason people do not give is that if we were all on, I'd ask you to say read this out loud with me. So just now that behind your silence screens right now, they've never been asked. We don't we don't ask we don't ask well, and again, we'll talk more about that. Last but not least, principles of giving number 12. The best prospects are those who have already given so I know, when I get invited to annual appeals date that we've got 100 People that don't give anything of record to the church every year. And I'm always that I have to be the bringer of bad news that the reality is their greatest capacity for growth is not in the 100 people that are giving nothing. With intentional focus work. We might get 10 of those folks to turn into dollar a day-givers and in typical annual appeal, but they're the hardest people to get bought in. When people are non givers. It's usually for a reason. They're just not bought into the mission of the church. It's just not central to their lives central conversation, and you'll invariably see that the people that will respond.

SESSION 2 | IMPACT & GENEROSITY STORYTELLING

And generosity? Well, it's everything if generosity is the reallocation of the resources of our lives to support things that matter. To us, storytelling helps us understand the why of that. So one dimension of that is, of course, what people give financially to support congregations like yours. I am increasingly convinced that one of the malaises of the church is we cannot answer the question why the local congregation. And I've been doing essays with congregations now two cycles on a consultant side of things, my witness is it is amazing how quickly congregations shift their understanding of themselves positively, and financially begin to support their mission. With way more resources, Tom Pete's can witness to this and did early on, when they understand the why. So just as we start this, start this conversation, I know that I know that I hear from pundits all the time. A belief in the decline of the church, I personally think it's a reset, not a decline. And it was written in the demographic cards, when boomers decided to have a generation after them that was half to two thirds the size, I mean, that what we're dealing with today was could have been easily predicted just based on demographics. Aside from that, the other kinds of technological and historical things that have gone on around us the decline of the centrality of the church and culture, all that type of stuff. I mean, many of us would argue that's probably an asset to us, not a liability when it's all said and done. You can have that conversation later if you'd like. But I think what that means for us when the church isn't the center of the cultural conversation, by the way, it didn't understand its why when it was the center of the cultural conversation, I mean, since the constant unionization of the church circa 13, something or 333 30, AD or AD, when when church became the religion of empire, that churches primarily functioned as a as a as a cultural problem, which was not the mission of Jesus that Christ crucified and risen. So we have an opportunity, I think, and today to talk about the why of the church and really, really compelling ways and I know many of us internalize those visceral trained as pastors. The South African missiologist Bhatia always say his last name, right, wrong. He ends is a seminal text with the question. The question isn't whether or not Christ Church has a mission? The question is whether or not Christ mission has a church. And I think since he wrote that back in the 60s 70s, those more forward thinking of us have been using that to deconstruct a local congregation ever since my witness to you is that Jesus hasn't given up in a church. Often pastors and parishioners, but Jesus hasn't, that when we get people starting to talk about the ways that that the spirit is actually working as a lever of transformation. And communities get people seeing the things that's happening around them people's sense and hearts towards their, towards their churches begins to change radically, but we've got to start cultivating eyes to see those conversations and transformations around us. And it doesn't happen easily. Especially like, you know, get you heard in my own witness when I did my introduction. You know, I encountered stewardship for all seasons when I inherited before to life Lutheran Church, and Clifton in Fairfax, Virginia, Northern Virginia, half million dollar a year mortgage payment, and I was just in crisis. My predecessor chose not to do another capital campaign and left me with a totally underfunded mission and I had to figure out how to do that. So when I did stewardship for all seasons, we didn't start with why. I mean, I did because I'm a vision catcher caster kind of naturally, it's just kind of who I am. But so I did work at that, but I don't think I understood just how important the storytelling piece was back then.

And I wish I did and it wasn't a feature of stewardship for all seasons back then like it is today. Deacon Mitzi Schaffer, my partner GSB has really taken this conversation around it and made it Central. She now comes in and does communication audits with congregations. But the why piece changes things and Mitzi comes to this conversation from the outside. Working not primarily with congregations but with nonprofits and helping them to tell their particular stories of impact in new ways. And then watching, of course, the whole, the whole participation picture for those organizations change as constituencies and donor bases, understand what the organization is up to why it matters, the way it's changing the lives of people around it. So that when, when opportunities to, to provide additional resources emerge and invitations, that people are way more likely to write checks in significant ways to re re reallocate resources for support, because they understand why that organization, it why it existentially why it matters. So we have to congregationally start with why. And so, by the way, what I hope you're starting to see is now we're not just talking about stewardship, at least as its classically defined to me, my favorite favorite definition of stewardship is stewardship. And I remember who said that somebody on this call will know this. Stewardship is everything we do with our lives after we say yes to the Lordship of Jesus the Christ. I know that sounds probably a little decision that's for this Lutheran matrix, but but it still works for me, the reallocation of resources of life to support mission in light of the Lordship of Jesus, I think, I think that works powerfully. So the why conversation is not about resource reallocation fundamentally, it's about how do we reorient our lives to something that has ultimate meaning for us, then that's the story of the congregation. I mean, I hope you you pastors in particular nodding at this, right? Somebody should be saying, Nathan, well, duh. And so why are we better at telling the stories and part of it is we weren't trying to. There's a methodology that seems really basic, I'm going to train you on that give you resources for that here and this conversation. But it starts with why Simon Sinek said something in his famous TED Talk to fundamentally, you heard me say this earlier, we're not in the business of raising funds. We're growing people. It turns out that fund support and increased resources end up being a byproduct of people who are growing in their discipleship in relationship to Jesus Christ in His Church. They're a byproduct. But our focus is actually growing people. The storytelling helps us do that by how we buy how we tell the stories. Fundamental to this, and this will feel kind of like a non sequitur vibe. But I learned this from from from Itsy Schaffer, my partner, who is just a black belt in this particular conversation. When we're developing people, when we're growing disciples, part of the thing that works against us in the context of the church is most of the communications that come from pastors and come from church offices are functionally emotional withdrawals, not emotional deposits. What does that mean? It means that they're asking for something. They're there. It's language laden with shoulds, and oughts, and not enough stress, and lack and lack and this and that, and all that type of stuff. Mitzi has famously said that when she does an audit, the typical newsletter 80%, or more of the language is fundamentally emotional withdrawal language, which is why people don't pay attention to the communications. So one of the things she does automatically first, and this is related to the storytelling, the congregation or the institution she's working with, is work on how to shift language so that 80% of the language is an emotional deposit. And only 20% of the language is emotional withdrawal, which invites people to pay attention to church communications in a radically different way. And to pay attention to important messages and messaging. Also, emotional deposit language allows people to see understand, celebrate,

and metabolize impact, and the role that they have in that it helps them connect the dots and see how what they're doing in this part of the ministry of the life of the church is an impacting transformation in this part of the Ministry of life of the church, how it all connects together. So it's a fundamental shift. It's hard for I think, for church leadership councils, who are dealing with deficit situations all the time to get their heads wrapped around, because you just want to shake the tree to get all the money out of the pockets. The problem when we do that is we reduce all of the church to a basic transaction. And if you listen to most of the pundits, and their criticisms of it The corporation of the church today, it's because it's because so many pastors and leadership teams, even denominational structures have reduced the life of the Body of Christ to some sort of fundamental economic transaction. Apart from the larger story that we've actually been entrusted with. So we get to play with this idea of the power of storytelling. And how it helps people connect with the narrative we know as human beings, we've been telling stories around fires for hundreds of 1000s of years. I was listening to an anthropologist talk about this on NPR here, this last week, of the role of story and actually shaping not just human community, but human civilization, that without narratives that hold us together, it's hard. It's hard to hold civilizations, organizations, much less civilizations together. So we need a narrative that helps us see understand and make sense of our context, and what it's up to. So. So let's talk about storytelling in two different ways in which you did not get them confused, because in my mind, initially, they were confused. The most basic type of storytelling is something I call, we call it we call generosity storytelling. It's basically why I love my church and why I support it. Now, it sounds like it's really brass tacks stewardship, and it kind of is, but but the reality is even in small congregational context, there's this idea that we all know each other and know each other's stories. And my experience, from my time in small congregational context was that was patently untrue. We know people's names, we think we know them, but we don't actually know them. So generosity, storytelling allows us to lift up the stories of households within the congregation and talk about their connection with the church, their connection with Jesus, and why they're invested in it. It goes back to that principle of mentoring of number one, offering a standard number one and number two, of modeling, stewardship of modeling passion of modeling engagement. So generosity, storytelling, these are really, really easy to curate and cultivate. In the Documents folder that Jim has provided for you, is a Word doc that you guys can take and use in your own congregational context. And it's, I think, simple to deploy. Because you're basically send out an email to 20 households, and you say, Hey, would you sit down and take time to answer these questions, and hopefully they do in a timely manner. And then, because of the way because of the way the questions are set up, it's then easy to curate a form of a written document. Hold on a second, I'm going to mute there. Apologize for that, folks. Okay, let me get my thoughts back, generosity, storytelling, you can send this out people's responses, and they can be easily curated into really synergistic stories about the lives of people. So this example is provided in your in that box with without a doubt story fully fleshed out. So you can see what that sounds like. And I think there's two other samples as well. So you can see, they're easy to curate, and then they're easy then to share with the congregation. I like to see these things being shared, at least on a monthly basis from people in the congregation. Just because again, we like reading about the stories of other people inside the congregation. And people pay attention to these kinds of stories. And, and they're whether they know it or not, they're measured by these things. They change how people perceive not just those other people sitting

in the pew that they didn't know, on a Sunday morning, they change their understanding of what's happening in the lives of those people. So simple questions. One, what were you looking for when you came to our church to what is your first memory of feeling like our church was your church home? Three, what do you appreciate most about the ministry of our church? For Where did you learn generosity? I know that feels like a non sequitur. But it's amazing. How did the how that the appreciation language about the ministry of our church translates easily into a conversation about generosity, why people choose to support the church with financial gifts, and then the greatest hope for the church and the next generation that calls it their church home. They're incredibly encouraging. They're incredibly powerful. Our congregations that deploy these things, quickly start telling us stories. Again, you're doing this stuff, you'll notice there's no ask for money. There's no ask for resources. There's no ask for anybody to do anything. Except just except just celebrate and get excited about the story of transformation and connection in this particular household. That's it. That is pure 100% Emotional deposit. Again, easy to curate, if you wanted to, if you didn't have somebody to curate these things into kind of more narrative, you could, you could share this as a q&a with a picture of the household. For those of you are more sophisticated, this generosity story template, translates really, really well into interviewing people on video with your smartphone, and curating this into a three to four minute clip that can be shown on a Sunday morning. Now, if you're digitally savvy like that, they translate really, really well. And yes, you can and should do that kind of thing if you have the ability to do it. But um, but if you don't, don't overwhelm yourselves, people still read. People still read communications, we're going to talk about when to do communications, because that's an issue. But But, but people still read communications. So that's the generosity story template. The second is what we call impact storytelling. Now, I want you to notice generosity, storytelling, why I love my church and why I support it. Okay, that's different from impact storytelling, which is how God is at work through our church, which are literally stories of transformation, how we see God showing up. And so the format for this, by the way, this is this is Deacon, Mitzi Shaffers format. She has copyrighted it as anchor storytelling. Some of you may have heard of that. Some of you may have done trainings with her. But this is basically the moves of how she constructs the storytelling, it's, it's a little bit more difficult, because it's not just something that you can give people you need an interviewer to go out, and to ask questions and to kind of build copy in a story. But these are even more powerful than the generosity stories, because these really answer the question, why? In terms of the existential question that people have, so what, why church? Why does this matter? Why should I invest in this? Why should I show up and give my time? Why should I raise my children? Here are the kinds of questions that people come with. So the five moves of the impact story structure are identification of the persons that are central to the story. By the way, there are one or two samples in the dossier that I gave him that he's posted as well. So you can see what this looks like in practice. Actually, there's two I know there's two samples to that one of the generosity story to or the impact stories, identification of the persons that are central to the story, one to two sentences, description of person situation before some significant change. Number three description of the agent of change how God worked through some person or elements of the congregation to create a new reality for the individuals about two to six sentences, what the new reality for the person's looks like now two to six sentences, and then how supportive the congregation makes ongoing transformation like that described above possible number five,

you're connecting the dots. Number five, I see congregations will leave that piece off, sometimes, but it's absolutely essential people just write this down. People do not connect the dots.

And we pastor sometimes, and council presidents like to be subtle, we think people will connect the dots. My experience over and over again, is people don't necessarily connect the dots, we have to connect the dots for them. So this is a very formulaic structure, but it can be massaged into really powerful storytelling. That's a page long, no longer than a page, easy to digest, easy to read. And it helps answer the question about what kind of difference our congregation is making in the world today. Now, communication strategies. What I'll see congregations do is they'll take the impact storytelling and the generosity storytelling. And they'll bury it on page three of the frickin church newsletter, which is an invitation to non engagement. So if you decide to deploy intentional storytelling methodologies in your congregations, for Pete's sake, think through the channels of communication really importantly, the newsletter your church newsletter is probably like, like Mitzi finds most of the time. 80% Emotional withdrawal language doesn't mean they're bad. It just means that it's a church calendar. It's where people go to find out when youth group is happening with confirmation is happening when they're on sacristy duty when they are ushering all that type of stuff, whose birthday or anniversary it is this month. It's a tool for getting some basic information. And it's a tool for asking for people to participate in things that you need. It's not a tool for community communicating transformation, and insight. Even though I know I've written tons of newsletter articles for church newsletters over the past 18, almost 20 years now. And even though I like to think that everything I wrote was really fantastic, but that stuff gets buried, people don't read it. So when you share these things, share them as bulletin inserts as a handout on Sunday morning, share them in an email form that standalone like, like, designate it, let's say you were going to do an alternating generosity story, month one, impact story number two, and just create an alternating calendar throughout the year, six of each, over the course of a 12 month period of time, designate the third Thursday at 2pm in the afternoon, to be when you send that particular email out. People will learn you can educate, hey, we've got different kinds of stories coming transformation and impact, they're going to come on the third Thursday of the month at 2pm. Look for them, you can narrate that from up front, for those of you in leadership and congregational contexts, and invite people to get excited about that. And then people will begin to anticipate and look for that email. And when they see an email, that's a story of transformation, connection, and life, they will begin to look forward to it, your your opening rates on those will be astronomically high, because there's nothing else associated with it. Do not attach any asks to that. Make that a standalone space, but find unique ways to communicate that stuff. If you're doing those talks. If you're translating those, you could share obviously written stuff in social media as well. But if you're translating those things into video content, that stuff can be distributed digitally as well. You can do digital emails, even have YouTube videos that have been pre recorded? I'm not Thursday at 2pm. Why do I say 2pm? By the way, we know that there are times that people look at emails. So if you want attention to an email, you need to send it at 6am in the morning. Because most of us have a bad habit of rolling over and looking at our smartphones. First thing number one, but we're most likely to see

correspondence then we're at 2pm. After the sugar low after lunch, we get back to our desks when we're really kind of done with our days. And so we start going through our personal emails. So that's when opening rates get astronomically high, and then 5pm, the commute home. Those are the three times a day that if you want attention to an email, you should send an email. So think about when you're communicating these things. And when you're communicating stories of transformation, make them stand alone. Do not bury them in tons of other content that is an invitation for non engagement, non participation of transformation. Final thoughts? Stories are the only lever we have to shift culture. They're how we help people see the reality around us differently understand why things are mattering, connect the dots and and begin to shift people's participation make the case for why engagement is important. And so when we're talking about global generosity, strategies, it all begins here more than anywhere else. There are plenty of other ways to do storytelling in congregations chances are you already doing many of those things. Maybe you're doing something like what we've articulated, articulated here already, that's fabulous. So just think about communication strategies. Are those things buried in other things? Are they are they clear? And then you know, what kind of feedback mechanisms do you have to listen for impact but but think with intention about the story you're telling. And if you can build a comprehensive vision and calendar for that, that's essential, but it's important that you're doing these things? Well, prior to any sort of annual appeal capital campaign you might do. This is the foundational conversation, that all other initiatives that happen inside of a congregation can be built upon. These are the foundational pieces that everything else can be built upon. Our story. Our narrative is fundamental to our identity life together. So it's why we start here. So let me stop there. And let me bring us back together. Big Screen. Brady Bunch view gallery view so we can see each other's faces come back and dialogue with me. Questions, comments, thoughts?

SESSION 3 | THINKING THROUGH THE ANNUAL APPEAL

People will not be invited if you don't do it with that kind of intentionality. So that's kind of the bad news. So with that said, How do you even begin to think about an annual appeal? Well, begin with the end in mind. That's where we begin as a firm. So I know, I know, most annual appeals, people are thinking about, well, we have \$70,000 deficit, we need to get over \$35,000 deficit we need to get over. So let me start with this slide. First. What you need to know fundamentally is people do not change their giving to maintain current realities. So your church deficit is not motivational for anybody. Except for you, the pastor, and probably the council president, and the treasurer, and maybe the finance person who was write the checks. People change their giving to obtain new realities to say this, again, take a screenshot of this, whatever the case, may be, people do not change their giving to maintain current realities, they change their giving to obtain new realities. So that's why we begin with this vision conversation. And the most basic way to do it. In fact, this is this is the old GSB methodology. I don't like it, because it starts with dollars and cents. I think it's the wrong place to start. But I would teach it to you because it may be applicable and still helpful for some of your context. How much more money will you ask for in 2025? And what ministry will happen because of that? What it asks is that you actually reverse the questions.

What ministry does God wants to have happen in 2025, and how much more money we need for that. What ministry needs to happen in 2025, that's perhaps not current or current not currently occurring, and how much new money are we going to ask for, and then you take that, and you add that to the conversation about whatever the deficit needs are. So in general, if you don't know how to figure out what your strategic priorities for the coming year need to be, here's three ways it a basic, very pragmatic way to think about it three targets, an internal target for growth, let's say, you want to find a halftime youth person to steward the Children Family and Youth conversation in your congregation. And that's going to cost you \$40,000. That would be an internal growth, target external growth target greater supportive and participation with the local food, food bank. And the support part is an additional \$25,000 in resources in addition to being responsible for two more nights a week with volunteer support, right. And then the third thing is sustaining ministry excellence, and that is, we have a \$35,000 deficit, we just need to sustain at a current level, we just need to sustain this, this is the dollar. So we need, you take all those dollars and sits together. And that's the amount of new money that you need for 2025 to do the mission you feel like you've been called to do. Now, here's the psychology of an internal target and an external target.

And let me just start preface this by saying you do not lead with a sustaining ministry excellence because again, people do not change your giving to maintain current realities, those other two targets are going to be essential. Now inside of every congregation are people that are chronically grumpy about every dollar that goes outside of the doors of the congregation to support people and missions that aren't local. So those people, they will be activated by those internal targets. And then you've got people that feel like not \$1 incentive they're giving should be spent for anything inside of the four walls of the church. They resent the pastor salary, they resent staff salaries, they resent paying for lights, they resent the mortgage, every dollar of it.

But you talk about supporting the local food pantry, they're all over it. And in fact, they'll increase their general fund giving because you're supporting those things. So now you've given that person, that type of person, a reason to give, and then a sustaining ministry excellence, just because we need to as congregational leadership ever keep in front of our congregations, that our basic existence is not supported by everybody's hobbyhorses, but because we have these communal resources that are brought together so that we can have this communal experience that involves this space that involves lights that involves technology that involves excellent staff to help equip and empower this stuff, etc. So three targets if you didn't know how to put those things together. That's my basic coaching For congregations trying to figure out how to organize this, and this often gets people off of point that they don't have a strategic planning process, strategic targets already identified, this is a really good way of getting that stuff. And I see great, great success with that. Very, very pragmatic.

So, again, I introduced the identify, inform, inspire, ask and thank you. Before, we're going to talk about this, again, identify who is here. So this is a database question, who needs to be a part of this, your donor base isn't just your membership. It's a constellation of people that are involved invest in and connected to your congregation that's larger than your actual membership. So making sure that your database is clean, updated, and accessible and ready to go is really, really, really essential, especially for some of the fundamentals related to giving because personalization of asks isn't possible without really good database management, knowing what people are giving, knowing where people are, who people are, etc, who's connected with who, today, how many households have people who have two different last names, it's increasingly common, connecting people together. So you're not giving one household two different asks, but your database for stewardship, at least identifies this household with these two individuals, so that you can do something appropriate for them, etc, etc. But you need to identify and clean that up. I'm seeing even with very, very small congregations anymore, more and more of our small congregations are using really good database services.

Because there's more and more web based platforms out there that do a wonderful job of this, making, updating membership information, religious membership data, data management, Eric was talking about the data management system that he uses, and how that's changed how he communicates quarterly statements. But it makes quarterly statements easy. It's just it's they're a game changer. So if you haven't considered something like that, for your context, consider something like it just makes everything that you do, not just with fundraising, but everything else in the church that much better. So you need to identify who's here, how they're connected to the church. And understand that when it comes to running an actual annual appeal, the annual appeal, appeal will include a donor base that's larger than your membership. And that's okay. We want to inform. So once you figure out those strategic priorities, you can begin to build content around the priorities for the campaign, you can give it a theme, you can give it a name, it should have a theme and a name, I'll get asked all the time, is it important for an annual appeal to have a logo, not necessarily, I think, three quarters of my essays congregations down to a particular logo, and they have perfectly fantastic results. And quarter, you know, does like to do logo development, it's gotten easy to do that. Sometimes you have professionals inside of

the congregation. If you're not familiar with design crowd, it's a wonderful way to crowdsource that stuff with an international poll of artists. And it's a low cost. I mean, it's been 250 bucks, you probably get five or six different logo ideas. They'll work with you getting them refined, it's it's fantastic. So it's not expensive to do these things anymore. And as Theresa pointed out, many of us are just getting on Canva and designing things anymore. So designing identities for these things, is really, really simple to do. But you need to inform people, what's the theme? What are the goals, you need to do an introduction letter. You need to build a prospectus that helps people understand what the mission of the church is, what the opportunities for mission in the coming year are, and what the invitations are going to be how the money is going to be used. Usually in a prospectus. We include something like a giving chart that helps people locate where they are in the giving journey.

Number one, and number two, they usually has a secondary bar chart overlaid that shows the number of gifts that you need in each category. To achieve the goals. Let's say that you had an annual appeal and your goal was to grow by \$75,000 in New giving, for this coming year to fund not only the current mission and ministry that you need that sustaining ministry excellence piece, but these other two strategic priorities that you needed, you'd want to talk about it, you'd want to talk about it there and help people see how people taking simple steps actually adds up significantly and makes big numbers across the whole congregation entirely manageable. What people normally discover is when they take those steps, nobody actually has to do anything sacrificial for the church to meet its financial goals. Let me say that again. In most cases, nobody has to do any He thinks sacrificial for the local congregation and meet its financial goals. People just need to participate and engage. So perspectives are a part of this inform mailers worship handouts. So that we really believe that I mean, from a basic level, you need a four-week process for an annual appeal, if you're doing a special appeal, it was probably five weeks, and a capital campaign at six. But for an annual appeal for weeks, and the reason is you're educating people over time, and, and inspiring people over time to the goals and the needs of mission and ministry for people to encounter in a different way. And you don't want, you don't want the asks, I'll talk about in two slides, you don't want those asked to come until later in that appeal cycle. Because if you ask too soon, you don't get the kind of resource development that you do when you ask at an appropriate time after people are appropriately informed. So how you laid this stuff is out is really, really important. You need to create response mechanisms, response cards, all that type of stuff that can be sent out in a prospectus packet, towards your last week of, of the annual pain campaign. And then, of course, special emails, curated videos, additional kinds of things you might want to do. But those first five things are basic in informing mechanisms that we use as a firm across congregationally. They work in every context. If congregations have the ability, and the time, the energy and the resources, six and seven often get added on as a part of that information strategy throughout the annual appeal, inspire beyond just information, answering the question why these things are absolutely essential and really matters essential. So you know, Temple talks may be a way to do that testimonials. curated videos, like Theresa was talking about are an excellent way for, for the goals of the annual appeal to be highlighted number one, but number two for people to get fired up and excited about the congregation to fall in love with it again to to understand the impact of Christ in their lives and the life of their community again. So that's a wonderful way to

get some inspiration going. leadership gifts, we work really, really hard to have leaders weigh in on how they're going to financially support the annual appeal ahead of the congregation. So leadership, Council, and staff and other important lay leaders inside of the congregation will often get their ask letters first. So that a week ahead of time, those results can be tallied. And when you're talking about, you know, a \$75,000 annual appeal goal, you can stand up on the weekend that the Ask letters are being sent out and saying, Hey, as you're being invited to respond to this, we want you to know that the leadership has bought into this and of the \$75,000. We need to raise to make this mission and ministry vision happen for 2025 25,000 of that has already been provided from the leaders who have already turned in their Statements of Intent. That's inspiring, we've gotten a third of the way just by leaders showing up doing their thing. So that can be a way to do it. Getting people in Cottage gatherings and focus group conversations talking about why these things are important with gifted facilitators can be another way. And you all probably have other mechanisms and strategies for thinking through inspiration related to annual appeal processes. But what I want you to start saying is this inform, inspire, ask and think they're parts of moves. And you can't skip any one of them. They work together. But they build on each other. And they have to work in concert. So let's talk about asking. The largest gift I ever got for capital camp B was under \$50,000 gift. And Mike Ward, our Managing Partner equip me to know how to do this and I sat down with his family at a restaurant and got 150,000 In my previous capital campaign and didn't use GSP for that. But that was a gift that a family just came up and said hey, we want to do this amount. And if I had been equipped, I would have been equipped to go back to them and say I think you can consider a gift of \$250,000 Would you consider that? And I think they would have said yes. But I wasn't equipped to do that. So I didn't do that. So this is my first official big gift ask I sit down with the family and I say our names are John and Bunny John and Bunny. Your poly I think one of three households in the congregation that can entertain this gasket at this ask and you guys have seen a giving pyramid before and you know how this stuff adds up. Oh Um, would you be willing to entertain making a gift to this capital campaign in the range of 100 to \$150,000. And I remember John sitting back and saying, Nathan, I can't tell you a pair peon. That's what they call me pn, I can't say how appreciative I am of this conversation. And I'm like, I just asked him for \$150,000. And he's saying he's appreciative. So take note, he was appreciative. John and Bunny got asked for money all the time. The gift of this conversation was, I told him what we needed as a church to be successful in this capital campaign to accomplish that particular mission. He knew how to show up for us. He said, I appreciate this, because I know what you need from us. He said, You remember in the last capital campaign, you got the biggest giving households 20 or so of us in a room in a nice home together, and you told us what the goals were. And you basically said, y'all give, do what you can. And he said, So we picked a number. And the number they picked for that capital campaign was \$50,000. I left \$100,000, at least on the table, because I didn't ask for it. Because I treated them as its general conversation and said, You all do what you do. And I think about the number of times I've stood in front of the congregation said y'all give him rather than asking the question, Who can entertain what asks, and what can we recently asked for? And let other people that those folks say there Oh, no, if they need to, for whatever reason. So asks, they need to be personalized, not general, they need to be specific and appropriate to the household. key principle asking is actually an emotional deposit and not an emotional withdrawal. Because we pastors in particular, are not trained in this conversation,

we feel like making an ask is somehow always an emotional, emotional withdrawal. But the truth is, we find and this is why personalization of apps is a part of our process at GSB. Pastors are nervous as long tail cats and rooms full of rocking chairs. When it comes to asking people for specific amounts, we find overwhelmingly like to the tune of 98 99% of the time, people appreciate it, because it gives them a target to know what they might do or entertain, to help this effort be successful. When you just make numbers up, or you treat everybody the same. Nobody hears themselves in that conversation. And so everybody thinks, well, that person will respond. They weren't asked that I wasn't particularly asked, this isn't meant for me. So asking, it needs to be personal. It needs to be specific and appropriate to the household. And we need to understand as leaders, when we give people specific targets that are appropriate, specific and appropriate to the household. That is an emotional deposit, not an emotional withdrawal. It's an asset. It builds trust, authority, and it improves outcomes in terms of the actual appeal, astronomically. Talk about thanking nonprofit, industry standard of acknowledgement of a gift is 48 hours, 48 hours after a pledge has been made or statement of intent has been turned in.

Most churches don't do that. I've gotten most of my churches to do a basic acknowledgement week, the week within a week, which is I think, pretty good. But the nonprofit standard is a 48 hour turnaround. That's a non profit, benchmark for excellence and success. This is why I think the nonprofit world and conversation with the church is helpful, because it has a higher ethical, responsive barre than the local congregation. There's a lot for us to learn there. So acknowledgement of receipt of statement of intense 48 hours, handwritten expression of gratitude. My coaching is usually within a week is ideal. And handwritten is important. And then celebration is a part of the thinking move celebration of the corporate achievement when you run an annual appeal. See churches do this all the time. There's never any feedback loop. How did it actually turn out? What do we actually get? What's that going to make possible? So I mean, it is it is entirely possible that you run an annual appeal, you needed to raise \$150,000 like I always did a lot of life and and you got 120 new pledges. Well, you know, I'm looking at the deficit going that's not gonna help us get over this. But \$120,000 in New giving is a win. And I just remember my work slapping me affectionately upside the head and say, Nathan, this is a win, celebrate the win. The congregation responded and what I couldn't see. And he didn't actually coach me to anticipate is, when you're talking about Statements of Intent, returned an annual appeal processes congregations. That's just from the people that will return a statement of intent. Eric, you're smiling right now. Right, that there's your pews are filled with armoury people that for whatever reason are not going to turn in a statement of intent. But they sat through the whole annual appeal process. They read the materials, they were inspired by the temple talks, and they're going to adjust their giving anyway. So what I saw as beyond what we could see on paper, was the increase that was pledged to the congregation. The actual giving was even higher than that in the new year, because people responded beyond what they would even let us see. There needs to be a celebration of the corporate achievement. Sometimes that's hard for us as leaders to say, well, it doesn't look like we met our goal. But the truth is growth is growth folks, and it needs to be celebrated. And it needs to be the feedback loop of having the congregation have the opportunity to celebrate and see how people responded for your current budget, or like nobody else would support this congregation, it's important for them to see how many people are actually bought into the mission, they can sometimes thaw a

really cold heart. And for everybody else, it's just that winsome feedback loop that thanking motivates people's attention, and engagement and creates, again, a whole new sphere of possibilities going forward. So identify, inform, inspire, ask, and think they don't all happen at once. But they have to happen in conversation, working together to produce really, really robust, good results. Now some pro tips, because I'll I see this stuff all the time. And inside of congregations, these are the things that you can do to just make sure that there's a sense of professionalism, and quality to annual appeals, people's expectations of the church are really low. Don't send your communications out related to the annual appeal as bulk mail. I see churches do this all the time to save a penny. Number one, bulk mail doesn't show up in a timely way. It just doesn't.

So you have timely communications related the annual appeal, you sent them bulk mail, and they show up after the appeal process is done. And you wonder why nobody responded. Well, there's a reason why. So send all of your communications first class mail. Well, that cost money, Nathan. Yeah, it does. But it will return, you'll get a return on your investment. Number one, number two first class mail communicates that that communication is important. Just because it comes from your church doesn't mean people will open it. And if it's sent bulk mail, what do we do with the bulk mail that shows up in our boxes? I don't open that stuff to you. I just dump it in my mailbox. So bulk mail is permission for non-attention. So if you want attention to correspondence, and yes, snail mail is essential to annual appeal processes. You can do email stuff too, but do not do not do the actual snail mail communications are still essential. Make sure it's all first class number two professional design. In all deference to those of us who can do decent Canva. It's amazing what some basic professional design and attention to things like Statement of Intent cards, the return mechanism to a prospectus. That stuff I mean, letters, ask letters and, and letters of introduction to the annual appeal that can be done at church letterhead, that's fine. But having professionally designed pieces that have that have pictures of the faces of your congregation where people can see smiling eyes, professionally laid out and done clearly communicated, helps you in your efforts. So don't skimp on that. Everybody's got a cousin Johnny in the congregation who does some design work on the time. Can I tell you the number of times I've seen cousin Johnny's work, and it's been crap. Don't do that to yourselves, find a really good design shop. They're becoming less and less expensive all the time. And again, you'll get those resources back and people's responses because people pay attention to quality. By the way, we live in a universe of multimedia communication, where the bar the bar for quality is incredibly high. So if we want people's attention, even in our small context, now this is increasingly important. Think about the professional design pieces. Last but not least, the most important skill church offices can learn is called mail merge. It's where you take a date at Ace spreadsheet, Microsoft Excel and link it to Word documents so that a standard letter can be personalized to every household and asks can be personalized the whole nine yards. It's just amazing to open up a letter from your church that says Dear Nathan and Aaron, you know, dear pollen, Susan, not friends in mission and ministry or friends of holy trinity or whatever. Because when we send out General Communications, again, that's permission to not pay attention to this and not take it with utmost seriousness. So it doesn't get the level of engagement, that a personalized letter with learning personalization is really, really paramount, and key. And if you don't know how to do that, or your comms person, or office administrator doesn't know how to

do that. There are tons of tutorials on YouTube. Now. It's not difficult to learn. But it's one of those things that if you put it into play, for your church communications, it changes everything. It changes how people see, feel, heard and valued. It's just really, really important. So let me come up for air and see if you guys are still here and awake and engaged. And if not, I guess we'll just take an early lunch.

SESSION 4 | BUILD A GLOBAL GENEROSITY CALENDAR

So let's, let's talk building. Talk about building your generosity calendar. So I preempted this slide with things I've already been talking with you about Kristin Stacy, team, the elephant in the room is that when you start looking at everything that might be possible for running effective communications and stewardship. It is, it is entirely overwhelming. There's just a lot of stuff. What I hope that you begin to see is a lot of the dimensions of what might make up a stewardship calendar are actually dimensions of just good organizational leadership. And they support the overall mission and ministry of your church anyway. So some of you have those administrative gifts. Some of you have those leadership gifts, some of you don't have those administrative gifts, and when you don't have those particular leadership gifts, and that's okay, the question is, given what you do have access to what can you begin to develop and put in place to shepherd these conversations and faithful ways at the level that is possible inside of your contexts? So how do you eat the elephant? One bite at a time. So So thinking through this stuff strategically, so to that end, you do need a team, or you need to start thinking about building a team. So I'm grateful to those of you who brought people today for this conversation. And for those of you who are already thinking about how to share this with stewardship teams, if you already have stewardship teams built for those of you who still need to build teams, or deeper teams build deeper benches, to to use that list of litmus tests that I shared with Stacy just a little bit ago, that you don't necessarily need to build huge teams look for people whose eyes light up, who were willing to basically show up and work this process with you start small, and you can build on you can add over time. But But again, you don't need the full monty start, start, start small and just build incrementally. And as you build a team, you need a plan. I think for those of us who are pastors on this call most of us are we're trained to not think through how to work with and through other people. Most pastors I work with are poor delegators. Often we craft the plans on our own, and then try to build teams to execute the plans we've put together, I would work that the other direction, I'd find people who are passionate about stewardship, passionate about raising people in faith, passionate about storytelling of the church, and then get their gray matter get their hearts and their minds and their spirits involved in the conversation in this particular conversation, and then see what emerges as priorities as faux sigh. Those folks are an embarrassment of riches, they're going to bring perspectives and abilities to the table. And whatever plan you put together will be richer for the collaboration than anything you might dream up on your own. Especially if you're overwhelmed by this stuff like I was as a pastor in the church, what you dream and see as possible, will probably be limited by your sense of overwhelm.

If you have a team, what becomes possible expands, overwhelmed, decreases, capacity increases, and all of that is a win. But you need a plan. So why would you need a plan around but there's lots of things. There's lots of things to have a conversation about, and a lot of things we haven't even talked about in this. But the menu of things that can be put in a strategic generosity calendar is huge. So we've talked about generosity, stories, we've talked about impact stories. We've talked about, we haven't talked about generosity based Bible studies, when you're going to do that in the year, several sermon series on generosity, time talent drives,

I need to come back to that one because one of the things I hear a lot from people is Hey, Nathan, can't we just put our time talent drive together with the annual appeal? The answer's no. Don't do that. And there's reasons for that. Time talent drive, so if it's not going to happen at the annual appeal time, when might that happen? If that's important to your congregation and development of leaders, quarterly statements, we did talk about that the annual appeal process. By the way, if you break it up by month, what pieces need to happen when like my my saps planning processes start usually in May, by asking those particular questions of leaders. What are the things that we need to be focusing on getting people focused on that sometimes they involve congregational processes with cottage meetings or focus groups, etc. surveys that help mind the Congregation for insight about what seems to be important, this particular moment, some prayer groups to discernment groups, etc. And then you have those things figured out by the time August rolls around. And you can be writing content for prospectus and introductory themes, all that type of stuff for an annual appeal process. But if you break that particular elephant up over many months, a fall appeal isn't something that she tried to put together in September and executed in October, which is what most of us I think, do, and we feel totally overwhelmed by it. Instead, break that annual appeal process up by month, spread it out over six months.

And now you're not drinking from a firehose, you're taken piece by piece, figuring these things out, that fits in with the other missional conversations you're having. And by the time it's time to put materials together, you've answered critical questions, it's a lot easier to assemble those things and then execute on a process. When are the newsletter emails or social media communication is going to go out? What are they going to be around? When are you going to do new donor visitor conversations? I did the new donor conversation there because in a nonprofit, that's what the conversation would be visitors, but visitors are part of that stewardship conversation, not necessarily an invitation into financial generosity. But when do you attend to those things? How does that work in your system?

New members, how are they enculturated into a story of generosity and a culture of generosity, major donor development, there's a unique conversation in their mid level donor development, who the households inside of your congregations that are underperforming. And what I mean by that is their capacity for being generous is way in excess of what they're demonstrating. So how do you grow those folks intentionally, aside from an annual appeal, there's ways to do that. But that needs to be an intentional conversation if you have an imagination to do it, and well to do it. So middle over leveled up donor development, this gift, special gift appeal letters, how many of our congregations suck wind, and at the end of the year, and so, you know, it's it's a truism that 30% of all of the giving, that happens in these United States, happens between Thanksgiving Day. And December 31. People are incredibly generous at the end of the year. So invitations to do special gifts, a 13th month, all that type of stuff often works effectively well in congregational context, but you need to get that letter out. Right after Thanksgiving or at Thanksgiving, with an expression of gratitude, on the one hand, an invitation to remember the church to think about special giving. You're at the end of the year, that's just one example of a special special gift appeal letters or the other special appeals that you might have for other needs inside of the congregation throughout the year. So once that stuff happening, and how do

you stagger that stuff. So that stuff isn't all on top of each other. Part of the reason we really like and you'll appeals whose commitment Sundays are at the end of October, beginning of November, is it gives you some time for some response, before you get into Thanksgiving to December 31.

Because many of our congregations need to do a special mini appeal, then you did your annual appeal focused on 2025. But you still got to finish 2024 strong, and people's memories to be short. And you can do a special mini appeal. If you've got a little bit of space three, four weeks, that's efficient, but planning that stuff out strategically. So things conversations aren't on top of each other is really, really important. I think oftentimes we come into the life for the church, and the church is running five fundraisers at the same time. Now, your congregation may be able to handle the handle that and I'm not fundamentally against running five fundraisers at the same time necessarily. The question is what do you want people to focus on? Because what we do know is at any given time, people's ability to focus on any number of things is limited. So what's going to be important? A calendar helps you put all of this in front of you, helps you to see things at a glance, looking at it from a year perspective and helps you put these things together and annual thank yous. I'm going to talk about thank yous in the last session. So I'm gonna say a whole lot more about that now. But when is that happening? Is there an annual time that you you as a pastor, you as a council president or council person, set aside a month to write handwritten notes or notes with handwritten signs and signatures, expressing gratitude to people who've been faithful and some financial support of the Church throughout the year? And there's 1000 Other things to express gratitude for as well.

So when is that stuff happening? And how do you operationalize that so it's something that gets attention and the warp and woof of the ministry year itself, and then the seasonal calms you know, I usually with my SSH clients, I have them in I have them running special communications around required minimum distributions and qualified minimum distributions just to continue to develop awareness around those things. With congregants, um, towards the end of the year, because people can often get into those spaces, when they realize that there's wait for them to give significantly more to their church. Without paying extra taxes on it tax free, they'll often do it, it makes them excited. So there's a lot of things and I'm guessing that you're looking at this list of 16 things and you're good Oh, and I'm not saying this, this, this and this on there. But pay attention to those things, too. And I know this gets super overwhelming, there's tons of things that you can do, to run really, really great process. When it comes to generosity stewardship development side of your congregational contexts, what I'd invite you to do is, and this is OIC that overwhelm management is look at a list like this and say, These are the two or three things that we in our stewardship team are going to focus on this year. And we're going to do our best to do these three things. Well, what are those three things? Anyway, that's how you can take that stuff, then you see a menu of what's possible, you can add that add your own stuff to that. And then you can start as your own kind of progressive improvement plan, figure out what things you're going to tackle what yours what you're going to add, and see what works together and make this a generative conversation. Stewardship development calendar is an example of this, I think, this PDF fillable in Basecamp, that's GSPs kind of standard template translated well into a slide. So hopefully, you guys can see this, this doesn't have all the things you could add,

you know, obviously, more rows and columns to this if you want it, but allows you to kind of add a glance, see what's happening in October, what's happening in November, what's happening in December, you just drop an extra drop text in each of those boxes. And it's an easy way to see at a glance, everything that's happening with regards to these conversations in a year. So this is a really simple way. To put that together, I've got a friend now. She created for me, a Google Sheets version of this that has a added glance tab that has everything there. And then has special gift appeal letters as a special tab. So I can just see that in the year by itself, new members by itself. Bible studies by itself, sermon series by itself, etc. So I can see that stuff more granularly. And I don't have a sample of that in here. But there's a lot of different ways to do that. Those of you who are data management oriented probably see 1000 ways to make this even more robust and better. knock yourselves out. This simple structure was really simple and useful for me in ministry, as I was putting together my first generosity, calendars, it helped me see things at a glance, and metabolize it, and then also build specific teams for regards to those things so that I knew I didn't have to manage the whole process. I could give the communications pieces to this particular team and I could give, I could give the theme and strategic priorities to the council president and the council. And of course, I'm a part of that as pastor but you see what I'm saying these conversations can be broken up into manageable chunks, and I didn't have to be the center of all of it. So it's an easy way to kind of bring all of those things together. In two conversation. I told you this was short. \

SESSION 5 | ANCHOR A GRATITUDE MINDSET

So let's talk about anchoring gratitude, you've already heard pieces of this conversation. I really do believe that gratitude is the foundation of impact. The expression of a heart of gratitude changes how people hear things, receive things, and also want to participate in things. It doesn't matter your behavioral style. It's the bad thing when anybody feels taken advantage of. And what I mean by that is you ask them to do something, and then didn't recognize their contribution. So even people who say they don't need recognition, will still feel taken. Gratitude helps us manage against those dynamics, helps us see people well recognize people's contributions well and celebrate them in ways that are appropriate for them. I just shared with you this already, sorry, I shared this content, actually sharing the content, the 400 notes of your changed my ministry. I really do think it changed the context. It softened. congregational adversaries, it soften them towards me as a leader. It made conversations that weren't possible in the first three, four years possible. It took people that were moving emotionally away from me and my leadership, and shifted them into a posture of moving towards me. And even more importantly, and this is important for us as leaders, when we're expressing gratitude towards people, it changes our hearts towards them, too. I don't think that can be under emphasized that what gratitude does works both ways. It creates an environment of appreciation where people feel seen, valued, heard and appreciated. On the one hand. It also for you, as a leader changes your ability to see value, affirm and appreciate what others do. And especially if you're not good at that stuff, like I'm an ENFJ, I'd much rather think about reality than observe what's actually happening. I don't know how you're wired, but that's how I'm wired. The expression of gratitude forced me to pay attention to what people were doing and to learn how to celebrate them well. And that was a cue from learning how to authentically celebrate people well, not rah, rah, rah, rah sake. But rah rah that was grounded in what people actually did, the contributions they made and the impact that it had on our congregation or organization. The reason it mattered. Dimensions of gratitude, what annual gratitude expressed to those who regularly support the ministry of the church at whatever level. I used to do this by myself, but then I started enlisting the council to help me January was a month for the expression.

There we go. Jenny, January is the month of my annual expression of gratitude for everybody who financially supported the congregation in the previous year. That just became a standard January practice, and it became a lot easier in my last college broilers church have become a lot easier when I enlisted the help of counsel. We turned it into a party, a red wine and cheese party at Penn's house on a Wednesday evening, and had a blast of the time, shared stories fellowship together and expressed a lot of gratitude. So it wasn't just a profound exercise. For me, it became a profound exercise for our congregation saying thank you to so many people. We've talked about quarterly expressions of gratitude with giving statements. So for Eric's observation, and last observation of the double dipping, when you're sending out giving statements, don't miss the opportunity to include that include a letter, at the very least a letter of expressing gratitude. That doesn't have to be handwritten necessarily, but there should be Thank you somewhere on that document. And if you want to, if you want to take it to the next level, share an impact story. Connect that dot for people help people understand their faithful giving, has empowered, whatever this thing is, it's happening. It's transforming the lives of

people. Three spontaneous expressions of gratitude for the ways that people serve in the ministries of the church beyond financial people are serving all over the place. Build your system of expressing gratitude, whatever that looks like. I've just shared mine with you got stamps here. cards ready to go and catch people catch people growing the game them, catch people, transforming each other's lives, catch people doing the things that seems so mundane and yet means so much. You know, the unsung sacristan who shows up, who would be mortified if you ever singled them out in worship, for public applause and accolades, but they show up soundless they and they set up hundreds of cups of communion weekend week out. And they've been doing it for a decade plus. And nobody sees them do it. But teasing that out. Recognition of those things. I actually had, as part of my goal of learning how to do expressions of Thank you, well, I had a goal of I wanted to write, I wanted to catch. I wanted to write five, thank you so much, catching people doing things that were awesome, and just saying thank you for those things. That was my basic goal. So I set up a system. And that was my goal. And I had a ticker, a bullet journal or a way to track that. And, and that was a big piece of helping me learn how to do that. So it doesn't have to be a lofty goal five was the right number. For me, it may be one for you, that's fine. It may be you may look at one or five and go, what it may be 20. For you, that's fine. I don't care what it is. But think about that spontaneous expressions of gratitude. And how you catch people doing things that are awesome special gifts recognition, have a policy for dollar amounts, given that trigger a thank you. So. So we've talked about pastors, of course, having access to giving records, so that pastorally, they know what's going on the lives of people often shows up in financial spaces first. For some of you, you've actually got financial mechanisms, you can do this as well, but because it's hard for me to track this stuff, but treasurer's and financial secretaries will often recognize when people make gifts that are out of the ordinary for them. So if you could have a written basic policy with those folks, Hey, Johnny, if you see any, any gifts made to the congregation, to our mission and ministry above \$750 in a one time, I want to know about that, let me know so that I can write a thank you. So I don't know what the right dollar amount is for your context, but have something that triggers that conversation so that your treasurer, or financial secretary is letting you know when you can get a special thank you in the mail to those people for whatever that was. And I say \$1 amount. And I also say out of the ordinary because you've got folks who are not people have means and that \$5 A week may be a stretch for them. And all of a sudden they drop \$500 in the offering plate. And that doesn't meet that cash threshold for recognition. But the treasurer that the financial secretary might know, that's exceptional, and let you know. And you can write thank you for that. You want to catch those things, and have mechanisms for catching those things. So that people can be celebrated for the ways that they're stretching to support the mission and ministry of the church. Again, how do you catch people being awesome, and you want to catch people being awesome financially to that gratitude, creates inspiration, motivation, and feeds that cycle. Know how to thank people appropriately. Number five, again, you know, I'm a, I'm a verbal processor. And, you know, I like being up front and thinking on my feet. And I liked celebrating people up front. I learned, though, through my work and behavioral coaching, that not everybody wants to be called to the front. And once a standing ovation, some people are totally mortified by that. And when you do that to them, they won't serve anymore. Because if they know that serving means that they're going to be embarrassed up in front of their church, and they're just not going to show up anymore. Now, I would never get embarrassed by being

invited to the front of the church. But that's me and not everybody's wired like me. So knowing how to say thank you appropriately is really important. If you're a big gregarious personality like me or lad, knowing that cloud, I'm just gonna call you out, brother, you know, knowing that there's other ways to recognize people that may be more appropriate than than just singling them out upfront. Lab, by the way, I'm not saying you do that. I've been guilty of that in the past. That may not be the best way to go. So know how to thank people appropriately.

I think that smaller recognition banquets go a long ways, not the full congregational ones. But one of the things that I didn't implement I inherited it at St. Stephen Lutheran Church in Longwood, Florida, was the staff had a volunteer luncheon for all of the people that that made anything that happened in within through the Office possible each year. So they cooked Lunch and they had nice table settings out. And they had appropriate gifts for everybody. And they had these volunteers come in and it was an afternoon serving them. Because it was a smaller, intimate setting. People didn't mind the public recognition. But I gotta tell you, those volunteers look forward to that volunteer recognition banquet every year, it was just huge for them. So there's lots of ways to say thank you. Thank you notes, of course, right. Number seven, never underestimate the power of a handwritten note. That's your that's your that's your go to that's everybody's go to. It's just such a powerful thing that always wins.

But there's dozens of other ways to say thank you, appropriately for the people that are in front of you. But if you begin to think about how to express gratitude, how to nuance that everybody wins, so I just offer that for your consideration. expression of gratitude. Gratitude is fundamental to generosity. The expression of gratitude is fundamental generosity. And I think actually the expression of brat of gratitude or expression, expression of generosity actually begins with gratitude and appreciation of what we actually have. Right? They feed each other are a part of an ecology of grace that operates I hope inside of our congregations and then hope and I hope inside of the lives of us as leaders and leadership. So let me stop there.