

Build Your Team

Establish the Foundation

Invite People to Give

Outreach to Your Community

Thank and Report

Education for Mission and Stewardship

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Encouraging Financial Stewardship

A checklist of ideas for your congregation

This checklist can help you develop a plan to encourage financial stewardship in your congregation. Don't be overwhelmed by this list. Assess where your congregation is at, choose an area you would like to improve, and decide what you can do now and what you will try later. Choose areas your congregation would enjoy and have fun doing. Think of this as more of a "*fun-sheet*" rather than a "*work-sheet*."

Build Your Team

A team of people with a variety of skills and talents can really help move your stewardship plan forward. Look for people with a heart for mission, brainstorming, collaboration, discernment, and follow-through.

- ☐ Do you have a stewardship team in place?
- ☐ Do you have a planned-giving team in place?
- ☐ What gifts, talents, skills, and experiences does your team already have?
- ☐ What do you need to round out the group?
- ☐ How can the team see the work as a ministry opportunity rather than as a task to be done?

Establish the Foundation

Remember, stewardship is primarily a spiritual matter concerned with all of life, not just a financial matter. Any strategy needs to be built on a strong biblical understanding of stewardship. An important part of stewardship is about how people grow in their faith, and how they respond to that growth. The most effective, spiritually-cen-

tred financial campaigns consistently focus the core of their programs on the joyful transformation of the giver in giving, and not on the need of the church to receive.

- ☐ Is your stewardship ministry rooted in a clearly articulated theology of God's abundant grace?
- ☐ Are you teaching stewardship as a way to discover the joy of generous living and giving in Jesus Christ?
- ☐ How do you talk about stewardship in your congregation? What language do you use? Do you talk of compassion and community vs. obligation and commitment?
- ☐ How do you incorporate stewardship into your weekly worship?
- ☐ Do you look at elements of stewardship, other than financial stewardship? How are you helping people incorporate stewardship into all aspects of their lives?
- ☐ Often people give where they are involved. What opportunities do you provide for people to become involved in the congregation - giving their time and talent?

Include Children

It is very important that we teach children about stewardship from a very young age and provide many opportunities to involve children and youth in our stewardship initiatives and planning.

- ☐ How are you intentionally including children in your stewardship initiatives and education?

*A mission-based stewardship campaign asks,
"What is God calling me to do?" rather than
"What does the church need in order to pay its bills?"*

- ☐ What opportunities do children have to give during worship?
- ☐ How else can children participate in worship or the life of the church by exercising their skills and talents?
- ☐ How are you teaching about stewardship in Sunday school, mid-week programs, or Vacation Bible School?

Articulate Your Mission

Remember, money follows mission. Your campaign should be based on mission priorities and should seek to inspire people to give. Look for things that will spark connections and fire conviction.

- ☐ Have you developed and articulated your congregational vision, mission, and purpose?
- ☐ If you have, what mission priorities excite you? What inspires you? How can you share this inspiration with others?
- ☐ If you haven't, what can you do to develop your vision, mission, and purpose in the short term? What can you do in the long term?

Invite People to Give

People give in many different ways. For churches, the Sunday morning offering is the most obvious place where people give to the church. In addition to a weekly or monthly offering, people may give during spontaneous opportunities or special offerings that are planned throughout the year. They may also respond to short-term major campaigns.

Whether asking for an annual commitment, or for support for a special project, pay attention to how you ask people to give. People respond differently to a letter in the mail than to a personal invitation to give. A special dinner may provide an opportunity to talk about mission priorities and invite financial commitments. There are many different programs available that are designed to encourage people to give.

Make sure you are making it easy for people to give. Today, many people will give online, particularly people who once attended a church, or who don't attend regularly. Automatic debit plans can also help people give regularly. The following checklists give you more ideas for inviting people to give.

Regular giving to support the annual budget

Many congregations focus an annual financial stewardship campaign on encouraging people to think about what they might give back to God weekly or monthly. Churches often encourage people to think about what they may commit to give to the church in a year, and challenge them to find ways to increase their gifts.

- ☐ Do you have an annual stewardship campaign to introduce the spiritual gift of generous giving and encourage members to examine their faith commitments?
- ☐ Does your annual stewardship campaign encourage members who are not currently financial givers to give, and inspire current supporters to deepen their spiritual and financial commitments?
- ☐ How do you ask people to make annual commitments? Do you have a letter campaign? Have you tried a visitation program to talk about giving? Have you utilized small groups? Have you had a dinner where stewardship and giving can be introduced?
- ☐ Today, many people are paid electronically - directly into their bank account. Do you have an automatic debit plan (PAR - Pre-Authorized Remittance plan) as a way for people to give electronically - directly out of their bank account? Do you have a way for people who give through PAR to have something to put into the weekly offering plate? Do you promote the program regularly?
- ☐ Have you explored online giving options?

Planned giving

People generally give to the weekly offering from their current incomes - salaries, allowances, or pensions. This is pocket #1 and the contribution is usually part of their weekly or monthly budgets. But, people can also give from pocket #2, their accumulated assets. While people often associate this with bequests (gifts they give once they have passed on), there are many ways to give planned gifts while people are still alive - gifts of property, stock, and annuities. This type of financial contribution is generally quite substantial, long-term, and usually involves some planning . . . hence, it is

called *planned giving*. Generally these gifts can help fund major projects or new and creative ministries. Usually these funds shouldn't be used to cover deficits in annual budgets.

- ☐ Are you inviting people to give financially from both their current income and their accumulated assets?
- ☐ Does your congregation understand the many different venues that they may give from out of their assets - gifts of stock, annuities, etc.?
- ☐ Do you have a clear vision of how planned gifts can enhance the ministry and mission of your congregation and the larger church?
- ☐ Has your session considered joining the *Pro Visionaries* Planned Giving Network?

Special offerings

- ☐ Do you offer special giving opportunities around Advent and Lent?
- ☐ What are you doing for the special Sundays encouraged by General Assembly?
 - *Presbyterians Sharing* Sunday (last Sunday in September)
 - Planned Giving Sunday (any Sunday - suggested May)
 - PWS&D Sunday (first Sunday in February)
 - Mission Awareness Sunday (last Sunday in April)
- ☐ Are you using The Presbyterian Church in Canada's *Gifts of Change* gift guide as a way for people to give special gifts through either special planned offerings or spontaneous giving?

Spontaneous offerings

- ☐ Have you looked at your budget to see if there are items that people may give spontaneously to?
- ☐ Do you invite people to give to PWS&D appeals when emergencies/disasters happen?
- ☐ What other opportunities might people respond to spontaneously?

Short-term major campaigns

Most churches can also usually handle a campaign for a major project that may span two to three years every three to five years.

- ☐ When was the last time your congregation had a sustained financial appeal? What was it for?
- ☐ What causes might have broad-based appeal in your congregation?
- ☐ What target could you set for a major project appeal?

Outreach to Your Community

Members of your community may give to support the work you do. They may identify with your ministry to children or may appreciate an excellent music program. Community members may identify with an international or community project you are supporting - providing clean water, feeding the hungry, housing for the homeless. There may be times when you invite them to worship with you, to celebrate a community event or to support people recently bereaved. Consider how you invite them to give when they are part of your worshipping community. People generally give to projects/programs to which they have connections.

- ☐ Do you invite your community to worship for special events/special Sundays? What might bring people in your community together for worship? Have you invited them?
- ☐ Are there programs or projects that your congregation is doing that may generate community interest and community support? How are you inviting your community to give to work they may connect with?
- ☐ Do you invite community members who participate in your mid-week programs to financially support the work?



Thank and Report

You have invited the congregation and the community into an ongoing mission relationship and this relationship needs to be nurtured. When someone gives, they should be thanked immediately. Then they should be told the impact the funds had. As mission priorities are typically set to encompass a year or more, consider a plan that goes beyond a simple one-shot thank-you.

Note: People respond differently to different types of reports. Consider how you might use:

- Statistics
- Stories of how people's lives were changed
- Goals (Were they met or was there a shortfall?)
- Testimonies from people who have benefited

- ❑ What are your plans to celebrate God's abundance and to thank donors for their generosity?
- ❑ How can you report financial gifts to your congregation? If you have had a special campaign, how do you communicate the results?
- ❑ How are you reporting finances to the congregation? Are you using a narrative budget? How can you show how basic expenses (salaries, utilities, improvements) are essential tools to help meet larger mission goals?

Evaluate

Anything we do is worth taking time to evaluate to see how effective it has been.

- ❑ Have you scheduled time for an annual check-up and evaluation?
- ❑ How can you take stock, and what tools do you have that can tell if you have been successful?
 - Are we growing in generosity?
 - Are people giving in different ways?
 - Are children involved?

Resources Available From the Bookroom

Effective Church Finances: Fundraising and Budgeting for Church Leaders

Price: \$33.95

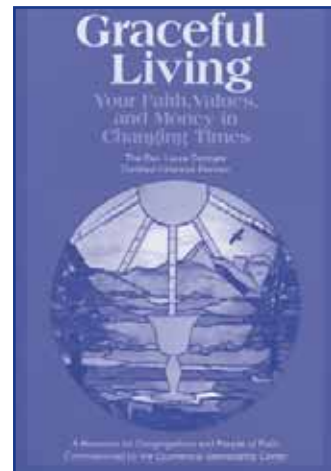
Written by Kennon L. Callahan for committee members, key leaders, pastors, and church staff, this detailed study explores developing the church budget, fund-raising for the budget, setting giving goals for the congregation, and growing giving from year to year.



Graceful Living: Your Faith, Values, and Money in Changing Times

Price: \$10.00

Written by The Rev. Laura Dunham, a Certified Financial Planner and Presbyterian minister, this resource helps people reflect on their attitudes towards money, clarify their values, and develop a comprehensive financial plan. It helps individuals work through their finances so they can see how they can contribute.



The Joy of Generosity: Stewardship Resources for Your Church

Price: \$56.50

This intergenerational resource provides an overall plan to introduce general concepts of stewardship and giving. It would complement an annual financial campaign.

The Whys and Hows of Money Leadership: A Workbook for Pastors and Lay Leaders

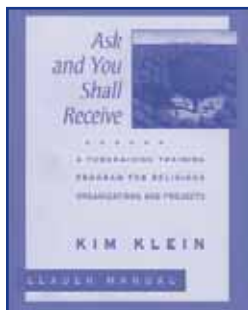
Price: \$20.95

This resource will help get your church talking about money. Seven lessons help participants explore their personal relationships with money, learn about financial planning, and apply their learning to the church. It helps to connect the congregation's mission, vision, and goals with funding and provides sound principles for congregational money management.

Ask and You Shall Receive: A Fundraising Training Program for Religious Organizations and Projects

Price: \$31.50

This peer-led program by Kim Klein provides useful tips and information to help raise funds in the church by walking through the "how-to's" of asking for funds. It includes the most common fundraising scenarios: special events, direct mail, personal connections, and major gift campaigns.



Money Matters in Church: A Practical Guide for Leaders

Price: \$18.99

This book by Aubrey Malphurs and Steve Stroepe covers financial stewardship from articulating your theology of financial stewardship to managing resources and conducting a capital fundraising campaign. Questions at the end of each chapter help provide fodder for small group discussions.

Inspiring Generosity

Price: \$19.99

This book helps you develop stewardship programs. It includes general outlines of four types of annual stewardship campaigns: i) Personal Visits, ii) Consecrating Stewards, iii) Direct Mail, iv) Faith Promise.