The Generosity Assessment: A practical tool for your congregation

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About Lori

- B. Math (Statistics)
- Master of Theological Studies
- D. Min. at Tyndale University College and Seminary, 2014
- Research posted online www.lgreesor.com
About Lori

- fundraising consultant
- data analyst
- theologian
- poet
- donor
- board member
- former pastor
- wife, mom
What I’m grateful for today
Please type in your questions

Moderator will read them out on your behalf, we’ll take question breaks during the presentation and again at the end.
Peach Blossom Church

STORY
What message does the red bag on a pole send?

• We literally don’t want to touch money. We don’t want to see it and we certainly don’t want to talk about it.

• Traditional. “debit be damned” (taken from recent CBC article on Nfld church installing debit machine)

• Scared?
Peach Blossom Church

STORY
Abundance of a Generous God

God’s Grace is Limitless
Scarcity
Never Enough Money
Questions?
Moderator will read your typed questions.
Does this story sound familiar?
In churches, superheroes hold meetings
Generosity Assessment

Fundraising is more than a means to an end: giving can and should be a joyful and community-building spiritual practice.

Christians give in response to a generous and gracious God.

How can churches model the grateful behaviour we seek to promote?
What is a Generosity Assessment?

Congregations can get so caught up in day-to-day finances that they can’t see the forest for the trees. A generosity assessment will help!
What is a Generosity Assessment?

Have you ever wondered:

• How does giving at our church compare to other congregations? Are we ‘normal’?

• What types of people are steady givers?

• What types of people are seasonal givers?

• Are we cultivating younger givers to become mature givers?

• How can our congregation become more intentional and effective in nurturing generosity?
But what is a generosity assessment? What do we have to do?
Initial meeting: data collection, mission/vision questions for survey

Analysis

Giving data

Survey Monkey data

Powerpoint Presentation

Meeting to plan next steps

Coaching
What do we need to do?

- **People**: Some people willing to work together on a generosity assessment

- **Numbers**: fill in a template spreadsheet with one year’s giving data and estimate of that donor’s age. Assign each donor a number – this is anonymous.
  - e.g. Donor 1, $400, 38 years old

- **Survey**: a congregational survey with 2 questions about gratitude and giving (not numbers)
You’ll have more than one donor but you get the idea! This is the input for the analysis.

<table>
<thead>
<tr>
<th>Donor Number</th>
<th>Total Giving Amount</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>400</td>
<td>38</td>
</tr>
</tbody>
</table>
Initial meeting:
data collection,
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Things we are thankful for at Peach Blossom Church:

People are glad that Peach Blossom uses our donations to:
80/20 rule of Church giving

• 20% of members give 80% of the money
Who gives the most?

![Concentration of Giving](chart)

- **Top Givers**: % of givers, % of giving
- **Rest of givers**: % of givers, % of giving
Does giving vary by age?

![Giving Analysis](image)

- % of Giving
- % of Givers

- 0-29
- 30-39
- 40-49
- 50-59
- 60-69
- 70+
Does giving vary by age?

<table>
<thead>
<tr>
<th>Age Range</th>
<th># of Givers</th>
<th>% of Giving</th>
<th>% of Givers</th>
<th>Median Giving Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-29</td>
<td>1</td>
<td>0%</td>
<td>2%</td>
<td>$280</td>
</tr>
<tr>
<td>30-39</td>
<td>5</td>
<td>21%</td>
<td>11%</td>
<td>$1,800</td>
</tr>
<tr>
<td>40-49</td>
<td>6</td>
<td>10%</td>
<td>13%</td>
<td>$1,930</td>
</tr>
<tr>
<td>50-59</td>
<td>7</td>
<td>14%</td>
<td>15%</td>
<td>$1,220</td>
</tr>
<tr>
<td>60-69</td>
<td>15</td>
<td>28%</td>
<td>33%</td>
<td>$3,625</td>
</tr>
<tr>
<td>70+</td>
<td>12</td>
<td>27%</td>
<td>26%</td>
<td>$3,435</td>
</tr>
<tr>
<td>Total</td>
<td>46</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
20% of self-identified American Christians do not give any money to their church.
Peach Blossom Church

STORY
Give because you should give
Giving as spiritual discipline
Now what? We have a discipleship opportunity here!
What is a Generosity Assessment?

Peach Blossom looked at these questions with a new eye:

• How does giving at our church compare to other congregations? Are we ‘normal’?
• What types of people are steady givers?
• What types of people are seasonal givers?
• Are we cultivating younger givers to become mature givers?
• How can our congregation become more intentional and effective in nurturing generosity?
Generosity Assessment

Fundraising is more than a means to an end: giving can and should be a joyful and community-building spiritual practice.

How can we model the grateful behaviour we seek to promote?
• Say thank-you
• Tell stories
• Pay attention
Tools

- Offering
- Online giving
- Pre-authorized giving
- Planned giving
- Narrative budgeting
• Say thank you
  Saying thank you
  Webinar Wednesday December 6, 1 p.m.

• Tell stories
  Sharing your story in a way that inspires
  Webinar Wednesday November 1, 1 p.m.

• Pay attention
  Generosity Assessment tool
  Webinar – this is it!
Tools

• Offering
• Online giving
• Pre-authorized giving
• Planned giving
• Narrative budgeting

Talk to Janice or Karen about the many resources PCC has available to help your congregation!
• Offering

Tools
• Online giving
  Webinar - The Power of Digital Giving
  Wednesday November 15th
• Pre-authorized giving
• Planned giving
  Webinar - Legacy gifts January 3, 2018
• Narrative budgeting
  Webinar – Sharing your story in a way that inspires Weds. Nov. 1
Coaching available to help with next steps

• Helpful to have both encouragement and accountability

• KISS principle

• Can repeat the generosity assessment in the future – did our efforts move the needle on generosity?
Initial meeting: data collection, mission/vision questions for survey

- Giving data
- Analysis
- Powerpoint Presentation
- Meeting to plan next steps
- Coaching

Survey Monkey data
To sign up to participate in a Generosity Assessment

- Contact Karen Plater or Janice Meighan
- Looking for 6 churches available to pilot now
- Room for more churches later
Questions?
Moderator will read your typed questions.
Contact me

• Lori Guenther Reesor on LinkedIn
• lori@lgreesor.com
• lgreesor.com includes links to my blog, writing, thesis etc.
• @lgreesor on Twitter
THANK YOU!