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# **GIFT Financial Stewardship Initiative Continuation Phase**

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CONFIDENTIAL

## Wrap-Up of Active Financial Stewardship Initiative Phase

The Wrap-up and Continuation phase must maintain the same principles as used in the earlier phases of the Financial Stewardship Initiative. These are:

- Person-to-Person contacts (wherever possible)
- Encouraging a pledge (over time)
- Requesting a sacrificial, meaningful and proportionate gift
- Stressing the importance of giving over and above Sunday offerings

In order to attain the full potential of the financial stewardship initiative the following final activities are recommended.

### 1. Decisions Pending (complete! Well done!)

- Make sure that at least 3 calls have been made to the parishioner that has yet to return their pledge card.
- Allow these pledges to come in through the normal method and to realize the additional pledge amounts
- If a response is not received within two weeks, record as a decline. These may still be realized but no further follow up will be initiated.
- Host a Celebration Sunday – end of the Active Phase of the campaign, there are many that have not yet responded and this may prompt them with some reminder calls.

### 2. Continuation Committee

Recruit a Continuation Committee to provide ongoing education and coordinate continuation activities such as, ongoing communication, information sessions, fundraising events and other annual events that may be pursued. This committee should consist of two to four people with a layperson and clergy leading the team.

### 3. Donor Thank You

All parishioners who have given or responded to the “*Growing in Faith Together*” financial stewardship initiative **will receive** a thank you note that expresses appreciation for their response from the Synod office; the Incumbent shall also send a Thank you. This is a thoughtful way to say “thank you” and goes far toward encouraging everyone to continue their pledges.

### 4. Volunteer Thank You

Team leadership and ambassadors are the ones who really made the program work. A special “thank you” to them is an extra step that shows the importance of their work and how much it is appreciated. A volunteer appreciation celebration at the parish is an excellent way of showing this appreciation in a community building manner. This usually occurs about 1-2 months after the Active Phase is completed.

### 5. Other Items for Wrap Up

When all solicitation activity is completed; that is, when follow-up is completed, it will be necessary to ensure the following activities take place:

- Recording all final gifts in your visit tracking spreadsheet and submitting all pledge cards to the synod office.
- Collection of all financial stewardship initiative materials from visitors. These materials should be retained by the parish for future use.
- How will the funds arrive: (**A report without names may be provided by synod office, upon request - please contact Jane Scanlon at the Synod office for these details.**)

Usually the funds follow this approximate formula in campaigns of this nature (net of any bequests):

- Year 1: 30 – 35%
- Year 2: 20 – 25%
- Year 3: 20 – 25%
- Year 4: 15%
- Year 5: 15%

Completing this wrap-up phase of the financial stewardship initiative will enable the financial stewardship initiative to access the potential that still remains, as well as, be confident that all parishioners have had the opportunity to participate.

## Continuation Committee

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It is important that a Continuation Committee of 2 - 4 individuals be recruited to support the financial stewardship initiative follow-up over the next five years. Suggested roles: Recording/Pledge donations, Communication, Leadership (lay and clergy).

### Primary Activities

The Continuation Committee will focus attention on the following specific activities:

- Act as contacts for the financial stewardship initiative.
- Take responsibility for implementing this Continuation Program.
- Maintain financial stewardship initiative awareness. Receive quarterly stewardship announcements from Stewardship & Development Office. Creating, at a minimum, quarterly bulletin and pulpit announcements, - Quarterly Campaign Sunday's.
- Visiting fellow parishioners to update them on the campaign activities.
- Receive/maintain contact with Synod office regarding the pledge redemption process.
- Consider contacting donors who made a one-time gift, if appropriate.
- Contact new families who join the congregation during or after the completion of the active phase of the financial stewardship initiative.
- Arrange and attend quarterly meetings.

## One Time Gifts and Non-Pledge Supporters Accepting Annual Call backs

You will have received one-time gifts from parishioners who preferred not to pledge. That does not mean that they are not capable of making, or willing to continue making, ongoing gifts. At the anniversary date of the donor's gift, the Department of Stewardship will send a letter to one-time donors to ask them to consider an additional one-time gift or pledge at this time.

A parishioners' reluctance to make a long-term pledge commitment does not preclude an annual visit and, in fact, many are prepared to match their one-time donations each year if asked. This is supported with parishioners and secular donors alike. The follow-up calls, letters or visits to one-time givers should commence one year after the start of the financial stewardship initiative.

Due to the confidentiality of donors pledges, many parishes are sending **a letter to all parishioners at the anniversary of the kick-off** to update the parishioner on the campaign plans and results – this would include a request for additional participation to those who gave a one-time gift and any that did not contribute.

There may be individuals who, for one reason or another, chose not to pledge. If the parish maintains strong communication and offers **quarterly envelopes** (in the envelop boxes or otherwise) this can bring additional financial support to the campaign. The following is an estimate of givings that may occur over the next 4 years:

<b>St Michael and All Angels</b>		<b>\$161,768</b>		<b>81%</b>		
<b>One Time and Cash Analysis</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>Total</b>
Estimated Percentages		70%	60%	50%	40%	
One Time Pledges (19)	\$12,570	\$8,799	\$7,542	\$6,285	\$5,028	<b>\$27,654</b>
Cash		\$9,000	\$9,000	\$9,000	\$9,000	<b>\$36,000</b>
<b>Total</b>	<b>\$12,570</b>	<b>\$17,799</b>	<b>\$16,542</b>	<b>\$15,285</b>	<b>\$14,028</b>	<b>\$63,654</b>
	Cash is estimated at 5% of offertory per year					

1. Congratulations – you all ran a very effective and successful campaign!
2. You have 4 people who gave no financial gift this is below average.
3. Your one time gifts is below average at approximately 29%.
4. Your opportunity exists over time, in cash and one time gifts!

## New Families

Every new family coming into the parish should be personally informed about the Case, Financial stewardship initiative and current situation and be asked to make a gift and to carefully consider what their regular support will be to the parish. A suggested approach to these new members is outlined below:

1. Letter from the clergy after 2-3 months in parish.
2. Two ambassadors (from the Continuation Committee) meet with new members.
3. This visit should be handled in the same manner as calls in the active portion of the financial stewardship initiative.
4. The new member should be offered the opportunity to examine the gift chart found in the brochure.

## **Financial Stewardship Initiative Awareness - Mission and Awareness**

During the intensive financial stewardship initiative, the aim was to stimulate parishioners to pledge generous financial support. This was accomplished, in part, by associating the donor directly with the cause. The job during the payment period is to keep this association strong, and if possible, even strengthen it, not only among long-standing parishioners, but also among new ones.

It is neither desirable, nor practical, to attempt to develop the same degree of momentum in the entire post-financial stewardship initiative period as during the actual active financial stewardship initiative. However, careful attention must be given to a planned and deliberately executed program of continued mission and financial stewardship initiative awareness.

***It must be remembered that those who have pledged now have a financial investment in the parish and the diocese. Their interest must be maintained since the continued payment of their pledge will depend on it.***

Good public relations requires that parishioners are continually made aware of the progress being made in implementing the specific programs or projects identified in the Case. Those who have a definite financial stake in the project should be kept informed of the progress in order to maintain their continued support.

### Newsletters

The importance of a quarterly communiqué cannot be overstated. Your Parish must continue to communicate on a regular basis with its parishioners. A newsletter could serve as a tool of communication, which will help maintain the spirit of the financial stewardship initiative for the duration of the redemption period. The Synod office, Jane Scanlon's office will provide monthly updates on the initiative and plans.

Continued presentation of the progress means continued interest – which guarantees continued payment.

### Bulletin Inserts

On a quarterly basis, financial stewardship initiative and project updates should be included in the Sunday Bulletins (sample attached). Points that should be covered include:

- How the parish/diocese has benefited from the financial stewardship initiative.

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*Growing in Faith Together*

*A Financial Stewardship Initiative of Your Parish and the Diocese of Ottawa*

- How and when the funds are / will be used.
- The status of the financial stewardship initiative.
- Total funds received to date.

This allows the parish to show where funds are needed, where income goes and provides a regular opportunity to say thanks again for everyone's support.

### From the Pulpit

Dedicating time to the financial stewardship initiative from the pulpit was a very effective tool in helping to explain the initiative to parishioners. This very effective medium should be continually utilised. Carefully prepared announcements should be made on a regular basis, a minimum of once a quarter, with updates on relevant developments. The announcements should be prepared in writing so that factualness and uniformity are continued no matter who makes the announcements.

### Quarterly Envelopes

Over the life of the financial stewardship initiative, quarterly campaign envelopes can be included in parishioners envelope boxes to simplify the redemption process.

Also, many who gave a **one time gift will consider another one time gift**, those who **pledged will consider topping up their pledge** and finally, those who did not contribute during the active phase may consider **cash donations** as they are able.

This will be facilitated by Jane Scanlon, Director of Stewardship and Development at the synod office. She has prepared an envelope template to be used by your church envelope printer. Sample at: [http://www.growinginfaithtogether.ca/documents/Envelope\\_for\\_envelope\\_boxes.pdf](http://www.growinginfaithtogether.ca/documents/Envelope_for_envelope_boxes.pdf) When ordering your annual envelopes for the next 4 years include a quarterly envelope using the template Jane will provide with the following specifications:

- Dark green colour
- With the GIFT logo in grayscale
- With the parish's parish number on the bottom left hand corner of the envelope
- Parishioner Name, Address and phone number facility on the front
- Parishioner Envelope #

## Summary

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It is interesting to note that the percentage of participation during "Continuation" can approximate the participation percentage realised during the active phase of the financial stewardship initiative. Consequently, the solicitation of new families and reminders to parishioners to use the **campaign envelopes** are important and necessary to offset whatever monies that may be lost through cancelled or delinquent pledges.



## **GIFT APPEAL UPDATE**

The *GIFT* appeal is a five-year partnership between our Parish of St. Thomas and our Diocese of Ottawa, in which church members make special contributions for special projects.

### **Parish Status Report**

Our parish of St. Thomas completed the active stage of our appeal last autumn. Virtually every parishioner received an information package. A great many responded with donations or pledges.

**We've Already Contributed: \$183,268**  
**Our Eventual Parish Goal: \$193,000**

### **Diocesan Status Report**

A small number of parishes completed their campaigns last autumn. Many more are underway now, while others will launch next autumn.

**Contributions in the Diocese: \$2,000,000**  
**Eventual Diocesan Goal: \$12,000,000**

## ***GROWING IN FAITH TOGETHER***

### **What's happening now in the parish?**

The parish is now receiving monthly cheques from the *GIFT* office, as the funds are available. The money is used to pay for our parish projects, such as the new sign on our lawn. The parish can also apply for diocesan *GIFT* grants for some of our projects.

### **What's happening now in the diocese?**

The Bishop's Child Poverty Initiative is already starting to help impoverished families in some of the poorest parts of our diocese. Partnerships with other service agencies helps to identify those children who desperately need regular meals and other assistance. Money is also coming in to help projects around the diocese, in northern Canada and in Africa.

### **How will we reach our parish goal?**

Anyone who would like to join in should look for extra information packages, pledge cards and one-time envelopes in the Church. There are still some parishioners who have not returned their pledge cards, as it can often take time for people to prayerfully consider their involvement.

### **What's next?**

*GIFT* is a five-year appeal. St. Thomas has now reached 95% of its goal and there is plenty of time for other members to join in and help out. We should take pride and give thanks for our success so far!

