



PROJECT  RESOURCE

Day 1 | June 25, 2019
Crown Plaza Resort / Asheville, NC



PROJECT RESOURCE

Day 1

Day 1 Schedule

Tuesday, June 25, 2019

Crown Plaza Resort / Asheville, North Carolina



| | |
|-----------------|--|
| 10:00 am | Welcome & Introductions, <i>Mt. Pisgah Room</i> |
| 10:30 am | Opening Eucharist, <i>Mt. Pisgah Room</i> |
| 11:30 am | Money: Unlocking Our Hearts, <i>Mt. Pisgah Room</i> |
| 12:15 pm | Lunch, <i>Mt. Pilot Room</i> |
| 1:15 pm | Starting with Why, <i>Mt. Pisgah Room</i> |
| 1:45 pm | Generational Characteristics, <i>Mt. Pisgah Room</i> |
| 2:45 pm | Break |
| 3:00 pm | Pre-Work Team Time, <i>Mt. Pisgah Room</i> |
| 4:00 pm | End-of-Day Meditation, <i>Mt. Pisgah Room</i> |
| 4:15 pm | Break |
| 6:00 pm | Dinner, <i>Mt. Pilot Room</i> |

Welcome & Introductions

Notes:

Project Resource Team

Shay Craig

sraig@christcathedralsalina.org

Betsy Jutras

bjutras@collegeforbishops.org

The Right Reverend Clay Matthews

cmatthews@collegeforbishops.org

Mike Orr

mike@episcopalcolorado.org

Erin Weber-Johnson

eweberjohnson@gmail.com

Money: Unlocking Our Hearts



Unlocking Our Hearts

Mission Possible: This Is Good and Holy Work

Theology of Giving

Money Stories

Notes:

Money: Unlocking Our Hearts

Notes:



Question:

When have you been transformed by a gift?

Money & Possessions Are Gifts from God

“All good gifts are sent from heaven above”

“When possessions or money are viewed as mine without accountability, then they may be deployed in destructive ways at the expense of the common good.” — Walter Bruegemann



For more on this topic, see Walter Bruegemann’s book, *Money & Possessions*.

Re-Ordering a Covenantal Relationship

‘I have heard the complaining of the Israelites; say to them, “At twilight you shall eat meat, and in the morning you shall have your fill of bread; then you shall know that I am the Lord your God.”’

— Exodus 16:12

From this Covenant, Comes Generosity

So that all the artisans who were doing every sort of task on the sanctuary came, each from the task being performed, and said to Moses, ‘The people are bringing much more than enough for doing the work that the Lord has commanded us to do.’ So Moses gave command, and word was proclaimed throughout the camp: ‘No man or woman is to make anything else as an offering for the sanctuary.’ So the people were restrained from bringing; for what they had already brought was more than enough to do all the work.

— Exodus 36:4-7

Money: Unlocking Our Hearts



The Pattern of Giving

- Giving as Liberation
- Shifting from Market to Covenant
- Realizing “More Than Enough” (Exodus 36:4-7)
- Sharing/Repairing of the World



Question:

Once we have “more than enough,” we see throughout both the Torah and the New Testament that giving to God liberates us for repair of the world.

Reflection: What do you need to be liberated from in order to do this work?

Unlocking Our Hearts/Exploring Our Narratives

So it is, in the spiritual discipline of stewardship, that when we give our gifts to God through the church, both the act of inviting and of giving force us to confront and acknowledge our relationship with money—our shame, guilt, frustration, fears, and abundance.

And, in this act of inviting and giving, we are given an opportunity to be liberated, to not let these things bind us any longer. The act of giving heals us, and through our gift we participate in the healing of the world. Not unlike the Eucharist, we are changed by love in action.

Notes:

Money: Unlocking Our Hearts

Notes:

What's Love Got to Do With It?

'Teacher, which commandment in the law is the greatest?' He said to him, ' "You shall love the Lord your God with all your heart, and with all your soul, and with all your mind." This is the greatest and first commandment. And a second is like it: "You shall love your neighbor as yourself." On these two commandments hang all the law and the prophets.'

— Matthew 22:36-40

The kind of love Christians practice is love in action.

Fundraising as Ministry

In the Jewish tradition, the theology of charitable giving, *Tikkun Olam*, God gives us the ministry to repair or fix the world.

When fundraising is ministry, as we reconcile ourselves to God, lives are transformed in the giving of gifts to change and repair a broken world.



For more on fundraising as ministry, see Henri Nouwen's book, *A Spirituality of Fundraising*.

Money: Unlocking Our Hearts



Reflections about Fundraising as Ministry:

How do you presently think about, describe, and understand fundraising? What transitions do you need to undertake in order to practice fundraising as a ministry?

Notes:

Starting with Why

Notes:

What Is the Why?



Simon Sinek
"Start with Why" - How Great Leaders Inspire Action

- The Golden Circle

What Is Our Why?

- Use "Why" to think about your church
- Incorporate "Why" into every donor interaction
- Tell stories... over and over and over

Use Why, How, and What to Think About Your Church

- Values (why we do mission)
- Ethos (how we do mission)
- Practice (what we do in our mission)

People don't give to your church because you "do church." They give because they've connected with your mission, not your mission statement. They give because you've communicated the *Why* of why you exist.



For more on this topic, see Alan Hirsch and Dave Ferguson's book, *On the Verge*.

Incorporate Why into Every Donor Interaction

- Invite donors to worship
- Invite donors to give
- Invite donors to serve

Starting with Why



Invitation to Worship

Don't do this:

Christ Church has services at 8:00 am (Rite I) and 10:00 am (Rite II). The preaching is great, the music is inspiring, and we're friendly and open to everyone. We invite you to check out a service on Sunday. "The Episcopal Church Welcomes You."

Do this:

We believe God loves everyone, unconditionally. We are a family of beloved children of God. We are imperfect people in a hurting and broken world. You belong and are welcome, unconditionally. At Christ Church we ask questions, we seek to understand our complex world together, we worship together to connect to God, and we serve and care for one another and our community. We invite you to come on Sunday and see for yourself what God is doing through us and to see how you might join us.

Invitation to Give

Don't do this:

It's that time of year again! Christ Church's annual pledge campaign theme is "Love. Care. Give." Fill out the pledge form and return it by Stewardship Sunday, November 7. God Loves You. Love God back with your pledge.

Do this:

Because of God's love, we love one another. We care for one another and our community. Out of our care for others, we give what we have away. Be a part of giving yourself away by making a pledge of support to Christ Church to continue this life-giving work in our church family and in our community.

Share Your Whys

Why invest the time/energy/resources in stewardship/development in your own diocese/church?

Notes:

Generational Characteristics

Notes:



Some Quick Definitions:

“Generalizations make sense when talking about thousands of people, but not when talking about one person — the person you know. Applying a valid statistical generational characteristic to one person is stereotyping.”

— Haydn Shaw

Ecclesiastes 7:10

- NIV: “Do not say ‘Why were the old days better than these?’ For it is not wise to ask such questions.”
- NASV: “Do not say ‘Why is it that the former days were better than these?’ for it is not from wisdom that you ask.”

Generational Characteristics



The Effect of Electoral Politics on Giving: The Emerging Data

- [Non-Profit Quarterly](#), 2016: “New Form of Donor Motivation: Rage”
- [Washington Post](#), November 2016: “Trump’s election inspired millions in non-profit donations”

Episodic or long-term shift?

The Challenge: Relevance

- Large institutions that remain non-political face the challenge of connecting with donors’ values within a shifting fundraising landscape.
- Social justice/advocacy groups are seeing unprecedented giving.

What have you experienced?

Fundraising is a Ministry

“From the perspective of the gospel, fundraising is not a response to crisis. Fundraising is first, and foremost, a ministry.”

— *A Spirituality of Fundraising*, Henri Nouwen

What have you experienced?

Notes:

Generational Characteristics

Notes:

Matures/The Greatest Generation

Born before 1930

- Defined by Great Depression, WWII, patriotism.
- Loyal to the Church; strong sense of obedience.
- Trust government and authority.
- Often make the “converted” group.

Subset of TGG: The Silent Generation

Born between 1930-1945

- Defined by Cold War, rising prosperity, a willingness to sacrifice.
- Value loyalty, conformity.
- Married early and set up the Church as we know it.

MESSAGE: Legacy (“You built this!”)

STRATEGY: Most are converted by visit from authority figure.

The Baby Boomer Generation

Born between 1946-1964

- Defined by idealism and freedom of 1960s.
- Highest divorce rate and 2nd marriages in history.
- Reject establishment and routines.
- Self is more important than the group.

Generational Characteristics



- Need information on impact/how gift will be used.
- Need for transparency in light of mistrust of institutions.
- “The American Dream” was promised to them as children and they pursue it.

MESSAGE: Prioritization of charitable giving.

STRATEGY: Narrative budget, drop any language of obligation, impactful storytelling. Have ACTUAL recipients of giving speak. Appeal to their idealism. Could your parish be where they spend their “third age?”

Generation X

Born between 1965-1978

- Defined by individualism, single parent households, seeker generation, Watergate, energy crisis, dual income families and single parents, first generation of latchkey kids, Y2K, activism, corporate downsizing, end of Cold War, mom’s work.
- Coupled later, entrepreneurial, cynical of authority.
- The first generation NOT to do as well financially as their parents did.
- Will move or transition jobs 5+ times.
- Wish to “experience” church, though may not attend regularly.
- Experience tied to giving.

MESSAGE: We are a people/community who care about each other. Put individuals in front of ministries.

STRATEGY: Year-round thinking on giving. Don’t just focus on the Fall. Allow them to work independently for your agency and on their own terms.

Notes:

Generational Characteristics

Notes:

The Millennial Generation

Born between 1979/80-2000

- Children of divorce, they celebrate diversity, socially conscious, digital media, child-focused world, school shootings, terrorist attacks, AIDS, 9/11.
- Parents are advocates and friends.
- Givens: DEBT! and technology.
- Pew Research claims giving characteristics are similar to Greatest Generation.
- First generation of “scheduled” children.
- Mentorships/relationships affirm their decisions.

MESSAGE: Your gift is important and will impact lives. Now, how can we get to know you?

- 83% own a smartphone and the majority prefer mobile-friendly websites.
- 59% prefer news or action-oriented websites with quick informational links.
- 49% are more likely to give when they know how their gift will make an impact.
- 57% like emails that contain a calendar of upcoming events.

STRATEGY:

- Immediate gratification of giving.
- Online community presence.
- Online stories of impact.
- Use them for focus groups, ask their opinions.
- Put them in charge of using technologies for appeals. No long appeal letters.
- Utilize their networks. Have them plan events that interest them.
- * “Mid Century Modern” is cool again.

Generational Characteristics



What's Next: Generation Z/Boomers

Born after 2001

- In 2006 there were a record number of births in the US, and 49% of those born were Hispanic. This will change US demographics in terms of behavior and culture.
- The number of births in 2006 far outnumbered the start of the baby boom generation, and they will easily be a larger generation.
- Since the early 1700s, "Smith" was the most common last name in the US. Now it is "Rodriguez."

Targeted Formation

- Lose the 100% mentality.
- Identify growth potential.
- Determine the "committed" in your parish.

Notes:

Generational Characteristics

Generational GIVING

Each generation has unique characteristics that make its members more likely to support different causes. When you understand the behaviors of each generation, you can communicate in a way that resonates and secures their support.

the
Matures
BORN 1945
AND EARLIER¹

AKA
"Greatest Generation"

MATURES
REPRESENT **26%**
OF TOTAL GIVING²

THIS
GENERATION
HAS A
24%
VOLUNTEER
RATE³

11%
DONATE TO
HUMAN RIGHTS
CAUSES⁴

RELIGIOUS &
SPIRITUAL CAUSES

60%
DONATE

51%
VOLUNTEER⁵



Generational Characteristics



Top Supporters of



EMERGENCY RELIEF



TROOPS & VETERANS



THE ARTS



ADVOCACY & ELECTION CAMPAIGNS

the
Baby Boomers
BORN
1946 - 1964⁷



BABY BOOMERS REPRESENT **43%** OF TOTAL GIVING⁸



THIS GENERATION HAS A **27.2%** VOLUNTEER RATE⁹

Top Supporters of



FIRST RESPONDER ORGANIZATIONS¹¹



49% WANT TO KNOW ABOUT A NONPROFIT'S FINANCES BEFORE THEY DONATE¹⁰



8% DONATE TO HUMAN RIGHTS CAUSES¹²

RELIGIOUS & SPIRITUAL CAUSES

48% DONATE

48% VOLUNTEER¹³



Generational Characteristics



Generation X
BORN
1965-1976¹⁴

Generation X + Millennials
WILL INHERIT OVER
\$40 TRILLION¹⁵



GEN X
REPRESENTS **20%**
OF TOTAL GIVING¹⁶



THIS
GENERATION
HAS A
30%
VOLUNTEER
RATE¹⁷

(VOLUNTEERS ARE 2X
MORE LIKELY TO DONATE)



9%
DONATE TO
HUMAN RIGHTS
CAUSES¹⁸

RELIGIOUS &
SPIRITUAL CAUSES

38%
DONATE
30%
VOLUNTEER¹⁹



Top Supporters of



HEALTH
SERVICES



ANIMAL RIGHTS
& WELFARE



ENVIRONMENTAL
PROTECTION²⁰

Generational Characteristics



REPRESENT OVER A **1/4** OF THE US POPULATION²² (AND NOW SURPASS BABY BOOMERS IN SIZE)

MILLENNIALS MAKE UP **11%** OF TOTAL GIVING²³



21.7% OF MILLENNIALS VOLUNTEER²⁴



18% DONATE TO HUMAN RIGHTS CAUSES²⁵

RELIGIOUS & SPIRITUAL CAUSES

32% DONATE
24% VOLUNTEER²⁶



84% OF MILLENNIAL EMPLOYEES DONATED TO A NONPROFIT IN 2014²⁷



Top Supporters of



HUMAN RIGHTS & INTERNATIONAL DEVELOPMENT



CHILD DEVELOPMENT



VICTIMS OF CRIME/ABUSE²⁸

Generational Characteristics



AKA
"Philanthrokids"



THEY'LL
MAKE UP **40%**
OF ALL CUSTOMERS³⁰



26%
OF THOSE
AGED 16-19
VOLUNTEER³¹



60%
WANT THEIR
WORK TO MAKE
A DIFFERENCE³²



76%
ARE
WORRIED
ABOUT THE
PLANET³³

Generational Characteristics

Sources

- ¹ The Center for Generational Kinetics, "Generational Breakdown: Info About All of the Generations."
- ² Blackbaud, "The Next Generation of American Giving."
- ³ Corporation for National & Community Service, "Volunteering and Civic Engagement among Older Adults."
- ⁴ Merrill Lynch, "Giving in Retirement: America's Longevity Bonus."
- ⁵ Ibid.
- ⁶ Blackbaud, "The Next Generation of American Giving: The Charitable Habits of Generations Y, X, Baby Boomers, and Matures."
- ⁷ The Center for Generational Kinetics, "Generational Breakdown: Info About All of the Generations."
- ⁸ Blackbaud, "The Next Generation of American Giving."
- ⁹ Corporation for National & Community Service, "Volunteering and Civic Engagement among Baby Boomers."
- ¹⁰ Merrill Lynch, "Giving in Retirement: America's Longevity Bonus."
- ¹¹ Blackbaud, "The Next Generation of American Giving: The Charitable Habits of Generations Y, X, Baby Boomers, and Matures."
- ¹² Merrill Lynch, "Giving in Retirement: America's Longevity Bonus."
- ¹³ Ibid.
- ¹⁴ The Center for Generational Kinetics, "Generational Breakdown: Info About All of the Generations."
- ¹⁵ ACBP, "#NextGenDonors."
- ¹⁶ Blackbaud, "The Next Generation of American Giving."
- ¹⁷ Corporation for National & Community Service, "Volunteering and Civic Life in America 2015."
- ¹⁸ Merrill Lynch, "Giving in Retirement: America's Longevity Bonus."
- ¹⁹ Ibid.
- ²⁰ Blackbaud, "The Next Generation of American Giving: The Charitable Habits of Generations Y, X, Baby Boomers, and Matures."
- ²¹ The Center for Generational Kinetics, "Generational Breakdown: Info About All of the Generations."
- ²² US Census Bureau, "Millennials Outnumber Baby Boomers and Are Far More Diverse, Census Bureau Reports."
- ²³ Blackbaud, "The Next Generation of American Giving."
- ²⁴ Corporation for National & Community Service, "Volunteering and Civic Life in America 2015."
- ²⁵ Merrill Lynch, "Giving in Retirement: America's Longevity Bonus."
- ²⁶ Ibid.
- ²⁷ The Millennial Impact, "Cause, Influence & The Next Generation Workforce: The 2015 Millennial Impact Report."
- ²⁸ Blackbaud, "The Next Generation of American Giving: The Charitable Habits of Generations Y, X, Baby Boomers, and Matures."
- ²⁹ The Center for Generational Kinetics, "Generational Breakdown: Info About All of the Generations."
- ³⁰ FastCoExist, "What Is Generation Z, And What Does It Want?"
- ³¹ Mashable, "Beyond Millennials: How to Reach Generation Z."
- ³² Ibid.
- ³³ Ibid.

STAY RELEVANT TO EACH GENERATION

Use this information to inform your appeals to each generation. Understand the makeup of your audience in order to determine where to focus your efforts, and how to create targeted communications that prompt giving.

Generational Characteristics

Notes:

Common Value: The Good News!

“What finally brought me back, after years of running away, wasn’t lattes or skinny jeans; it was the sacraments. Baptism, confession, Communion, preaching the Word, anointing the sick — you know, those strange rituals and traditions Christians have been practicing for the past 2,000 years. The sacraments are what make the church relevant, no matter the culture or era. They don’t need to be repackaged or rebranded; they just need to be practiced, offered and explained in the context of a loving, authentic and inclusive community. “

— Rachel Held Evans

Questions

- Why won’t younger people give to Episcopal faith communities?
- Is that the question?
- If not...what should we be asking of ourselves?

Cross-Generational Giving

- Are there strategies that work...with a different audience?