FUNDING THE VISION - PHASE III

✦ ROLE OF THE CLERGY
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✦ DISCERNING, DISCIPLING AND INVITING GIVERS
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PHASE III  FUND THE VISION ... WE INVITE

Alleluia Fund - Build My Church Steering Committee is assembled
A giver database develops along with gratitude and record keeping systems
Potential witness givers identified
Informational and spiritual materials developed
Servant leaders recruited and organized
Gifts for the Alleluia Fund are invited for the first time

“And he said to them, ‘Go into all the world and proclaim the good news to the whole creation.’” (Mark 16: 15)

Phase I and II have been accomplished. The vision is created and the diocese is living into it. The process has established a positive receptive environment in the diocese. The time has come to put money where the hopes and dreams are.

ROLE OF THE CLERGY

An important first step is to gather the clergy and outline what will happen next. Hopefully, these leaders have been engaged throughout the process of discerning vision, identifying mission, and developing the plan for implementing it. However, when it comes to talking about money, congregations are likely to be anxious that a diocesan offering will take money from the plate, money they count on for the congregation’s work. Clergy leadership in coping with these fears as they arise among the lay leaders in the congregation will be critical.

The fact is that countless capital campaigns and special offerings demonstrate that the opposite is most often the case. Special offerings tend to increase overall giving. It may be that these opportunities to give to specific work help us to understand just what is possible. Perhaps it makes our prayer that “your kingdom come and your will be done on earth as it is in heaven” a real effort that is going on all around us, rather than mere words. It is also easier to see ways in which we might actually impact life around us by changing some of our personal financial priorities.

Clergy may be some of the best spokespersons about the work to be supported by Alleluia Fund giving. Try to find opportunities for them to share their support for the mission. Encourage them to identify those in their congregations who share an interest in the particular ministry focus of your Alleluia Fund work. Try to provide a way for them to inform the diocese about these people so their interest can be nurtured.

Congregations will also be looking to clergy to take the lead in establishing the spiritual environment of the Alleluia Fund. Along with time to review the process, a conversation just for clergy will be an excellent time to discuss ways to make the fifty days of Easter a time for delightful contemplation and celebration of Christ’s risen presence. Let this be a time for clergy creativity to blossom.
A diocesan offering is built around several basic elements. They involve leadership, communication, and information management. One of the most important activities of Phases I and II is networking, keeping an eye out for people with these skills and interests. It is also important to be attentive to persons whose giving capacity may exceed the capacity of their congregation or whose heart for mission may be in search of an outlet.

In defining the strategy that will be employed in implementing the fund drive, it is helpful to first understand some of the principles that go into the successful gathering of money for ministry endeavors. Our belief is that we need to embrace some of the things that work in secular fundraising and blend them into our Christian community ethos.

**PRINCIPLES OF GATHERING MONEY FOR MINISTRY**

**PEOPLE GIVE TO PEOPLE.**

Though we tend to think that people give to causes, that the most deserving or neediest ministry is what gets the money, that is not so. Experience demonstrates that giving money is more about the relationship between the people asking and those giving than the purpose for the funds. The more personal the request for giving and the more connected people feel to the diocese, the more likely it is that they will be generous. It is also true that we are more generous when friends whom we respect are the ones asking. When you remember the stewardship perspective that our giving is in response to our sense of God’s call to use our resources in specific ways, it makes sense that this conversation will occur most often between persons who know each other well enough to engage in something considerably more significant than a “sales call.”

**PEOPLE ARE RELUCTANT TO FUND PROJECTS WHERE THEY HAVE NO INPUT.**

Put yourself in the shoes of the potential giver. The asker is very excited about the project, with the kind of excitement that comes when you have invested time in thinking, conversation, and making decisions about the project. They really care. As the giver, you don’t have the same investment. Here are just a couple of thoughts that might cross your mind:

- They really seem to care but it’s not the kind of thing I’ve been involved with lately.
- To invest heavily in this venture, I would need to rethink my giving priorities and strategies. I don’t think I want to do that.
- Looks like all the decisions have been made and all they want from me is money. I guess they don’t value my expertise and ideas.
Ownership shapes giving and it takes time to develop. The reason for trying to involve as many people as possible in Phases I and II is to plant as many ownership seeds as possible and give them time to germinate.

**GIVING STIMULATES GIVING.**

It is natural to be concerned that a successful Alleluia Fund offering will draw money away from congregations and the diocesan annual operating budget, but experience shows that just the opposite happens. The more opportunities for giving, the more generous we tend to be. Everyone is interested in different things and has different reasons for giving. The more options there are for giving within the church the more chances there are for matching individual interests and personal mission. One of the responsibilities of Christian communities is to provide a number of opportunities for giving in order to facilitate individual discernment of God’s call for the use of our resources.

**IT TAKES MONEY TO MAKE MONEY.**

An annual offering costs time, talent and money. Clearly it will take time and energy from servant leaders and staff. It also will cost money for events, mailings, printing, consultants, staff, multi-media, and other things. The point is that the investment is well worth the return. Many dioceses consider the cost of implementing the Alleluia Fund as part of the goal. It is
reasonable to accept costs of 10 cents on each dollar raised. Anything lower is ever better. One-on-one asking is the least expensive method and the one with the highest return. Direct mail and telemarketing have the highest cost with the least return in relation to dollars spent. In fact, if only direct mail is used, it is possible that in the first year, gifts will do little more than cover the cost of getting the program up and going.

**PEOPLE GIVE BEST IN A POSITIVE ENVIRONMENT.**

We give most readily when we feel welcome, comfortable, and appreciated. We give most readily to organizations we feel are trustworthy and effective. When it's our money, we want it to be handled in appropriate ways and used efficiently.

The decision to give money is integrated into our feelings about the church. Gathering money for ministry happens most easily when things are going well in the church, relationships are nurtured, and people have had a chance to shape the project. The opposite is true. When general communication is poor, there is a lack of confidence in the leadership, or distrust about how decisions are made and plans are carried out. Taking a critical view of “how things work” in the diocese and correcting weakness can be very important.

**THE CHURCH IS NOT THE ONLY GAME IN TOWN.**

The church is just one option for doing good in the world. Universities, schools, hospitals, the arts and many organizations are asking for money all the time. The wealthy in particular receive many requests. The church is competing with other solicitations, many of which are very sophisticated and professional. Our efforts need to fit into this landscape. Our story is part of the greatest story ever told. There is no reason to give it a second class (or even less) presentation.

**THE MAJORITY OF THE MONEY WILL COME FROM A SMALL NUMBER OF PEOPLE.**

One of the standard truths about gathering money for ministry (or anything else for that matter) is that the majority of it comes from a few sources. This does not ever mean that all gifts, even the smallest, are not important. As a general rule, 80% of the money will come from 20% of the total number of givers. That tells us how to focus our time. It also reminds us that developing a way to ask for the larger gifts is very important. Reaching the full potential of an Alleluia Fund offering in a diocese requires developing appropriate relationships with those who can give significantly. This should never be construed as giving special, excessive treatment to the wealthy while ignoring those of modest incomes. It does mean being attentive and responsive to the gifts and pastoral concerns of all.

**AN OFFERING IS A PHASED PROCESS.**

Reaching goals doesn’t just happen. Success requires a plan and an intentional approach. Conventional wisdom, based on experience, advises us to

- secure large gifts before small ones and
- approach those closest to the workings of the diocese first.
Approaching the task in phases helps to break the work into units and also allows for each part to be given the unique attention that it deserves.

**ANNUAL OFFERINGS ARE LABOR INTENSIVE.**

The best way to get money is to ask for it personally. This means that there are many details, information to coordinate, and things to keep in order. Relationships are essential to the development of a healthy and robust Alleluia Fund. The best way to become committed to an offering is to work on it. All of these facts lead to the conclusion that the more people that are engaged to help with the implementation of the offering, the better. This makes the work easier for everyone and creates a following in support of the Alleluia Fund. It is also an excellent way to raise up leaders for other diocesan ministries.

**YOU CANNOT ASK FOR MONEY WITHOUT TELLING YOUR FAITH STORY.**

It is impossible to do an effective job of asking others to give without telling them why you are giving. The answer to “why I am giving” will involve matters of faith, a personal hope for the way the world might be, and our own relationship with God and God’s people. This is a very inspiring and exciting truth as it helps people become aware of ways that they can live out their call and Baptismal Covenant. In short, an annual offering is an opportunity to walk a few steps further in our spiritual journeys. This possibility should help shape every aspect of the program.
THE NECESSARY TOOLS

"Grant us, Lord, not to be anxious about earthly things, but to love things heavenly: ... to hold fast to those things that shall endure... “ Collect, BCP p. 234
Let everything be done decently and in order. Colossians 14:40

E very task has its required tools and an annual offering is no exception. Here are the ones that will be required for a successful Alleluia Fund. It is crucial that leaders understand that this is not a place to cut corners. Every item on this list is essential and must be provided adequately. When you hear someone say “oh, we don’t need that,” it is time to be aware that cheap, inadequate tools can be very costly in the long run.

SYSTEMATIC PRAYER

He offering begins, is sustained, and is celebrated with prayer. More about its place in the program is found in section 2, The Spiritual Emphasis Plan.

EXCELLENT FINANCIAL ACCOUNTING SYSTEM

Accurate records of gifts received are essential. As a practical matter, the diocese must be prepared to send the annual acknowledgement of all gifts in excess of $250 to givers as required by federal tax laws. However, rather than letting the IRS determine your acknowledgment standards, you will do much better to remember Jesus’ celebration of the widow’s mite and acknowledge every gift. Without good records this will be impossible.

EXCELLENT FINANCIAL AND ADMINISTRATIVE SUPPORT SYSTEMS

An annual offering adds to the workload of the diocesan staff. There will be mailings to prepare, a mailing list to maintain, gifts to record and acknowledge, and giving records to be maintained. There will be some new diocesan responsibilities. For example, dioceses without an annual offering have very few IRS contribution letters to send. Introduction of the offering will increase the necessity for keeping the records to determine which givers must receive such a letter each January and to process them. All of these tasks should be clearly assigned to specific staff. It may be necessary to hire additional staff, even if on a temporary or part-time basis. Consider the cost of additional staff time as a cost of the offering.

UP-TO-DATE DATABASE

This should have the capacity of recording not just gifts received, but names of persons who express interest in specific ministries, make offers of assistance and expertise, and serve on various committees.

A REGULAR PRACTICE OF ACKNOWLEDGING GIFTS RECEIVED

If the only way you know your gift was received by the diocese is through the cancelled check in your bank statement, the diocese has thrown away a vital opportunity to strengthen its relationship with persons in the diocese who are proclaiming in a tangible way that they support diocesan ministry. Acknowledgments are especially important for gifts made in memory or in honor of loved ones.
One cannot raise money without spending money, within reasonable limits. The return is likely to be commensurate with the investment. The cost of an annual offering varies with the scope, length and size of goals. Givers seldom ask about annual offering costs, and it is not good practice to raise the subject or to brag about how low the cost may be.

These expenses can be handled in a variety of ways. While no funding methodology is painless, the usual practice is to make annual offering expenses a charge against the annual offering goal or to have them covered by an earmarked gift. The diocesan governing body approves a budget. A typical budget will include the following expenses:

- Printing
  - Spiritual emphasis materials
  - Posters
  - Giving envelopes
  - Brochure
- Postage
- Travel
- Consultant fees
- Staff (including temporary staff for data entry and record keeping)
- Office expenses (copying, stationary, etc.)
- Telephone
- Events
- Training for leadership
COMMUNICATIONS

Generally, a substantial portion of the goal has been raised before Easter through personal solicitation of Witness Gifts. A positive climate needs to be prepared. Therefore, the diocese’s own publications should document the need in advance of invitations to give and announce the coming of the Alleluia Fund. Soon after the leadership gifts and critically important Witness Gifts have been committed is usually the point at which about 40-50% of the goal has been raised. The announcement can be part of a diocese-wide dinner or event or some kind of other special communication. Visibility should happen at the congregation level as well. When necessary, telephone conferences, fax, e-mail and other technology can be used for communication convenience.

PREPARATION OF BASIC ALLELUIA FUND MATERIALS

The Alleluia Fund - Build My Church name will help focus attention on the major theme of mission and the Easter Season and will give the annual offering its identity. Local materials will need to be developed to personalize and expand on those offered by the national church office.

The basic objective of locally written Alleluia Fund materials is to communicate theologically, emotionally, and intellectually those aspects of the diocesan Vision for Ministry that cannot or may not be communicated by an offering worker. They create an environment that facilitates gift support for the annual offering.

The materials needed for the annual offering include the following:

- The Vision for Ministry statement (See Living into the Vision – Phase II)
- Giving Envelope
- Ways of Giving information with suitable references to planned giving and named gift opportunities (See Ways of Giving)
- Periodic communication to servant leaders in the form of memos or newsletters on such topics as leadership gifts, anecdotes and reminders of key upcoming dates and events
- An Alleluia Fund worker’s packet – includes the following items
  - Vision for Ministry statement
  - Ways of Giving
  - Giving envelopes
  - Spiritual Emphasis materials
  - Schedule of workers events, meetings, reporting deadlines, etc.

These are also useful but may be considered optional

- A variety of special materials, such as stationery, presentation folders, and workers kits.
- A multi-media presentation if desired.
- Special gift program brochures and materials.
- Banners or posters
The giving envelope for an annual offering is very important and has some unique design features. Because the Alleluia Fund will be conducted year after year, the objective is to encourage more and more people to participate. The goal is also to encourage each giver to increase the size of the gift annually. The use of giving levels on the giving envelope is one way of facilitating this. It also serves a check to make sure the amount enclosed is what the giver intended. Because the Alleluia Fund takes place during the 50 days of Easter and some people will want to emphasize the daily nature of their giving, amounts and ranges printed on the envelope should be in increments of 50. The following is a sample of such a list as it might appear on the offering envelope:

- $5,000 or more
- $1,000 - $5,000
- $500 - $1,000
- $100 - $500
- $50 - $100
- $1 - $50

It is also important to make giving as convenient as possible. It is helpful if gifts can be paid by a credit card and also opens up the possibility of having a website for accepting donations. For information about a system of receiving gifts through automatic funds transfers, talk with your local bank. The Stewardship Office at the Episcopal Church Center also maintains some information about organizations who can provide this service.
The Alleluia Fund Steering Team report to the bishops and diocesan governing body.
INTRODUCTION

It is important that this annual offering be done in a way that creates excitement and has spiritual integrity. In order to enhance future offerings, it is important to develop annual offering relationships, programs, and strategies that continue after the goal has been reached.

The primary objective is to secure annual diocesan commitments for mission activities. An annual offering is built around a network of people designed to provide the necessary access and influence. The following suggested organizational structure can provide the leadership necessary for an effective Alleluia Fund program. It is helpful to build upon the structures and resources already in place. It is understood that the structure will evolve as the offering is implemented each year. The organizational charts illustrate how that might happen.

Leadership for all gathering money for ministry activities during the Alleluia Fund will be centered in the following bodies:

DIOCESAN GOVERNING BODY

(Standing Committee, Executive Council, Trustees, Diocesan Council, etc.)

First and foremost, the Alleluia Fund is under the aegis of the diocesan convention and governing body. Governing body members are ultimately responsible for what is achieved and the policies and procedures related to the annual offering. Their role will be that of advisors, advocates, and offering workers. Their actions by word, deed, and gift will set an example for others to emulate. They are also responsible for overseeing the stewardship and accounting of the monies associated with the annual offering.

ALLELUIA FUND CO-CHAIRS

They establish the leadership required to direct the servant leaders and activities of the annual offering. They also recruit and chair the Steering Team meetings, and coordinate with the diocesan governing body, other diocesan bodies, and staff. The chairs also are helpful with asking for Witness Gift and are the public “face” for the annual offering. They work closely with the Bishop who is a key advocate and Witness Gift offering worker.

THE ALLELUIA FUND STEERING TEAM

This group will provide day-to-day leadership for the total effort. Membership on the team will include the chairs of all key annual offering teams. This is the group of leaders that plans the annual offering, guides it through the preparatory phase, gives first, coordinates invitation to give of the Standing Committee and staff, and invites and enlists other key annual offering leaders. The latter then conducts the rest of the annual offering with the help and guidance of the Steering Team.
The Alleluia Fund Steering Team has both marketing and administrative functions. The team’s marketing function is to present, by all available means, the Vision for Ministry for support to the congregations. Its specific marketing and communication tasks focus on the identification, discipling, invitation to giving, and stewardship of givers.

In addition to the specially recruited sub-team chairs, the Bishop is a regular member of the Alleluia Fund Steering Team and the staff and Treasurer are ex officio members. The purpose of their membership on Steering Committee is to facilitate and coordinate the annual offering’s administrative functions with those of day-to-day diocesan life. In this regard, the committee chairs and staff act in concert with the Steering Team.

The Co-Chairs will head up the Steering Team. They will select and appoint chairpersons of the sub-teams that, in turn, will recruit others to serve as the manpower of the annual offering. These can be organized as follows:

**THE SPIRITUAL EMPHASIS TEAM**

This group of individuals will set the spiritual and theological tone for the annual offering. They will form a mechanism for ongoing prayer, provide a spiritual context for annual offering meetings and gatherings, and design a communication system for people to tell their stewardship stories. Spiritual growth is to be a hallmark of a well-run Alleluia Fund and multiple options are needed for congregations and individuals. It is particularly helpful to use the 50 days of Easter as the focus for many of these activities. This team also thinks through how best to utilize the spiritual materials offered by the national church office.

**COMMUNICATIONS TEAM**

This team should include individuals with knowledge of developing printed materials and the options for regular communication with congregations and individuals. They will be helpful in developing plans to increase the congregations’ receptivity to the annual offering and in the development of all Alleluia Fund materials. Their first task will be to assist with the re-development of the Vision for
Ministry-for-giving. They are also to work with the Spiritual Team to develop ways for stewardship stories to be told.

**INSPIRATIONAL SPEAKERS**

This group may be a subcommittee of the Communications Team. These individuals are recruited because of their special abilities to tell their faith and stewardship stories. They are available to congregations as a resource throughout the 50 days of Easter.

Personal stories are powerful connectors that allow us to see how the biblical story is happening around us every day. Stories of joyful giving on the part of individuals and congregations invite others to give and to share their stories, creating a circle of thanksgiving and celebration in the church.

Those who have understood stewardship as limited to fundraising can discover a broader, richer opportunity than they have ever known before as they hear stories from the diverse people who are their brothers and sisters in Christ. These powerful individual stories merge to become community stewardship stories as members of congregations write statements which begin with the words “we believe...”, “we commit...”, “we invite...” These stories serve as inspiration and as a model for teaching a theology of stewardship in our church.

**TECHNOLOGY TEAM**

This team is made up of people with specific skills and access to technology resources. Communication is a key to good discipling and gathering money for ministry. This team will explore ways that modern technology can be used to manage and convey information. This might include computers, multi-media, e-mail, websites, PowerPoint, downloads and the like. These resources are used to support the work of the other teams.

**EVENT TEAM**

The event team will be responsible for developing and implementing any diocesan-wide events that are needed for the annual offering. Each year might lend itself to different opportunities. A kick-off event might be a good way to start the Alleluia Fund and there might be smaller events for offering workers and other servant leaders. Many annual offerings have a celebration event to put closure on it. Sub-teams would include such things as: invitations/RSPV’s, entertainment/program, food, location/logistics, & promotion.
LEGACY STEWARDSHIP (PLANNED GIVING) TEAM

The emphasis on legacy stewardship, if not already present in the diocese, can be added in year two or three once the offering becomes established. If such a group already exists, it is important to incorporate these programs and leaders into the Alleluia Fund. The annual offering can become part of the delivery system for legacy stewardship activities. The Alleluia Fund response instrument (giving envelope) can become a way to find out who has included the church in estate plans and to request more information.

Members of the group have specialized expertise in such things as financial planning, insurance, estate planning, bank trust work, investments, law, or accounting. They can develop a series of seminars concerning legacy stewardship to be conducted throughout the diocese. The minimum task is to encourage people to have wills drawn up that reflect their values and concerns. (See the rubric on page 445 in the Book of Common Prayer.)

The Legacy Stewardship Team (or Planned Giving Council) is responsible for setting the policies regarding deferred gifts for the annual offering and gifts in general. It is intended that its members become knowledgeable resources for congregations and individuals. This is a permanent committee that will continually develop an interest in legacy stewardship activities to benefit the Episcopal Church at the local, diocesan, or national level. They may do such things as establishing a society for acknowledging deferred gifts and holding an annual event for society members. Membership could involve limited rotating terms. The Episcopal Church Foundation has a diocesan development program that is ideal for this work.

LEADERSHIP GIFTS TEAM

This team’s members invite the gifts of clergy, diocesan, and annual offering leaders. The chair of the Leadership Gifts Team will coordinate his/her work with the Witness Gifts Team chair in order to make certain that potential givers are effectively invited. This team will involve about one person for every five that must be asked. It may work well to have laity and clergy Co-Chairs.

WITNESS GIFTS TEAM

Members of this team assist the Co-Chairs, the Bishop, and the Alleluia Fund Steering Team in inviting gifts from all individuals who might consider giving $5,000 or more. The teams will have individuals with access throughout the diocese. Each of them will invite approximately five potential givers. Generally, individuals who serve on the Witness Gift Team should be capable of making substantial gifts themselves. This team may include sub teams focused on various constituencies, churches, or groups of people. This team also makes recommendations regarding named gift opportunities and suggested gift amounts.

It is understood that the Witness Gift portion of the Alleluia Fund is critical to long-term goal success but will be something that will evolve. Even if you only start with a small number of asks, the goal can be to double this number each year until this part of the offering is generating a substantial amount of money.
It is very important that workers understand the pastoral nature of the invitation to give to diocesan ministry through something like the Alleluia Fund. The primary task of the asker is to assist the potential giver in discerning God’s call for their life and resources. The correct question is not the sales call question “Will you give?” Rather, the correct question is something in the nature of “is this work which you feel God is calling you to support? Is its purpose consistent with what you discern to be God’s call to you in using the gifts and resources He has given you?

CONGREGATIONAL GIFTS TEAM

This team is composed of the church contacts throughout the diocese. They will, however, need one or two persons identified as team leaders. These team leaders carry the primary responsibility for communicating with the church contacts and representing them in meetings of the Alleluia Fund Steering Team.

CONGREGATIONAL LEADERS AND TEAMS

Each congregation will need a team of workers. The size of the team will depend on the size of the congregation. Considering that approximately 33% of the congregations in the Episcopal Church have an average Sunday attendance of 50 or less (60% of our congregations have average Sunday attendance of 100 or less) the team in many congregations will consist of one clergy and one lay person. Please try to keep this from being a cause for anxiety. God will never send us one unit less than 100% of the resources we need to do the work God wants done. It will be important to encourage these small teams to do what can be done with joy and a sense of God’s delight in their efforts and not worry about how some other congregation is organizing the work.

A full congregational team will consist of the following persons and tasks.

CHURCH CONTACT

In a well-developed program, each congregation will have a person who will serve along with the priest as the point of contact for information about and the implementation of the Alleluia Fund. They will chair the Church Steering Team and in general see that the annual offering is conducted as planned. People already involved in related activities will do some functions, others may require special recruitment, and still the Church Contact may do others.

PRIEST IN CHARGE

The priest and senior warden shall be ex officio members of the Church Alleluia Fund Steering Team. They support the annual offering leadership and offering advice and counsel. The special roles of the Priest in Charge during the conduct of the annual offering are to:

- Act (along with the Church contact) as spokesperson for the Alleluia Fund;
- Ensure the dedicated participation of all staff toward the achievement of annual offering goals;
- Assist the Church Contact in facilitating whatever decisions and action may be deemed necessary;
- Be at the disposal of all annual offering witness gift teams for the purpose of assisting in the invitation of gifts;
- Supervise the spiritual integrity of the annual offering.
**Events**

The event function involves developing and implementing church events that complement those being conducted in the diocese or convocation for the Alleluia Fund. The purpose is to provide visibility and create a level of excitement for the Alleluia Fund. Sub-teams may include such things as: invitations/RSVPs, entertainment/program, food, location/logistics, and promotion. It is also necessary to promote and coordinate diocesan or convocation events.

**Youth**

It is important to identify and implement ways for the youth of the church to be a part of the Alleluia Fund. This includes ways for gift giving and for growing spiritually.

**Communication**

Individuals with knowledge of developing creative ways to offer visibility for the annual offering and of the options for regular communication with the church membership can be helpful with this task. They will be beneficial in developing plans to increase the congregation’s receptivity for the Alleluia Fund. They are also to work with the Spiritual Team to develop ways for stewardship stories to be told. It is also important that they take advantage of materials provided by the national church and diocese.

**Spiritual Emphasis**

Individuals will work with the priest to set the spiritual and theological tone for the Alleluia Fund. They will form a mechanism for ongoing prayer, provide a spiritual context for annual offering meetings and gatherings, and design a communication system for people to tell their stewardship stories. Spiritual growth is to be a hallmark of the annual offering and multiple options are needed for congregations and convocations. They will also help their church take advantage of the resources being offered by the diocese.
A WORD ABOUT GOALS AND TITHING

Whether or not to set a specific financial goal is a diocesan decision. Some givers find these goals helpful in deciding how much to give regardless of the fact that this style of decision-making is inconsistent with our theology. Our stewardship notion of giving teaches that all that we have is a gift from God. Our giving is a regular, thankful response to that demonstration of God’s love for us. The standard is the tithe, a return of ten percent of all that God gives to us. Obviously, a spiritual practice of tithing makes the usual financial goals set for fundraising programs less influential.

In a world where people are growing into an awareness of the abundant nature of God’s kingdom, struggling with a desire to trust that it might be so, we cannot assume a tithing culture. Citizens of the United States give slightly less than two percent of their income to all church and charitable organizations. This includes all giving to hospitals, universities, schools, health and cultural organizations. It is important to note that giving as a percent of income has been declining slowly but steadily since the end of World War II. In the years between 1968 and 1998, personal income (after taxes, adjusted for inflation) increased 91 percent. Giving as a percent of income declined by 19 percent.

Considering this context in which we live and work, use prayerful reflection to address the matter of specific goals. Whatever you decide, the following are some other goals to consider, including:

- Everyone in the diocese receives information about the mission driven work to be funded by the Alleluia Fund offering.
- Everyone in the diocese has an opportunity to give.
- The invitation to give is delivered in such a way that everyone knows that every gift will be honored regardless of size. In other words, the widow and her mite are welcome.
- Set a participation goal that can grow from year to year.

ORGANIZING THE INVITATIONS TO GIVE

There are good ways and better ways to ask people to give money. A good way is to provide accurate, inviting information about the ways in which money will be used to everyone who might possibly give anything for the selected purpose. The better way is to spend some time thinking about who might have both the inclination and ability to give, how much they might give, and how might be the way to invite them to give in order to encourage the greatest potential gift. Then, plan different invitations based on that inclination to give so that you spend the most time where the inclination is greatest.
In secular charitable and philanthropic organizations, 80% of the money comes from 20% of the donors. A review of most congregations’ giving records would confirm that this 80/20 ratio seems to be true there as well. There are a number of reasons for this, including the fact that the gift of making large sums of money is not one that God has given to everyone and the inclination to give has not been equally formed in all of us.

Another factor in our decisions to give of our resources is the desire to invest in a winner. There is risk involved in giving. When we see that others have made the commitment to give, it reduces the sense of risk and gives way to our natural desire to be generous people who are part of a generous group. That is why beginning with a few early commitments to give actually encourages a broader base of givers.

The best way to organize and Alleluia Fund invitation to give is to issue invitations to give in the following steps:

**Leadership gifts** - Personal invitations to all persons in leadership in the diocese (especially the Alleluia Fund steering committee).

**Witness Gifts** - Personal (on-on-one) invitations to persons leadership thinks may have the ability to give $5,000 (or other amount set by the fund leadership) and an inclination to support the work of the Alleluia Fund.

**Congregational Gifts** - A direct mail invitation to everyone else in the diocese. Inviting early Witness Gifts and announcing these early commitments will encourage others to give. An excellent way to organize the invitations to give will follow a schedule somewhat like the following:

**THREE MONTHS BEFORE THE CONGREGATIONAL GIFTS PHASE BEGINS (EASTER)**

Identify persons who will be asked to make a Witness Gift.

Identify persons who will deliver these invitations. This is the Witness Gifts Team.
TWO MONTHS BEFORE THE CONGREGATIONAL GIFTS PHASE BEGINS

Train Witness Gifts Team

Arrange meetings between team members and those persons with whom they are to have a conversation about giving a Witness Gift. These visits must be completed at least two weeks before the Congregational Gifts phase.

Report results of these visits promptly to the Witness Gifts Team leaders.

NO LESS THAN TWO WEEKS BEFORE THE CONGREGATIONAL GIFTS PHASE BEGINS

Collect results of all Witness Gifts visits. Announce results. Information about these results can be included in the materials sent during the Congregational Gifts Phase.

DISCERNING POTENTIAL GIVERS

How do we know who might be willing and able to give a Witness Gift? The three most important tools in this process are listening ears, a good database and a small discernment group of people willing to pray and think about who the witness givers might be.

LISTENING

Listening begins in Phase I and never ends. Listen for interested voices asking questions and offering enthusiasm. Record the names of those who attend vision/mission discernment activities. Note comments and ideas to serve as future reminders of both ideas and individuals who spoke them. Listening is the intangible tool that will depend heavily on the tangible database.

DATABASE

The database is the place to note the names of the interested. It should also contain accurate information about all of the individuals who will be asked to participate in the Alleluia Fund. Those individuals who are potential givers have to be identified, and information systems have to be established to indicate the potential givers' affiliation with the diocese, past support, and known interests.

SETTING UP THE DATABASE

There are a variety of computer programs designed for this purpose. There is a listing of those frequently used by professional fundraisers in the appendix.

Setting up the database

- Begin with the diocesan mailing list. For most dioceses, the list which is most nearly complete is the one they use for their newspaper.
- Check the completeness of the list. Ask congregations for updates.
- Check the accuracy of the list. Are names spelled correctly? Are you using the correct honorific (Mr., Mrs., Miss, Ms., Dr., The Rev., etc.)? This can be subjective. For example, widows of one generation may resent being addressed as Mrs. Mary Smith because when they grew up the use of a woman's first name meant she was divorced. Wives of a later generation may be equally resentful to be addressed as Mrs. John Smith as they feel failure to use their first name discounts them. If you are going to send information to young people, do you know their
names as well? “And family” or “and children” doesn’t set well as a mailing address for most teens.

- Record relevant data. This will include name of the congregation, leadership roles, diocesan leadership roles, and other diocesan activities and affiliations. It will also include indications of interest in specific ministries and response to the vision and mission of the congregation and the diocese. Don’t depend on your memory to store insights as to the way in which people are discerning God’s call to them. Use the technology available for this vital, pastoral work.

- Add the names of personal contacts of the diocese, and potential foundations.

- Record results of giver discernment here. Entries should include whether the individual will receive a leadership or witness gift invitation or be included in the congregational gifts phase. If a witness or leadership gift invitation is indicated, record the name of the person who will make the invitation.

- Once the offering work begins, record results in this same database.

Phase I, Create the Vision is not too early to begin work on the database. In fact, as you proceed with Phases I and II, you will find it helpful to record the names of those who participate in the vision creating and refining activities, especially those who demonstrate more than ordinary interest.

**Giver Discernment Group(s)**

Ask God’s help in calling a gift discernment group together. This is not a formal committee and might actually be several small groups pulled together in different parts of the diocese for a single session. Invite persons who have a wide range of relationships in their region, a strong commitment to the diocesan mission, and possess the capacity to support the diocesan work financially.

Their task will be to compile a list of persons who will be invited to make a Witness Gift ($5,000 or more) to the Alleluia Fund. During the meeting they will need to assess the following:

- Capability of the potential giver to support the annual offering
- Ideal person to talk with them about it
- Possibility that the potential giver might be recruited as a worker in the annual offering
- Relevant information about the giver that will be helpful in the invitation to give, including the potential giver’s relationship with the diocese. This may include selection of a specific aspect of the project for which the individual’s gift will be sought.

The annual offering itself will lead to still other potential givers. Inevitably, potential giver identification will be an ongoing activity. The major portion of this activity should be completed in a timely fashion so that potential giver discernment activities can begin on time.
HOW MUCH TO GIVE IS A DECISION BASED ON SEVERAL FACTORS. THESE INCLUDE EACH INDIVIDUAL’S:

- Financial capacity to give
- Inclination to give
- Interest in the purpose for which gifts are requested
- Sense of personal mission for their lives and
- The nature of the invitations to give that they receive

How these factors work together varies. Understanding that particular mystery is less important than being attentive to clues about these five giving decision factors. Giver discernment is the process of deciding who might be inclined to give how much to what ministry. As part of the process, it is helpful to group the discernings into several groups in order to issue the most effective invitation to give.

Potential givers to an annual offering such as the Alleluia Fund tend to fall into three or four groupings. The smallest group will include those individuals and foundations willing and able to give substantial gifts. What constitutes a “substantial” gift will vary but a commonly used definition is $5,000 or more. For purposes of convenience, we will call these Witness Gifts. This is one place where the Alleluia Fund will expand each year. No matter how small you have to start, plan to double the number of witness invitations each year.

The second group includes those individuals capable of gifts ranging from $1,000 to $5,000. This group will be slightly larger than the Witness Gifts group. The third group will be those whose gifts will be in the $500 to $1,000 range. The fourth group is the largest and includes those whose gifts will be less than $500.

We have a very peculiar attitude towards money in the church. Though we need this resource for our work and know that many people find real joy in giving it, it can be difficult to talk about. A discussion of who might have large sums of money and whether they might be willing to use some of it to support the work of the diocese or congregation can feel awkward.

There are several companies who, for a fee, will put a list of names through their databases of individuals, their spending and giving patterns, and estimate amounts they might be likely to give. Whether to use this type of service is another diocesan decision. A list of some of the best known is included in the appendix. In most dioceses, the constituency is large and not well known to the diocese, making this type of service especially useful.

Conventional wisdom in the charitable fundraising culture in the questions of “who should ask whom to give how much” is based on the principle of “peer invitations to give.” The underlying assumption of this theory is the belief that many potential givers base their decision about the amount of their gift upon knowledge of how much their peers are giving. Further, if offering workers are peers in giving ability, it is easier to obtain maximum potential gifts. Usually, peer invitations are the most socially comfortable arrangement for both the potential giver and the offering worker.
The principle of peers asking peers is not a class system in a shabby disguise. It acknowledges the principle of empathy. The conversation we want to have with every potential giver is not “how much will you give?” Rather, the question we want to engage is, “How is God calling us to use the resources with which God has blessed our lives?” It just makes sense to try to put people with someone with whom that conversation has a chance of taking place. Peer relationships are not the only way to make those match-ups but it is a place to start until we improve upon it through wisdom and experience.

Prepare an announcement of these early results and distribute to everyone in the diocese in time for the first day of the Congregational Gifts Phase.

**DISCIPLING GIVERS**

Discipling givers is much more than cultivating a donor. It is a significant act of spiritual mentoring. Its goal is not to secure a big donation for a project dear to the heart of the one doing the asking. It is an act of love that has as its primary purpose helping the giver discern God’s hope for their life and resources.

Articles or series of articles in the diocesan newspaper, along with a special informational piece mailed to each household are excellent ways to let everyone in the diocese know about the diocesan mission and ways of supporting it through the Alleluia Fund. However, these are no substitute for opportunities to talk about these matters where listeners can ask questions of leaders and assess the level of support coming from their own circle of friends. Be sure to include small group opportunities as part of your “telling the story” efforts. These can be as elaborate as a Bishop’s banquet or as informal as including the essential facts about the annual offering in casual conversation in a setting that is totally unrelated to the offering.

Discipling depends on establishing a relationship between potential givers and key spiritual leaders. This kind of activity can happen within each convocation or region. A frequently employed method is an informal social event (perhaps in a parishioner’s home) to which an Alleluia Fund worker invites potential givers. It is made clear that a part of the evening will be devoted to a presentation about the diocese but that there will be no invitation to give during the event. Such presentations impart information very well and serve notice that the Alleluia Fund will be approaching the potential gift giver to ask his or her support.

The object of these events is to tell the story of diocesan vision and mission, and to create a conversation about the work to which God is calling the diocese and its people. The occasion is a success if guests leave feeling friendly towards the diocese and with at least a general knowledge of the Vision for Ministry for the Alleluia Fund without feeling pressured to make a decision about giving.

**Important Note** – Though you may not plan on making a “hard sell” invitation to give at the gathering, be prepared to answer if someone asks, “How much do you need” or “How much do you expect me to give?” It is a good idea to look over the guest list in advance and decide how you might answer each person. Your answers may range from a specific amount to a comparison amount like “an amount equal to your country club dues, as much as you plan to give to your favorite charity, or as much as you plan to spend on the family vacation.”
The Alleluia Fund Co-Chairs have been selected because of their knowledge of the diocese and respect in the congregations. Ideally, the Steering Team will consist of people with affluence, influence, knowledge, and the action orientation necessary to serve in this key volunteer capacity. It should include members and visible church leaders from the various parts of diocese.

Assembling the team can include a survey of congregational leaders to request recommendations for each major position in the annual offering. In addition, a wealth of recommendations can be obtained through informal networking.

Matching people with the correct skill set and call to the right tasks is the key. Those who will be asking for Witness Gifts should be selected based upon careful analysis of who the potential givers are, how much they can be expected to give, who their business and social peers are, whom they hold in high regard and other factors that can help the interpersonal dynamics of the invitation to give process work smoothly.
The Alleluia Fund is structured around Co-Chairs who use all of their influence and drive to move the annual offering forward, and a Steering Team to help establish policy and oversee its implementation. The structure includes people at the congregational level as well. Leadership identification concludes with the selection of leaders for each position shown in the organizational chart. Position descriptions are included in the section on structure. Each person should assemble those who will be working with him or her on a particular task.

Well-run Alleluia Fund offerings prepare people for the tasks they are being asked to do. Plan at least one training opportunity for each category of worker. These meetings allow leaders to discuss the future of the diocese, the Vision for Ministry for the annual offering, techniques of invitation to give, and annual offering strategy. They strengthen the resolve of half-hearted offering workers, enhance the courage and self-confidence of the timid, and establish a strong sense of group identity and responsibility for the success of the annual offering.

Kits should be provided to each volunteer, consisting of an Alleluia Fund guide, a Vision for Ministry statement, spiritual emphasis materials, annual offering brochures, offering envelopes, pledge cards and other materials as needed. These same meetings can also be used for the assignment of potential givers to those asking for gifts.

Two principles of gathering money for ministry will be applied throughout the annual offering. First, it is important that those who ask others to give must first do so themselves. People expect those who know the diocese best to give thoughtfully and in proportion to their means.

The second principle is that enlistment of leaders in the annual offering should, wherever possible, be preceded by the invitation to give. This approach avoids the obvious problem of recruiting an annual offering leader who may then not make a leadership gift, and whose example may then affect an entire segment of the Alleluia Fund offering.

The invitation to give in an annual offering should always be a phased process. It starts with the potential givers closest to the diocese such as the diocesan governing body and the Alleluia Fund’s top leaders, then extends to other annual offering leaders, to potential givers for the largest gifts (Witness Gifts), and so on until it reaches all potential givers.

The Steering Team gives first because Witness Gift potential givers will want to know what the key leaders have given. If those who know the institution best are not responsive in a thoughtful manner and in proportion to their means, there is little rationale for anticipating such giving from others. The Witness Gift potential givers not in this group are invited next because their gifts are essential to the momentum of the Alleluia Fund offering.

As has been noted, gifts from the leadership circle are essential in setting the sights of potential witness givers from throughout the diocese. Getting 100 per cent leadership participation is the goal. This should include clergy, diocesan committee and commission members,
Receipt of several major Witness Gifts in the early stages of the Alleluia Fund offering will give unparalleled momentum to the annual offering and help to ensure its success. While it is hoped and expected that some Witness Gifts will be received from annual offering leaders, additional invitations to give for key gifts at this early stage will probably be desirable. It also serves to raise the sights of the overall diocese.

Assignment of these key gift invitations will be done on a case-by-case basis, but will probably involve the Bishop, members of the Steering Team and Witness Gift Team. These individuals will be prepared through equipping sessions. These meetings will inform about the Vision for Ministry for the annual offering, invitation to give techniques, and offer knowledge of special giving options for making major commitments.

Invitation to give gifts in the upper levels of giving involves a great deal of personalized contact between potential giver and volunteer, suggesting that standardized formats, using standardized brochures, will not be as effective as carefully tailored approaches. Because of the value of the gift size being sought, repeat visits are likely for a further exchange of information.

Potential witness givers may well wish to discuss matters of this magnitude with their spouse, personal advisors, such as accountants, bankers and attorneys. Expect to coordinate strategies with regard to individual potential givers that also have foundation connections and to put closure on all of these gift requests.

The chair for each team is responsible for enlisting the needed servant leaders for that particular scope of work. They also will work to identify every potential giver.
in their division and invite the gifts and of those potential givers. Each team will accomplish their work in the following phase:

**PLANNING AND PREPARATION**

- Identify potential givers
- Evaluate potential givers
- Invite and enlist volunteer leaders
- Make invitation to give assignments
- Train and equip volunteers

**INVITATION TO GIVE PHASE**

- Cultivate potential givers
- Invite from the largest potential gifts downward
- Report progress at one-week intervals

At the end of the Witness Gifts phase leaders will want to make an interim assessment of the annual offering in order to determine whether it is on track in terms of the activities of servant leaders and staff and in terms of gifts received. Exceptional success in the Witness Gifts phase may lead to a re-evaluation of the total goal that will be announced to the public. Alternatively, if there are problems with the annual offering to date, there is time for corrective action, including reducing the goals. Usually only after the interim assessment is completed will the annual offering goal and process be announced publicly.

**CONGREGATIONAL GENEROSITY PHASE**

The final phase of the Alleluia Fund will include the invitation to give of any potential givers not invited during the earlier phases of the annual offering, including any Witness Gift potential givers not approached earlier.

Congregation, convocation, and diocesan announcements of the Alleluia Fund will depend upon success in the preceding phases of the annual offering in achieving a significant portion of the goal. It makes sense to target a special event as the time for the kick-off and annual offering progress announcement.

The final weeks of the annual offering will include a direct mail offering to:
- All identified potential givers who have not been invited.
- Those persons invited without result and whose names have released by those who have approached them.
- Phonathons at the church level will be considered as a follow-up measure among those potential givers whose circumstances would seem to justify this further effort.

While publicity at every stage of the Alleluia Fund offering is important, high visibility during the Easter season is particularly important. Use of audio-visual materials, clever announcements and print media interviews will help to enhance the response.
to direct mail offerings. The goal is to keep excitement high and sustain a positive environment in which to have gift invitation occurring. This is the ideal time to offer opportunities for people to explore principles of stewardship and to grow spiritually.

**Recording and Acknowledging Gifts**

It is important that the system for posting gifts, their receipt and acknowledgment be set up and ready to go before anyone is asked to give. These functions, often referred to as “gift processing,” will be centralized to ensure uniform categorizing and timely acknowledgment. The generation of needed reports on annual offering progress is also a function of this activity. Because the system will be coordinated from the diocesan central office, it will be compatible and easily adapted when the intense annual offering activity is over and the office is to sustain the quality of record keeping desired.

Basically this is the flow of money, records, and acknowledgments.

Individuals make their decisions and send their gifts to the diocese. Most of these will be checks but may be stocks, insurance policies, bequests, and other forms of gifts. (See Ways of Giving).

1. Money is received at the diocesan office.
2. Checks should be copied, the check deposited in the bank and the copy used for entering the gift into the database. Copies should be filed according to individual giver. Hopefully, the giver will have returned the enclosure form that is part of the gift envelope package.
3. Information about each gift is entered in the database. This information should include the following: date gift was received, name of giver, amount of gift, giver’s address, and whether the gift is in honor or memory of someone. The giver’s name should already be in the database but the address should be checked and updated if necessary.
4. The acknowledgment letter is prepared. A sample letter is in the appendix. Acknowledgment letters should include the amount of the gift. If the individual has made a pledge, the amount of the pledge and manner in which it will be paid (monthly, quarterly, stock, insurance, etc.) should be clearly stated in the letter, along with the name, phone number and/or e-mail address of the person to contact if the information is incorrect. Ideally, these letters are mailed within 48 hours of receipt of the gift. Though standardized letters are acceptable, if it seems appropriate to draft a special letter for some gifts, please do so. Efficiency should never take priority over the need to develop relationships with those whose heart for ministry is growing.
5. A copy of the signed acknowledgment letter is filed.
6. At regular intervals (daily or weekly) the total amount of gifts entered into the database are reconciled with the total deposited in the bank.
The volume of letters in a diocesan offering can make asking a single individual sign all letters a daunting task. One way to divide that task is as follows:

- The offering worker, the Bishop, and the Alleluia Fund Co-Chairs can acknowledge gifts of $5,000 or more.
- The offering worker and the Co-Chairs can acknowledge gifts under $5,000.