

## Diocese of Ontario

## STEWARDSHIP &amp; COMMUNICATIONS

**Background:**

The suggestions in this section are comprised of the collective wisdom and ideas of many of the congregational leaders from across the Diocese of Ontario. In particular, many of these strategies have been developed by those who through trial and error have learned that there is no magic stewardship bullet; there is no one themed program or sermon that magically transforms the giving patterns of parishioners. The realization of this can be likened to that experienced by the chronic dieter who, after many years of searching for the right program, the most sought-after pill, the newest exercise video, finally clues in to the fact that only a lifelong commitment to healthy eating and exercise will eventually, gradually, lead to the realization of a healthy body weight.

Those congregations who have healthy, financially sustainable ministry – those who are able to balance the demands of bricks and mortar with delivering strong and relevant programs in their communities - have done so because they have worked very hard. They have built a strong culture of stewardship by doing the work and taking the steps, one at a time, toward building the kind of plan you see laid out in this resource.

While the bad news is that there's no magic stewardship bullet, the good news is that there are some key building blocks that congregations can use to advance themselves along the path to healthy, financially sustainable ministry. Every line-item on this proposed year-round Stewardship & Communications program is backed up by one-on-one support from the Stewardship and Financial Development Office. Wherever you see **[T]** or **[R]** that means there is an electronic template or resource available through the Stewardship office that can save you numerous key strokes and get you started.

The completion of all of these strategies, when lumped together, might seem daunting at first, however if your leadership team focuses on its strengths to advance even a handful in the first year, and then another handful in the second year, the slow and steady build towards a year-round culture of stewardship will be well on its way.

This table is available in an electronic format so that you can adapt it for your own use and conveniently track the portion set aside for *Team, Timeline and Follow-Through*. There are a number of tasks on this table that can be easily delegated - so think "Team" wherever and whenever possible.

Congregations who have instituted a comprehensive plan for year-round stewardship and communications like this, have seen an increase in givings of between 15 to 20 percent by the end of the first fiscal year. However, even more importantly than the financial results is the impact these parishes have felt in congregational life when donors feel appreciated and more connected because they are better informed about the mission and ministry of their Church.

**YEAR-ROUND STEWARDSHIP & COMMUNICATIONS PLAN**

<b>Timeline</b>	<b>Action</b>	<b>Description</b>	<b>Team, Timeline &amp; Follow-Through</b>
January	Tax Receipts	<ul style="list-style-type: none"> <li>▪ Thank-you letters to be included <b>[T]</b></li> </ul>	
January	Vetting of the Parish List	<ul style="list-style-type: none"> <li>▪ Look at the parish list against the record of tax receipts (names only, not amounts) sent by the Envelope Secretary to capture: disengaged members, and new members. <b>[R]</b></li> </ul>	
	Volunteer Recognition	<ul style="list-style-type: none"> <li>▪ Begin planning of a special service and celebration to honour volunteers in your church and in your community-at-large in advance of National Volunteer Week (NVW) which takes place every year in April/May.</li> </ul>	
January/ February	Annual Vestry Meeting	<ul style="list-style-type: none"> <li>▪ Clear &amp; Concise Financial Reporting <b>[T]</b></li> <li>▪ Narrative Budget <b>[T]</b></li> <li>▪ User-friendly Line Item Budget <b>[T]</b></li> <li>▪ Realistic Givings Projections <b>[T]</b></li> <li>▪ Message of Thanks</li> <li>▪ Volunteer Recognition</li> <li>▪ Deficit Strategy <b>[T]</b></li> <li>▪ Mission &amp; Ministry Objectives Clear</li> <li>▪ Celebrate legacy of memorial gifts (recent and historical) <b>[T]</b></li> </ul>	
January/ February	Annual Vestry Meeting Update	<ul style="list-style-type: none"> <li>▪ Mailing of an executive summary/highlights for the benefit of those who were not in attendance <b>[T]</b></li> <li>▪ Include financial statements or make them easily accessible – i.e. website link, etc.</li> <li>▪ Message of Thanks</li> </ul>	
March/ April	Easter Offering	<ul style="list-style-type: none"> <li>▪ Send Easter appeal with Offering Envelope included <b>[T]</b></li> <li>▪ Can include pastoral message, vision of mission and ministry message, thanks and appeal. <b>[T]</b></li> <li>▪ Letter should go to whole parish list – regular attendees and constituents</li> </ul>	
March/	Easter Service	<ul style="list-style-type: none"> <li>▪ Make sure pews are stocked with Offering</li> </ul>	

April

Envelopes and pens/pencils where people can record name and address.

- If you have a parish brochure **[T]**, make sure it is easily accessible

Date	Action	Description	Team, Timeline & Follow-Through
End May/ Early June	PAG Mailing	<ul style="list-style-type: none"> <li>▪ Send letter to PAGs, include “increase to PAG” form <b>[T]</b></li> <li>▪ Send letter to non-PAGs, include PAG brochure <b>[R]</b></li> <li>▪ Letters should go to all but Constituent Members</li> </ul>	
June	Long-Range Planning	<ul style="list-style-type: none"> <li>▪ This is a great time for a leadership retreat or long-range planning session</li> </ul>	
June/July/ August	Volunteer Program Evaluation	<ul style="list-style-type: none"> <li>▪ The quiet summer months are a wonderful time to assess the current volunteer program against the parish list, and to discern how to more intentionally engage those who seldom volunteer so that they may find their unique place in the Body of Christ</li> </ul>	
August/ September	Training & Development	<ul style="list-style-type: none"> <li>▪ Assess training and development opportunities for the year ahead – many are offered through the Diocesan Centre</li> <li>▪ These are wonderful opportunities for networking and building up skills and leadership capacity within a congregation</li> </ul>	
October	<i>Stewards at Work</i> Mailing	<ul style="list-style-type: none"> <li>▪ Send letter and <i>Stewards at Work</i> Commitment Program brochure <b>[T]</b></li> </ul>	
October	Narrative Budget Team	<ul style="list-style-type: none"> <li>▪ Put together the Narrative Budget <b>[T]</b> Team, provide training if necessary</li> </ul>	
October/ November November	Offering Envelopes Review <i>Stewards at Work</i> Results	<ul style="list-style-type: none"> <li>▪ Order Envelopes for the coming year.</li> <li>▪ Review the results of the <i>Stewards at Work</i> campaign</li> <li>▪ Send letter of thanks to those who took the time to complete it <b>[T]</b></li> <li>▪ Engage specific offers of volunteerism/vision, etc.</li> <li>▪ Record pledges and incorporate into upcoming year’s budget estimates;</li> </ul>	

Timeline	Action	Description	Team, Timeline & Follow-Through
November	Prepare for Annual Vestry	<ul style="list-style-type: none"> <li>▪ The best time to prepare fulsome, clear financial reporting is to start well in advance of Annual Vestry, particularly if a strategy needs to be developed around a deficit budget.</li> <li>▪ Consider adopting the template in Section 6.9 [T] with a view to making your financial statements easier to read;</li> <li>▪ Have your financial statements vetted for jargon by someone who is not in the ‘inner circle’ – for example, are there acronyms that newcomers would not easily understand?</li> </ul>	
November/ December	Advent Offering	<ul style="list-style-type: none"> <li>▪ Send Christmas appeal with Offering Envelope included [T]</li> <li>▪ Can include pastoral message, vision of mission and ministry message, thanks and appeal</li> <li>▪ Letter should go to whole parish list – regular attendees and constituents</li> </ul>	
December	Christmas Service	<ul style="list-style-type: none"> <li>▪ Make sure pews are stocked with Offering Envelopes and pens/pencils where people can record name and address</li> <li>▪ If you have a parish brochure, make sure it is easily accessible</li> </ul>	
Monthly	Financial Update	<ul style="list-style-type: none"> <li>▪ Use Sunday bulletins and other parish communications vehicles [T]</li> </ul>	
Monthly	Visiting	<ul style="list-style-type: none"> <li>▪ Leadership Team should be carrying out regular visits (can include notes and emails) with; disengaged members, new members, others in the community – keeping people abreast of the goings on and how well the Church is achieving its mission and ministry objectives</li> </ul>	

Timeline	Action	Description	Team, Timeline & Follow-Through
Monthly	Month-by-Month Giving Chart	<ul style="list-style-type: none"> <li>▪ If not already done in a prior year, begin the month-by-month givings tracking procedure and keep this going [T]</li> <li>▪ This is for the information of parish leadership; Incumbent, Churchwardens, Council – this is to measure the effectiveness of Stewardship campaign</li> </ul>	
Quarterly	Stewardship Sermons [R] [T]	<ul style="list-style-type: none"> <li>▪ Keep the focus on the Gospel “Why Give”, not necessarily “Why Give to this Church”</li> <li>▪ Sermon can include messages about how givings to the Church are used to impact the lives of people in parish community and the world</li> <li>▪ This should be upbeat and positive, not a dire financial appeal from the pulpit</li> </ul>	
Quarterly	Joyful Celebrations	<ul style="list-style-type: none"> <li>▪ Through a combination of newsletters, Sunday bulletins, parish emails, remember to offer messages of thanks for ongoing support and celebrate progress – focus on the broader picture of generosity, not necessarily just hard numbers</li> </ul>	
Annually	Photographs	<ul style="list-style-type: none"> <li>▪ Recruit a couple of people to take photographs at parish events throughout the year so that they can be used for Narrative Budgets, brochures, Annual Vestry PowerPoint Presentation, etc.</li> </ul>	
Annually	Internal Control Questionnaire	<ul style="list-style-type: none"> <li>▪ Complete the Internal Control Questionnaire [T] (Section 6.10) to see if there is room for improving financial procedures;</li> <li>▪ Inadequate and ad-hoc financial processes have a direct and negative impact on donor confidence</li> </ul>	

Timeline	Action	Description	Team, Timeline & Follow-Through
Annually	Leadership Retreat or Long-Range Planning Session	<ul style="list-style-type: none"> <li>▪ If it is difficult for parish leadership to articulate a set of key priorities for mission and ministry, then a retreat or strategic planning session is in order</li> <li>▪ Once a strategic plan is in place, it should be updated annually, so this is a good initiative to keep on the calendar – in perpetuity</li> </ul>	
Other	Capital Campaigns	<ul style="list-style-type: none"> <li>▪ Capital campaigns can be incorporated into this year-round strategy</li> </ul>	
Other	Gift Planning	<ul style="list-style-type: none"> <li>▪ Congregations who have been through this cycle for a full year should consider adding Gift Planning as a specific strategy for the following year.</li> <li>▪ Contact the <b>Ven. John Robertson</b> (jrobertson@ontario.anglican.ca)</li> </ul>	