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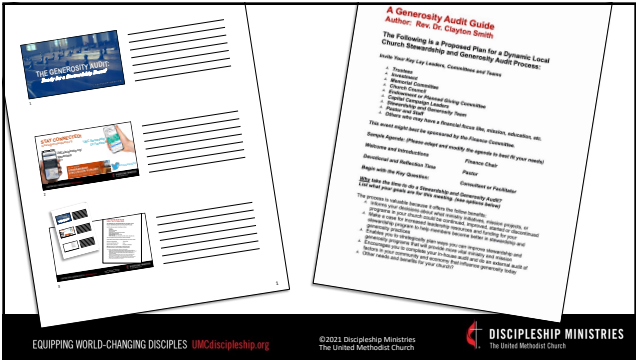
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## POLL: WE'D LIKE TO KNOW YOU BETTER...

### YOUR ROLE:

- ☐ Finance Team
- ☐ Church Council
- ☐ Stewardship Team
- ☐ Interested Laity
- ☐ Clergy

### CHURCH AVG. ATTENDANCE

- ☐ 1-50
- ☐ 51-100
- ☐ 100-200
- ☐ 200-400
- ☐ 500+

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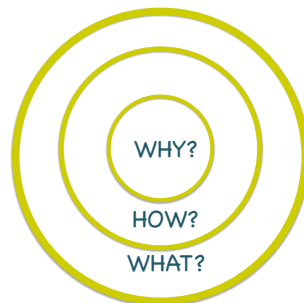
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## Start with Why

by Simon Sinek  
"The Golden Circle"



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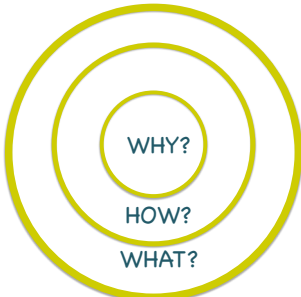
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# Why Take the Time to Do a Generosity Audit?



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# Why Take the Time to Do a Generosity Audit?



- Our mission is to make disciples
- Mature disciples are growing in generosity

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# Why Take the Time to Do A Generosity Audit?

**The process offers the follow benefits:**

- ✓ *Informs your decisions about what ministry initiatives, mission projects, or programs in your church could be continued, improved, started or discontinued*
- ✓ *Make a case for increased leadership resources and funding for your stewardship program to help members become better in stewardship and generosity practices*



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## Why Take the Time to Do A Generosity Audit?

The process offers the follow benefits:

- ✓ Enables you to strategically plan ways you can improve stewardship and generosity programs that will provide more vital ministry and mission
- ✓ Encourages you to complete your in-house audit AND do an external audit of factors in the community/economy that influence generosity today
- ✓ Other needs and benefits for your church?



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## Overview: What a Generosity Audit Might Look Like

1. **Self-analysis:** Do we have an intentional plan for growing generous disciples, and is it currently working for us?
  - Strengths?
  - Weaknesses?
  - Opportunities?
  - Threats?



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## Overview: What a Generosity Audit Might Look Like

2. What **measurable goals** can we set for each of the next 3 years?
  - Is our focus on **MISSION** and not on **BUDGETS, DOLLARS, and DEFICITS**?
3. How do we create a **strategic plan** that will help us achieve those goals?



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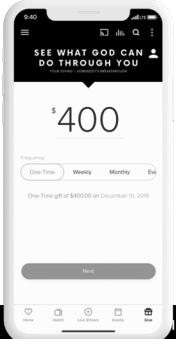
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**Broad Questions...**

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What new models and programs need to be started?



9:40

SEE WHAT GOD CAN DO THROUGH YOU

\$400

Frequency

One Time Weekly Monthly Etc

One Time gift of \$400.00 on December 10, 2019

Give

Home My Profile My Donations My History

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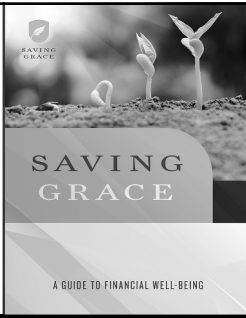
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**Broad Questions to Consider...**

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What financial education and budgeting classes do you offer ?



SAVING GRACE

A GUIDE TO FINANCIAL WELL-BEING

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**Broad Questions**

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Who is in contact with donors and key leaders that could be interviewed: pastors, staff, volunteers, and others?



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**Broad Questions to Consider...**

**6** Does the Stewardship and Generosity Team have a voice and vote on Finance Committee or Church Council?



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**IN CHAT:**

What part of your church's approach to generosity and stewardship needs more attention?

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**Key Areas: Donor Contact**

1. How often do members receive solicitations in worship? Other requests?
2. How often do donors receive a thank you that speaks about the impact of their gift?
3. Do you thank first time donors?
4. Is there a system in place to track relationships, groups, activity?



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### Key Area: Messaging

5. Do you mail quarterly and year-end financial statements?
6. Do you offer age-specific personal financial management classes?
7. Are you reaching different generations?
8. How many communication channels are available for stewardship – email, social media, web, mobile, etc.?



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### Key Area: Projecting Giving

9. How are new members welcomed and expected to return a commitment card at the time they join?
10. Are all members expected to make an annual estimate of giving?
11. How are members who have lapsed/long lapsed tracked?
12. How do you say thank you for those who return a commitment card?
13. What percentage of your members return an annual commitment card?



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### Key Area: Other Appeals

14. How often do you take special offerings?
15. Do you take Christmas Eve and or Easter Mission Offerings?
16. What are the other fundraising events that you have each year?



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### Other Areas to Explore


- Memorial & Enduring Gifts
- Designated and Restricted Gifts
- Endowments and Legacy Gifts
- First Time and Large Gifts

*(See Clayton's handout)*



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### Rating Your Congregation's Generous Giving

How would you rate the effectiveness of your stewardship education and support for these sources of gifts? Rate on a scale of 1 to 10 with 10 being the highest:

<input type="checkbox"/> Spontaneous Giving	<input type="checkbox"/> Designated giving/Donor directed
<input type="checkbox"/> Pledged Giving	<input type="checkbox"/> Planned gifts to Endowment
<input type="checkbox"/> Unpledged/Loose offering	<input type="checkbox"/> Memorial Gifts
<input type="checkbox"/> Special/Emergency Appeals	<input type="checkbox"/> New Member giving
<input type="checkbox"/> Capital project/Building giving	<input type="checkbox"/> Other

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### IN CHAT:

Which one of these areas could be a growth goal for your church?

*Donor Contact – Messaging – Projecting Giving –  
Other Appeals – Memorials & Enduring Gifts –  
Endowments & Legacy Gifts -- 1<sup>st</sup> Time & Large Gifts*



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What has worked  
in the past in  
stewardship will  
not carry us into  
our desired future.

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### Your Strategic Plan

- What are **top 3 strategic needs**?
- Your **greatest priority?** (Annual Campaign? Legacy Giving?).
- **Develop goals that are clear, concise, and measurable** for each priority (based on your church's vision and mission) .
- Do you focus on **one plan/area at a time?**



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### A Generosity Audit Guide

**A Generosity Audit Guide**  
Author: Rev. Clayton Smith  
The following is a Proposed Plan for a Dynamic Local Church Stewardship and Generosity Audit Process.

Invite Your Key Lay Leaders, Committees and Teams

- Trustees
- Investment Committee
- Church Council
- Endowment or Planned Giving Committee
- Church Stewardship and Generosity Team
- Pastor and staff
- Others who may have a financial focus (e.g., education, etc.)

This audit might need to be sponsored by the Finance Committee.

Design Agenda: (Pastor adapt and modify the agenda to best fit your church)

Invocation and Introduction Pastor

Discussion and Reflections Co-Chair/ or Facilitator

Begin with the Key Questions:

How has the church done in a Stewardship and Generosity Audit?

What are your goals for this meeting (one option below)?

- Inform your members about what money resources, mission projects, or programs in your church could be enhanced, improved, started or discontinued.
- Inform your members about what money resources, mission projects, or programs in your church could be enhanced, improved, started or discontinued.
- Explore your church's financial health and how you can improve stewardship and generosity programs that will provide more value to your members and the community.
- Explore your church's financial health and how you can improve stewardship and generosity programs that will provide more value to your members and the community.
- Explore your church's financial health and how you can improve stewardship and generosity programs that will provide more value to your members and the community.

Other needs and requests for your church?

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# Questions?

JOIN US FOR ZOOM MEETING SESSION!

<https://zoom.us/j/6155130070>

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## UPCOMING WEBINARS

Tuesday, August 10, 2021, 6:30pm CDT  
**“What You Really Need to Know about Housing Allowances”**  
*(w/ Bryan Mills, General Counsel, GCFA)*

Tuesday, Sep. 21, 2021, 6:30pm CDT  
**“Cultivating the Craft of Asking”**  
*(w/ Bonnie Marden, Myte Ministries)*

[UMCdiscipleship.org/webinars](http://UMCdiscipleship.org/webinars)

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