

## Generosity Matters – October 2024

Hi All,

Many of you are probably half way through your annual stewardship appeal. Wonderful! I hope your follow up goes well.

Something else that you may want to begin planning for now is finishing the year strongly with current year donations. Doing this is something that is part of annual congregational generosity and stewardship practices. It is also distinct, though adjacent, to your congregation's annual appeal.

One thing we know is that approximately a third -or more- of a calendar year's giving happens in the fourth quarter, most of that occurring Thanksgiving through December. I'm going to share two tiers of considerations in planning your congregation's end of the year (EOY) giving appeal. The first tier is minimally what you want to do. The second is something that may be added to in future EOY appeals (if not already being done). That said, and before going any further, I want to add that what is being shared here is predicated on the belief that generosity is a life that has been witnessed to us in Jesus Christ; that this witness fills us with thanksgiving; that it is a life to participate in; and part of our ministry is encouraging one another to live in just such a way. In other words, by witnessing and encouraging generosity we are engaged in important, soul-edifying, spiritual work. We have been created with the need to give.

### EOY Appeal Prep: Tier 1-

- **October is the time to prepare your message** which you'll want to begin circulating in worship, e-newsletter/newsletter, weekly announcements, Facebook/social media, etc. In **November**, after the Sunday you've announced to be the date estimate of giving cards shall be returned, **you'll want to begin announcing your EOY appeal.**
- As with annual appeals, **you'll want to plan for a response method.** This will include a special EOY giving envelope, though you may have a theme accompanying -or in place of- this title (i.e. EOY Appeal). It may also direct folks to your digital/online giving platform with instructions about how to make such a gift.
- Though tempting, your message should not be rooted in need (i.e. 'We've got a budget gap to cover') or scarcity (i.e. 'If you don't, then this unfortunate outcome will happen'). **Root your message in thanksgiving;** remind people of what your ministry has been concretely about (i.e. impact stories); and have a vision of what shall happen with these offerings and what may happen if you exceed projected giving for the year.
- It is especially great if **lay leaders can craft messages or share announcements** (2 minutes) how and why they are participating in the congregation's EOY appeal with an invitation to join them (i.e. '*...join me!*').

- In your communication be mindful how you will be asking people to make an additional gift and that **this is distinct from other messaging you'll probably be engaged in regarding your annual stewardship appeal follow up**. In other words, this will be done as you will probably be messaging about getting estimate of giving cards returned related to your annual appeal for 2025.
- **Thank** those who respond. Communicate often and broadly the results with thanksgiving!

EOY Appeal Prep: Tier 2-

- **Get your message out** before 'Giving Tuesday' which is Tuesday, December 3 this year.
- **Challenge gifts** can greatly add momentum to EOY appeals. If you have a donor who is excited to see others grow in their giving and may be such an anonymous donor (i.e., someone who will add \$3,000 - \$10,000 to what is given through the congregation's EOY offering), this can add momentum and a spirit of togetherness as every gift matters.
- **With your financial secretary, identify who gave last year but hasn't thus far this year.** This may result in a pastoral care situation, that may only present itself this way. Alternatively, it may mean this is a person/household just beginning to take on the habits of Christian stewardship, and so customized outreach will be appreciated (i.e. handwritten note of invitation). *Remember that more and more of our members/friends do not fully appreciate that our ministries are sustained by our partnerships and local offerings.*
- **Make sure your congregation is prepared to receive appreciated assets, donor advised funds or gifts from traditional IRAs**, and message accordingly. As with all gifts there are intangible benefits, but then there are potential tax savings which are significant as well and may add to the longevity of generosity in the Christian steward's life. The ELCA Foundation can help congregations navigate appealing for and stewarding such gifts. Remind folks that they should inquire about these options with their own accountants and/or financial planner; that ultimately these professionals are the best reference for them when making gifts from appreciated assets, donor advised funds or gifts from traditional IRAs.

In summary:

Have a message that is uplifting, that is, tell the truth about what your congregation has been and shall be doing. Have a response method while helping people envision different pathways to participate as fully as possible. Communicate regularly and in a variety of ways. And say 'thank you' often.

God's blessings be with you, saints!

In Christ,  
Dean