

# **BEST** *Year-End* **GIVING** **EVER**

A Guide For Creating Your  
Best Year-End Giving Strategy

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**WHAT DO YOU  
WANT YOUR  
YEAR-END GIVING  
TO LOOK LIKE?**

The signs are there for you to possibly have the best year-end giving you've had in a while. Why would we say that? Here's why.

The economy overall is doing very well. The equity markets are in record territory. Consumer economic markets are strong.

Consider these data points:

- From April through June last year, Americans put away an astonishing 25.8% of their disposable income, compared with 7.3% over the same months in 2019. That's over three times as much!
- From March 2020 to April 2021, the personal saving rate averaged 18.7%—the highest rate over that length of time since WWII.
- The Dow Jones Industrial average is up 27% since March 2020 (as of this writing).
- The S&P 500 Index is up 31% since March 2020 (as of this writing).
- The amount of funds in “checkable deposits” — not stock and bonds but money people can get their hands on right now — increased from \$19 trillion in February 2020 to \$39 trillion in July 2021! That's more than **DOUBLE!**

These are incredibly positive numbers. In all likelihood, your people have access to plenty of money. The question is, “What would it look like for them to consider the ministries of your church as all or part of their year end giving plan?”

We know the conversations in your church are probably centered around the question of “What does our church look like as our people re-engage in fall 2021?” Your church has been turned upside down for the last 18+ months and you are trying to figure out where you are right now. We wrote a blog post to help you think through that. **We wrote a blog post to help you think through that. Read it [HERE](#).**

And here's the connection: Everything you are doing to encourage and accelerate the re-engagement of your people in fall 2021 can actually be a part of the strategy for your best year-end giving season.

We believe the level of success you will experience in your year-end giving strategy is dependent on how well you prepare. Pastors and Executive Pastors, this is the time to determine what you want your year-end giving to look like. And that's what we want to help you with in this resource.

# 1

## FIRST: YOU NEED TO DETERMINE WHERE YOU ARE

As a starting point, let's figure out where you are right now. Not just in the weekly or monthly or even year-to-date giving totals. But where are you as it relates to your givers?

For example, many churches are experiencing stable giving and yet the number of givers has decreased. It's hard to sustain that over time. Also, we have seen a number of churches whose new givers are way down from early 2020. Given what has happened to in-person church attendance since March 2020, that's not really a surprise.

Have you taken a look at the giver data for your church? There are some things in the giver database that aren't going to be evident when only looking at the giving totals for each week or month.

- How is your income to date for 2021? Are you on track to hit your budget for the year?
- If giving is down, why is it down? Is it a large number of givers? Or a smaller group?
- Have you looked at the giver data lately? How are you doing with new givers? You have to attract new givers every year to replace people who are leaving your church.
- How are you doing with lapsed givers, that is, givers who are leaving your church? Is the rate of lapsed givers more or less than you have experienced in recent years?
- If you haven't looked at your giver data lately, we can do that for you. [Click here to schedule a FREE GENEROSITY PULSE REPORT HERE.](#)

And, as you look at the data and assess where you are, think about this important question: What are the implications of this for the discipleship of our people as it relates to money?

The real point of biblical stewardship is not the funding of your church. That's the effect of what happens when your people give. ***The real point is that we bring people into an encounter with God as it relates to their money and possessions.***

Begin thinking how your year-end strategy can speak into that.

## 2

### **SECOND: WHERE DO YOU WANT TO GO?**

The end of 2021 sets up your ministry for 2022. The pandemic season has had its share of hardships. But, at the same time, it has been full of opportunities for ministry. Many of those opportunities did not exist before the pandemic.

Think momentum at the end of 2021 to start strong in 2022. What would it look like for your church to hit the gas pedal and find new momentum toward a robust ministry year in 2022? In a season like this, your people are looking for something to believe in, something to inspire them. An exciting ministry vision can do just that.

- What do you want 2022 to look like for your ministry?
- What are you trusting God to do in and through your church in 2022?
- You might think about a Vision Sunday in November to cast vision for 2022. Get your congregation thinking about what might be possible.
- Does your vision exceed your resources? What if that could change?
- Think big. If your financial resources increased by 50%, what would you do with it? Do you have a vision big enough for that?

## 3

### **THIRD: WHAT DO YOU NEED TO DO TO GET THERE?**

You have the assessment of where you are now. And the vision of where you believe God is calling you for 2022. The missing piece is, “How do we get there?”

- Gather your core or executive leadership team to discuss. Or perhaps even set up a special task force to lead the way on this effort.
- Set goals based on your current standing and where you believe your church is being called to go for the end of 2021 and into 2022.
- Develop the scope of your year-end giving strategy.



# **INTENTIONAL GIVING MOMENTS**

## **THE GIVING MOMENT IS YOUR WEEKLY OPPORTUNITY TO ENGAGE AND INSPIRE YOUR GIVERS.**

For the remainder of the year, we recommend developing intentional giving moments that will challenge your givers as they walk with you in these last few weeks.

The giving moment (or offering time) is one of the best opportunities to enhance understanding of the theology and practicality of giving to the church, both for people who give in services and those who give outside services. It happens every week. It is a great time to “normalize the conversation” about faith and money in the church.

It is a time to teach and educate your people on the spiritual aspect of giving back to God. Our giving should be an encounter with the Living God as it relates to money and possessions. And the time of offering is a perfect opportunity to speak into that on a regular basis.

It is also a time to inspire and encourage your people with great stories. Stories of the impact your church is having as it lives out its God-given vision and mission. Stories of people who have trusted God at a deeper level for their giving and have seen their lives transformed by it.

Since COVID-19 began to spread across the U.S. in March 2020, most churches are not receiving an actual offering in service. Hardly any churches were even having in person worship gatherings until spring 2021. And what happened for many of them is that the giving moment (or offering time) disappeared from the service. Or, even worse, it was reduced to a tactical announcement on how to give.

Make sure the time is intentional and focused. You spend time intentionally planning every other element of the weekly service. Do the same for the giving moment. Don't leave it to chance. It might be good to suggest talking points each week for the persons who are doing the giving moment in each service.

### ***The time of the offering should always be an opportunity to accomplish at least one of the following:***

- Teach the church's theology of giving and how each person should embrace that as part of their discipleship journey. For many people, even those who have been in your church for a while, there is little or no awareness as to what the Bible actually says about money and possessions. Discipling your people in this area of their lives is key to cultivating a longer term culture of generosity.



- Continue to build a sense of trust that your church stewards money well. Unfortunately, there are too many stories of churches and ministry organizations that have betrayed the trust of their people in the way they used their contributions. It is important to distinguish your church as a place that is trustworthy. Doing this occasionally in the giving moment is a good way to build and reinforce the trust of your church.
- Share stories of people whose giving has been transformed by God's grace. Modeling sets the pace for people to embrace new levels of giving. Tell stories of people on the generosity journey. It is important for people in the church to hear from others who are making spiritual progress in the area of generosity. People respond to examples of peers and fellow members. When people share their giving journey and how God has moved in their lives, it provides an example and encouragement to others in their journey. More importantly, the pastor and other key staff should share their giving stories from time to time. Do not assume that your people know you give, pastor. Let them hear it from you.
- Demonstrate the impact of giving to your church — what happens when you give here (stories, stories, stories!). Connect giving to impact. Regularly unpack stories of impact during the giving moment. How is your church impacting the lives of the people it touches? Givers want impact. It is important to say explicitly, "When you gave, this is what happened." People love to hear stories of their church impacting people with its ministry. Without these stories, it is too easy for givers to begin thinking their gifts don't matter. When they see a story that one of the ministries of their church had an impact on a person or group of people, it reinforces that it does actually matter. Build a sense of, "we could not do this without you!"

During the giving moment, use clear language and eliminate more traditional church terms that newer people do not understand (for example, "tithes and offerings") wherever possible. If you are going to use terms like this, make sure you have accurately defined them as part of your church's theology of giving.

Make sure the person who does the messaging in the offering time is a good communicator and is comfortable when talking about money in the church. A person can be a good communicator but not comfortable on this topic and the congregation senses it. It diminishes the moment. This is a key moment in the service and should be treated as such. Assign it to your best communicators!



**END-OF-YEAR  
RECURRING  
GIVING EMPHASIS**

The last month of the year is a good time for a recurring giving emphasis. Since COVID-19 broke out across the U.S. in March 2020, many churches have seen a significant increase in online giving. However, many of those people are not signed up for recurring giving.

Recurring giving serves both the giver and the church well. It is a win/win situation. The giver gets the convenience and security of knowing their giving will happen every month. The church gets the stable cash flow from scheduled gifts.

### **Is your church prepared?**

Has your church sufficiently planned and prepared to communicate recurring giving on your digital giving platform? Is your congregation set up to continue faithful giving throughout the year?

*Here is a framework to help you communicate recurring giving before the end of 2021.*

### **Three-Week Recurring Giver Emphasis**

- This framework takes place over three weekend services and three weeks.
- Recommendation: Begin the first or second week in November. This allows you to finish before the start of the Christmas season.

### **Areas of Focus for Recurring Giver Emphasis**

- **Offering Moment:** The offering moment should focus on the biblical principles of consistent giving and faithfulness followed by practical applications.
- **Email:** Prepare designated emails or leverage your existing church e-newsletter. Be sure to feature recurring giving as a primary/headlining feature.
- **Social Media:** Set a day for every week of the push for a designated post across all of your platforms.

### **Do you need a three-week push or just a one-week reminder?**

- Over the past year, many churches made the move to online giving out of necessity due to the pandemic. However, consideration should be given to the recurrent faithfulness of giving throughout the year.

**Questions to consider:**

- Did your church experience a significant adoption of online giving over the past year?
- Do you have many “analog” or offline givers who still typically give with a written check? Reach out to them with a targeted email campaign to encourage them to move to a recurring gift through your digital giving platform.
- Are your current online gifts more sporadic? Or are they mostly consistent and recurring? Reach out to people who are giving online but not with a recurring gift and encourage them to sign up for recurring giving.

Discuss these considerations with your team and determine the best path forward for your church.

One final thought regarding recurring giving: Though there is a benefit for your people to have their giving set up to recur automatically, there is also a caveat. Out of sight can be out of mind. Automatic can be autopilot. Remind your people several times a year to look at their recurring giving to make sure it is in line with their current income and their giving intentions for the current year.



# **MAJOR-GIVER ENGAGEMENT**

Year-end 2021 might be the best giving opportunity for your organization in the last two decades.

Engaging major givers in the last quarter of 2021 invites them to join your mission. You're likely underestimating how much major givers can expand your mission during what is historically the most generous quarter of the year for major givers.

Major givers are in a better financial position to give than our view through the pandemic lens might suggest. The financial data tells us that all givers, especially major givers, have greater capacity to give, opening an opportunity that hasn't been seen in many years.

- 80% of households are the same, probably better off, financially than pre-pandemic. Only 20% or fewer are worse off.
- The savings rate, meaning cash available to potential givers, is \$39 trillion which dwarfs the prior \$19 trillion, doubling the amount of money readily accessible for giving.
- Expenditures are down because people are purchasing less. They consequently have more cash on-hand.
- Home values have sky-rocketed to record heights.
- The poverty level is down 24%.

The bullet points above add up to two powerful realities for the usual highest giving period of the year.

1. People are feeling economically strong and confident.
2. More money is available in stored wealth and demand accounts.

The combination aligns perfectly for an increase in charitable giving. The money is there now if...

1. You have a compelling story that illustrates a gripping, absorbing vision that inspires the giver to prioritize giving to that mission.
2. The giver is asked—boldly, inspirationally, thoughtfully, and at the right time while being embedded in a relationship that has earned the right to make a courageous ask.

The 2021 year-end process cannot mirror what you've typically or traditionally done. To default to what is easy, expected and safe will yield minimal financial resources. Now is not the time to run the same playbook you've used year after year.

Quite probably, you have a project that is more mission-critical than ever going into 2022. A new video studio? Multi-site? Facility repurposing? Or a straight-forward leap in your general giving to position you for strength in 2022?

***If major givers provide the greatest percentage of year-end dollars, how might you create a new playbook?***

Multiple other organizations and compelling missions bring their story daily to the attention and heart of your major givers. Your mission becomes an option or the lesser of options unless you intentionally engage major givers in a way that brings your project to the top of their priority list.

Just because a major giver attends your church or gives to your organization does not mean you are their top priority in giving. But you could be.

***Here's how.***

**ALIGNMENT AND RELATIONSHIP.**

- A major giver can have alignment with the vision, but lack trust and connectivity with the organizational leadership.
- A major giver can have trust in you but not care, understand or embrace the alignment with the project.
- Major gifts flow from the duo of trust and relationship.

***You have a brief season to confirm, affirm, or construct trust and alignment.***

The financial ask should occur before Thanksgiving to allow process time, financial planning and the usual holiday delays of normal routines. You'll still likely get the answer and a gift the last two weeks of December.

No alignment, no trust equals no gift. Little alignment, little trust equals little gift. Come up short on either alignment or trust and you'll get a courtesy gift, probably much less than other organizations receiving a financial gift larger than you received.

### ***So how do you build alignment and trust?***

Your most steady major givers probably have trust and a sense of alignment. Your key mission before Thanksgiving is to validate and reinforce that trust and to present the mission-critical project. A cup of coffee with your major givers might accomplish the request.

Infrequent or emerging major givers need a greater trust and dose of vision. An informal, casual group briefing might be enough.

New major givers, well, they may not be so easy. The relationship damage can be long-lasting if you presume on the person or couple without earning the right.

If in doubt, our team can help you frame your major giver strategy for probable major givers and potential major givers.

You'll be reviewing the P & L in January 2022 for December 2021. What do you want your reaction to be? Is OK good enough? Will the status quo get you to where you want to be next year? Or will you be celebrating that people aligned with your mission, trusted the mission climb and joined in the partnership beyond your wildest imagination?

You can determine the January 2022 result by increasing intentionality in the days before Thanksgiving. Record giving during this last quarter of 2021 can be in your win column when you engage major givers.





# **ENGAGEMENT**

Engagement by the people in their congregation is on every pastor's mind as we head into fall 2021. What are some of the chief concerns you are hearing? And what key thoughts and recommendations can Generis provide for these concerns?

- If your concern is, "Will my church come back in the fall? Who will be in the seats?," you should think of the rest of 2021 as a restart. Almost like starting over for some churches. Focus on growing your church with people who have not been there before. How can you reach those people and impact them for Christ?
- If your concern is, "I don't know who is in my church anymore," you should lean into your historically consistent congregants. You do know who is in your church, you just need to know where to look and engage.
- If your concern is, "Our small group culture has gone by the wayside after the pandemic," you should be thinking Now is the time to fortify our small group strategy and stop having a superficial relationships.
- One final concern: You might be thinking, I am so caught up in all of the things you've mentioned, I don't know how I am going to focus on year end giving, which is important to our church. That's actually good news because all of these things are connected to what could be your best year-end giving in quite a while.

All of these concerns and our thinking are covered in more detail in a recent blog post we wrote. [Read it HERE.](#)

**One more thing on engagement.** The November-December timeframe is great for encouraging and engaging first-time givers. It is the giving season. Help people who are not currently giving. Give them a great reason to start. One idea is to create a special giving opportunity. Perhaps one where all of the money goes to a ministry partner in the community. Many people who do not give have a reluctance about giving to the church. No need to go into all of the reasons here. But we know it is a sticking point. So, let's just remove it. A giving opportunity like this is easy to promote because none of the money benefits your church. All of it goes to the ministry partner.

The main thing about creating a special giving opportunity with a partner is that it gets the person or couple in your church accustomed to giving. They have taken the first step. You might consider promoting it on Giving Tuesday, which is the week after Thanksgiving. Giving Tuesday was developed to counteract two of the biggest spending days of the year, Black Friday and Cyber Monday. That's a good idea for a church to get behind, especially as a promotion point for developing first-time givers.



# IMPROVING YOUR STORYTELLING

**DAVE RONNE** - Ministry Strategist for Weekend Experience

I think we can agree that Jesus was a master storyteller. And the power of a well told story is irrefutable. When we tell stories of our people actively trusting God it is in part what inspires other people to take steps of faith, whether that is into community or generosity.

However, most Churches really struggle in this area. I sat down with one of our storytellers James Legg, Filmmaker/Ministry Coordinator at 12Stone, to talk about the problems teams face.

***Here are some common problems churches tend to run into, and thoughts on what you can do in this season to address them:***

# 1

## **WE ARE NOT STUDENTS OF THE CRAFT.**

- This is a bit ironic considering we live in a culture that obsesses over and binges great storytelling. The latest show to binge or the latest documentary series to consume is frequently the subject of conversation when we get together with friends and family. So, it is nearly criminal that the church isn't leaning into being students of this craft. Examples of great storytelling are all around us, both short form and long form.
- Remember, the church isn't just about telling stories of what God did, it is about telling stories about what He is doing now.
- Encourage your creative team to be students of great storytelling.
- If you don't have a video person who is a student of great storytelling, make it your goal this season to find one.
- Find inspiration. For storytellers, be a learner, sites like Master Class, or watching quality documentaries on Netflix and YouTube are helpful.
- Learn how to watch media without being entertained by it. When you feel something, stop, back up the video, and think, Why did that just move me? Be aware when stuff comes up internally as you watch great stories, Reverse engineer what you're seeing, and try it yourself.

# 2

## NOT EVERY STORY DESERVES EQUAL TIME.

- Develop a way to differentiate. James uses something like this: Think of stories as either snacks, meals, or nights on the town. Each one requires a different investment of time and emotional energy.

- **Snacks** (video 1-2 minutes or less; just a good story, not high production; or even just having a person telling it from stage with a picture)

- Here are some one-minute Instagram posts highlighting mission impact.

WATCH

WATCH

- [HERE](#) is an example of a social media post highlighting a clip of the weekend teaching.
- [HERE](#) is a two-minute faith journey story.
- [HERE](#) is a video that breaks the mold for time, and I hesitate to call this a snack, but it is low production and only one camera is used. This is a good example of fueling the missional priority of prayer while using social media. As a church with the missional vision to be rooted in prayer because of Jesus, we set out to do 150 days of praying through the psalms, posting a video every Wednesday to help model what that looks like.

- **Meals** (maybe 1-4 minute video) Higher production value.

WATCH

WATCH

- **Nights on the town** These stories deserve time and creative input, highest production value, more heart, and art, usually multiple interviews, longer timelines.

- Here are two long-form stories of brokenness, faith, and salvation and our missional focus of transforming souls because of Jesus.

WATCH

WATCH

- [HERE](#) is a long-form story highlighting the mission of transforming families, by focusing on foster care.

- Having stories of multiple lengths is helpful to weekend programming. In fact, it allows us to tell many more stories in multiple formats, including social media.

# 3

## **EDUCATE YOUR OTHER STAFF.**

- Stories can come from anyone: Pastors or Campus Pastors, a Lead Creative
- Talk to staff about how to look for a good story. Identify snacks, meals, nights on the town. Story elements that always work well go like this: “It should have been this way... but then this happened... only God could do that.”
- Or motivate the storyteller (video person) to take a walk around your small group leaders or outreach folks and ask: “What’s your favorite story in the last three months?”
- Creative personnel should always be cultivating good relationships with other departments.

# 4

## **LEARN HOW TO GET BETTER AT GOOD STORYTELLING AND INTERVIEWS.**

- A videographer’s pre-interview is where you look to find the true depth of the story. In general people struggle to talk about themselves, and it is the job of the pre-interview to find out if there is a status quo and a new status quo (what has really changed, and the emotion under that). It’s usually something bigger than, “I didn’t go to church and now I do.” Sadly, most churches tend to stop there.
- Curiosity to know more than just the bottom line is key. But this always involves trying to get the subject to start talking.
- When filming, develop an approach to break the ice (*this will feel like the awkwardness of a first date*). Something like:
  - With camera rolling, ask three burner questions such as: How did you come to our church? If interviewing a couple, then ask how did you meet? What do you know the most about? Listen for a bit, just to get them comfortable talking.
  - When you turn to the story don’t just focus on the details, find out what was hard about it—how they really felt. Don’t settle for surface answers. Keep probing with questions like, “Can you tell me when it was worst?”
- Some people are natural storytellers, so let them do their thing. Just help them focus, and coax others when needed.
- Conflict is your friend. The bad parts of a story help us understand the best part. The dark parts make the light parts brighter.
- Interview twice in two locations, particularly if one of the locations is critical to the story. Any way you can make it more real will help tell the story.

# 5

## LEARN THE ART OF EDITING.

- You are looking for the best hook, therefore contrast matters. Use irony, like a question or statement that hooks people early on.
- Editors should focus on getting the least amount of essential information in. Don't overload the audience with detail. You'll often have to go through the story line by line and ask yourself: Does this lead us to the story we want to tell? Bring in another trusted person who isn't as familiar with the story to view the edit and see if it is clear.
- B-roll is key for more long form or highly produced pieces. Think, "not just talking heads. Think, "show don't just tell."
- On big stories, think about separating the shoot. First, focus on only the interview. Then, after the initial edit, move to B-roll, because then you are choosing B-roll more specifically. This is particularly true for a Nights on the Town type of video.
- Use Motion Graphics to vision cast informational pieces. Best for more information, Motion Graphics clarify and visualize much better than talking heads.
- [HERE](#) is a clip highlighting a missional effect to address hunger



# **WEEKEND COMMUNICATION + CREATIVE**

**DAVE RONNE** - Ministry Strategist for Weekend Experience



It is easy to underestimate just how significant a role weekend services and creative communication plays in creating a culture of generosity. Weekend services and creative help keep your mission focus front and center. Senior pastors and creative teams know it is vitally important but the tyranny of the urgent often interferes with truly reaching their full potential. There is no “one size fits all” solution to this, it’s simply a tension that each church must learn to manage.

In this season where churches are rebuilding, redefining, and regathering, it is even more critical that we make the most of the next several months. Your congregation undoubtedly has questions. Questions like: Now what? What is God leading us to next? What’s my role? These questions are most effectively answered in all the stories of how God is moving in our lives and our ministries.

***We must become better at helping our congregations know what God is up to even in these uncertain months. We should be taking a critical look right now at how our weekend services, and creative communication could better communicate the deeply personal stories of how God is using the mission and vision of your church.***

Here are some common problems churches tend to run into, and my thoughts on what you can do this season to address them:

# 1

## **CHURCHES TEND TO FOCUS WEEK TO WEEK, RATHER THAN ON DEVELOPING A MISSIONAL SEASON.**

- Churches tend to focus too narrowly on the weekend or on a sermon series and lose sight of keeping the mission clear. It is unclear because they run from series to series, each week often louder than the vision of the church. Remember, a good hierarchy of messaging for churches is vision first, season second, then weekend.
- Identify the one or two major missional focuses during the next four months. Here is an example: Maybe your missional focus is on spiritual formation and could be summarized by the word community. The most common mistake we make is to focus too much energy on communicating the details and information. Those are important but also look for multiple ways to tell stories of transformation that occur in different types of community—stories of the joy of participation; stories of the call to leadership; stories of the love and care provided to someone who has found true community; and stories of salvation.
- Basically, focus more on transformation than information.
- To do this, you must lengthen the information/vision timeline. Identify a few great examples of transformational community (or whatever you are highlighting) to focus on every month or more. It is imperative to collect your stories now, and plan to roll them out weeks down the line; this ensures the best quality of storytelling and usage.

## 2

### **CHURCHES OFTEN DON'T HAVE GOOD SYSTEMS TO GATHER THE STORIES OF WHAT IS HAPPENING IN THEIR MINISTRY AREAS.**

- This is a common problem. Try to collect stories from as many sources as possible: Pastors, volunteers, small group leaders, and ministry partners. For those with direct reporting lines, make this a part of the weekly rhythm of communication in your team meetings. Churches that are effective in collecting real time stories of what God is doing usually take time in leadership meetings to have leaders share stories they are hearing.
- For those who don't have direct reporting lines, set up a single email address.
- If you have a videographer on staff, they should make it a regular practice to walk around the building during the week asking what God is doing in different ministries (i.e., small groups, outreach, students, children, etc.) looking for stories.
- Collect the stories from these sources, and have your leaders retell these stories in your staff meeting or your series preparation meetings.

## 3

### **CHURCHES HAVE TIMELINES THAT ARE TOO SHORT AND UNREALISTIC.**

- This often stems from underestimating how difficult it is to become good storytellers.
- We will focus on why this matters in the storytelling section below.

## 4

### **CHURCHES DON'T HAVE ANY REAL CREATIVE PROCESS, THUS, UNREALISTIC TIMELINES.**

- A true creative process was a luxury years ago when most churches weren't relying on video platforms and social media as heavily as we are now. However, most churches now rely on video driven content more than ever yet have not fully addressed finding a process that works for them.
- A great creative process in this day and age must understand the importance and potential of leveraging all 168 hours in the week to help keep the vision front and center.
- This allows teams to create not just for the weekend services but also for social media.
- The real benefit of a workable creative process is that it protects your team from burning out season after season.

# 5

## **CHURCHES OFTEN DON'T HAVE THE RIGHT MIX OF VOICES IN THE ROOM.**

- Pay attention to the mix of people in the room as weekend services and creative communication are being discussed. That room should have a broad range that represents various stages of life.
- If the leadership of the church is a decade or two (or three) removed from being digital natives, this is especially important.

# 6

## **CHURCHES OFTEN DON'T LEVERAGE WHAT WE CREATE OUTSIDE OF SUNDAYS WELL.**

- This is now especially important given the trend in weekly attendance patterns that have emerged in the past decade.
- Using social media well during the week reaches many of your regulars who only attend once or twice a month, but still call your church home.
- The most common mistake made by churches is focusing social media primarily on information. The goal should be engagement and stories of transformation.

# 7

## **CHURCHES TYPICALLY DON'T EXPAND TO NEW PLATFORMS OF COMMUNICATION QUICKLY ENOUGH.**

- Often, this is true because we don't have true digital natives in the meetings helping leadership think outside just the weekend services.
- Keeping up with the best tools to connect with younger families in your church is critical.
- Right now, apps like Instagram make it easy to engage, share stories of transformation, and recap a weekend using Insta-stories.

# 8

## **WHAT SHOULD CHURCH TEAMS DO NOW TO PREPARE?**

- If you haven't already identified the one or two most important parts of your mission or vision that God wants you to focus on, gather together now and make a decision. Avoid having too many things to focus on.
- Create a plan for your team to begin finding stories of what God is doing through your congregation's generosity. Pay attention to telling stories from multiple stages and ages of life.
- Remember stats and information are good, but what really brings home the importance of the power of your church's collective generosity is people.
- Spread these stories and information out over the next several months. Remember, provide for a longer timeline of production.
- It is important to realize that not all stories deserve the same treatment. (See more on this in the Storytelling section.)



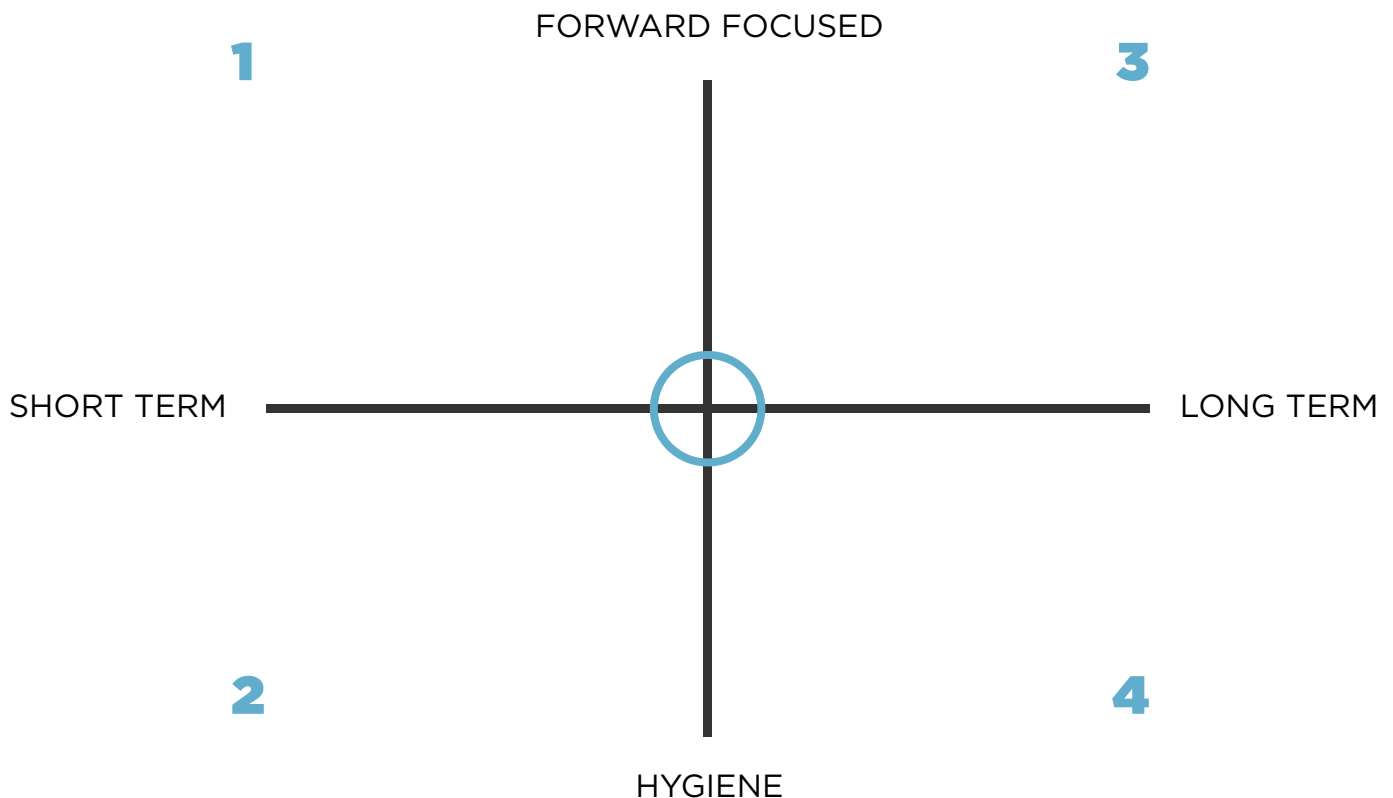
# **YEAR-END GIVING TASKS FOR YOUR BOARD**

**DAVE TRAVIS** - Strategic Counsel to Pastors + Church Boards

Boards need to examine the church’s position in four quadrants with a target in the middle. What are those four quadrants and what should they be doing to build toward a more robust 2022?

This section is designed to help guide your team to a productive conversation on these issues.

**Consider the following diagram:**



As your teams prepare for the year-end giving season, what should the board consider for the calendar year-end? (The circle in the middle is a reminder that we MUST consider our year-end giving initiative.)

Let’s divide up the components into the four quadrants above. Forward Focus means those that are future-focused—items that we should consider now to get an idea for our future. Hygiene at the bottom are items that we need to do regularly to maintain good health for our organization.

In the final months of 2021, you may not need to address all of these but some could be useful.

Let's start in

**QUADRANT 1** - *FORWARD FOCUSED, BUT SHORT TERM*  
(*Meaning, we can set for the following year.*)

- Unique Offerings for 2022 - Will we have any denominational or local causes that we want to support in 2022 that need a particular emphasis?
- Designated Funds Policy Review - When was the last time you examined this? Where will you allow givers to select special gifts in 2022?
- Forward Agenda - Have we outlined for each month, or regular meeting of the board, the area of the church we need a report and deep-dive on?

**QUADRANT 2** - *HYGIENE FOCUSED, SHORT-TERM*

- What is our board self-evaluation? - How do we grade our work, communication, and effectiveness?
- Evaluation of the Senior Pastor - Do we have a well-understood process for this task? A board doesn't have to do it this season, but make sure you have a suitable method.
- Audit - Large churches need a management letter or audit process every year. When was the last time we did this? Have we selected the auditor for 2021 financial reviews?
- RACI - Do we need to reexamine who is Responsible, Accountable, Consulted, or Informed in our congregation for various decisions?

**QUADRANT 3** - *HYGIENE FOCUSED, LONG TERM*

- Culture Reset - Have any recent developments or a pandemic negatively changed our congregational culture? How can we address those in the next year? We won't find a solution in a meeting, but we need to decide if this is a priority for 2022.
- Next Generations Ministry - With changes in volunteer culture within most churches and changing parental expectations, do we need to rework this ministry?
- Residency and Intern Program - Are we missing opportunities to start or rework our leadership development programs? Should we plan to update or launch this area in 2022 to reach younger generations and train new kingdom leaders?

#### **QUADRANT 4** - FORWARD FOCUSED, LONG TERM

- Strategy Reset - Do we have a straightforward next chapter story articulated for our church that empowers people at all levels to accomplish the mission?
- Site Evaluation - For multisite churches, how do we evaluate our current site strategy effectiveness? Do we need to review and refresh in 2022? (Most multisite churches need these every four years minimum.)
- Board Development Plan - How are we identifying, training, and selecting future board members? Do we have a straightforward process?
- Senior Pastor Succession Review - Do we have our emergency plan well understood by the board? When should we start thinking about our long-term plan for Senior Pastor Smart Succession?
- Capital or One Fund Campaign? - Is now the time to consider the financial provisions needed for the church's next chapter of ministry? Do we need to engage with Generis to give us counsel in this area to determine our best course?

***Which area does your board need to consider in 2021 as it looks to the future?***

You can't do all of them, but you can work down a checklist to determine what will need work for the future.

**DOWNLOAD + PRINT THIS SECTION**

**DOWNLOAD**



# **11-MONTH GIVER COMMUNICATION**

**ALAN WILDES** - Vice President



Having an intentional year-end giving strategy is a crucial component to an overall generosity game plan for a church. Many churches think that a year-end giving strategy is complex and for this reason choose not to do anything at all.

A year-end giving strategy needs to be intentional; not complex. One component of being intentional is to communicate early enough so people can make plans in early December for their year-end gift. An 11-month letter and giving statement can begin the conversation and encourage people in your church to think differently about how they might finish 2021 strongly.

### **AN 11-MONTH LETTER SHOULD ACCOMPLISH THE FOLLOWING:**

- **CELEBRATE**
- **INFORM**
- **CAST VISION**
- **PROVIDE A CALL TO ACTION**

### **NOVEMBER LETTER WITH 11-MONTH GIVING STATEMENT**

The purpose of this letter is to encourage and thank the members of the congregation. Most churches are sending this to members and all givers. A letter of encouragement can only have a positive effect on year-end giving.

We suggest this letter be sent in the month of November. It gives people time to plan for a gift and/or to catch up their pledge. Consider sending it with their contribution statements.

The following is a suggested outline for the paragraphs of that letter. These suggestions are in no way designed to distract from your ideas—think of this as a starting point or framework to guide you.

#### **PARAGRAPH #1**

- This year has been challenging in the life of our country and the world as we all have continued to deal with COVID-19. . . . I would not use the word “difficult” in this paragraph.
- Thank you for your faithfulness in attendance, serving, and giving this year.
- God will honor your faith and faithfulness and grow His kingdom.

#### **PARAGRAPH #2**

- *When you receive news online or watch news on TV these days it is often uncertain news. Let me give you some incredibly good news about your investment in God’s work through our church.*

- This paragraph ought to give an update on the positive things that have occurred this last year in your church.
- Include some statistics that reflect changed lives—baptisms, new members, etc.
- Include stories of individual lives affected by the ministry of the church (preferably lives outside the walls of your church).
- Talk about ministries that have been especially effective.

### **PARAGRAPH #3**

- This should be a paragraph about vision and what is ahead for the ministries of the church.
- If you are building, paying off debt, expanding your digital campus, purchasing property, etc., a brief update would be appropriate.
- Give a vision of where the ministry is going in the future.

### **PARAGRAPH #4**

- This paragraph could be used to encourage the congregation to pray about a year-end gift.
- It could be used to encourage new people to give to a capital campaign or an expanded giving initiative if your church is currently involved in one.
- You may want to remind people to catch up on their giving pledges.
- You may want to mention methods of giving other than cash (e.g., appreciated assets, IRA distributions, etc.).
- This paragraph may be used to merely say “Thank you” again.
- This paragraph may be used for a personal note.

A Scripture I often suggest is:

*“This service that you perform is not only supplying the needs of the Lord’s people but is also overflowing in many expressions of thanks to God,”*  
2 Corinthians. 9:12.

This letter needs to be one page. There is more listed above than can be done in a single page. Choose the approach that works best for your church community.



# **CONCLUSION**

You have amazing resources now at your fingertips.

You and your team can tackle year-end 2021 with vital, probable record success.

An athlete can perform well on a self-training regimen. That same athlete can perform even better under the guidance of the right coach, the right experienced voice in their ear.

That's why the deep-bench, experienced team at Generis exists. We are engaged with many churches and organizations right now, helping to make their 2021 financial outcome surpass record levels.

Explore your options with a call where one of us can listen and learn where you are and what you need. We can turn what might be fuzzy into 2020 eyesight. We can help guide your financial year into “amazing” rather than “OK.”

We'd count it an honor to hear you out, discern your unique situation, and get you to where you want—and need—to be.



Schedule a  
*Year-End*  
**GIVING**

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Complimentary Support Call

The best way we can help you develop your best year-end giving strategy is to connect with you and discuss the unique needs and goals of your church.

**GET STARTED**

**BEST YEAR-END GIVING EVER:  
A GUIDE FOR CREATING YOUR BEST YEAR-END GIVING STRATEGY  
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