



## **A CLOSER LOOK: Analyzing Response Methods StewardShop 108**

### **Description**

Participants in this 55-minute workshop learn how to balance ease with effectiveness in choosing response methods for annual congregational funding efforts. Participants learn the relative effectiveness of each method, and examine sample resources employing each of the methods.

### **Audience**

The audience best served by this workshop is stewardship leaders who have passing familiarity with the major response methods, and are looking for fundamental criteria by which to choose methods that best serve their purposes.

### **Skills**

In the workshop participants learn and practice a decision-making process about response methods that balances ease and simplicity with effectiveness.

### **Materials**

Handout, "A Closer Look: Principles and Guidelines for Response Methods," one per participant

Handout, "Six Response Methods Summarized," one per participant

Handout, "Balancing Ease with Effectiveness," one per participant

Handout, "Fundraising Effectiveness," one per participant

Handout, "Looking at Our Response," one per participant

Reprint, "How to Improve Financial Stewardship," one per participant

Booklet, "Stewardship in the Small Membership Congregation," one per congregation

Magazines, "GIVING: Share the Gift," "GIVING: Dessert First," (or current issue of GIVING) one per congregation

### **Schedule**

Presentation, "Taking a closer look at financial response"	15 minutes
Activity, "Analyzing our response method"	20 minutes
Peer Review	10 minutes
Large Group Reactions	10 minutes

## WORKSHOP DESIGN

### **Presentation, "Taking a closer look at financial response"** **minutes**

**15**

Welcome participants to this workshop. Tell them about the skill they will learn during this time together, and the things they will do together to help them learn. Distribute copies of the handouts, "A Closer Look: Principles and Guidelines for Response Methods," and "Six Response Methods Summarized," one per participant.

Offer summary thoughts about the material in the two handouts, including the matters that follow. Refer participants to the handouts for further commentary and for note taking. (If this is a turn-around workshop, participants might want to take notes on a separate sheet of paper, so that they can preserve the handouts as originals for photocopying.) Some important considerations to include:

- There are many methods for distributing and collecting members' written financial commitments, but they seem to be summarized in the six response methods on the handout, "Six Response Methods Summarized."
- In this workshop, we suggest three ways to start the process of choosing which method is best for your congregation:
  1. Analyzing what you have done in the past.
  2. Comparing your choice of methods with mission-funding axioms.
  3. Doing a quick assessment of your capabilities for particular response methods.
- "Mission-funding" is about God, not the budget of your congregation. (An easy point to be made, but fairly difficult to practice in many congregations.)
- The "mission funding axioms" are as true as most axioms, and based on consistent experience and research that is supported by continuing anecdotal evidence. Each axiom is worth brief mention in your presentation.
- It's important to choose a method of financial response for more than one "bottom line" (e.g., securing enough financial commitments). Item 4 suggests other important outcomes from financial response methods, which may strongly influence which methods are chosen.
- A key practice in determining which response method to use is determining the assets available for that response method. In Items 6 and 7, the handout suggests a simple start in assessing the capabilities of a congregation for particular response methods.

Since there is a lot of content to be covered here, it might be a good idea to practice your presentation to assure that it can be given in the fifteen minutes allotted.

**Activity, “Analyzing our response method”**

**20 minutes**

During the next time segment, participants will use one of two tools to begin a process of analyzing or choosing a response method. While you summarize participants’ activities over the next twenty minutes – choosing and using one tool for their own congregation’s response methods– distribute copies of the handouts, “Balancing Ease With Effectiveness: Worksheet,” “Looking at Our Response,” and “Fundraising Effectiveness,” one copy per participant.

Briefly characterize the two tools, noting the following:

- “Balancing Ease With Effectiveness” includes a series of rating scales by which participants can enumerate their views of the relative ease and effectiveness of the response method they are presently using. It also provides a start to asset discovery for response methods.
- “Looking at Our Response” provides a variety of tests by which a response method can be assessed for its effectiveness. A series of four quick surveys are included.
- The handout, “Fundraising Effectiveness,” takes a quick look at the relative effectiveness of various asking methods, informs both tools.

Participants’ tasks for this time segment are to:

1. Briefly review the content of the two tools, looking for possible applicability to participants’ settings.
2. Choose one tool to explore in depth.
3. Use that tool to analyze their congregation’s most recent response method.

Participants should work individually on these tools; sharing and discussion time will be provided later in the workshop. During this time, circulate among participants, answering questions and providing help. Remind participants who wish to use workshop materials in their congregations to write responses on scratch paper so that the materials here can be used as photocopying originals.

**SPECIAL NOTE FOR CONGREGATIONS NEW TO RESPONSE METHODS**

If some participants have come to this StewardShop with no previous experience in using any response methods, their tasks are to:

1. 1. Choose a most-likely response method – one they have considered or might consider using – from the handout, “Six Response Methods Summarized.”
2. 2. Follow Steps 1 – 3 above, imagining how that response method *might rate* if it

### **SPECIAL NOTE FOR SMALL CONGREGATIONS**

If some participants want to look at a response method especially suited to small congregations, give them a copy of "Stewardship in the Small Membership Congregation," for their exploration and analyzing.

### **SPECIAL NOTE FOR CONGREGATIONS WHO HAVE USED MOST METHODS**

Many congregations have, over the course of their fund-raising history, used most of the six basic methods. In that case, you can suggest that they complete the tool they have chosen after they have:

- Looked at the response method(s) in copies of GIVING Magazine.
- Toyed with the idea of a "weekend gifts festival" that features entertainment, a "gifts fair" of some kind, community involvement, and a special worship service focusing on the generosity of members in and beyond the congregation.
- Outlined a "new" response method based on a "ministry fair."
- Described in general terms a response method that involved children and youth.
- Constructed the framework of a method that combines several of the six methods into a "new" response method.

#### **Peer Review**

**10 minutes**

Ask participants to find one other person with whom to share the results of their work in the previous activity. Partners can take about five minutes each to share and receive back the reaction of the other person. (If members of a congregation are attending the workshop together, this is a good time for them to get together and tell what they have done.)

#### **Large Group Reactions**

**10 minutes**

The workshop concludes with a time for the whole group to react to the activities in which they have engaged, or to the tools. You may want to defer participant questions until you have allowed time for participants to debrief the experiences with questions such as these:

- How did you come to find some balance between ease-of-use and effectiveness?
- What might be the key factors in finding that balance?
- What surprised you during your work here today?
- What makes a response method especially effective for your congregation? Why?

Close the workshop with a word of prayer and dismiss participants with a word of thanks for their work here today.



## A CLOSER LOOK

### Principles and Guidelines for Response Methods

As your congregation chooses which financial response method you will use to distribute and collect annual financial commitments from members, you make your choice based on what seems to be useful and beneficial to members. The guidelines and principles on this page help you make that choice.

1. **“Financial response” is about funding God’s mission.** The response of God’s people in offerings of money results in the funding of God’s mission through your congregation. The gifts accomplish good that God wants to get done. Because the church is a collected, visible unity of God’s people, it can do things no singular Christian can do alone. “God’s mission” is both duty and delight; the same is true for mission funding.
2. **“Mission funding” is not the same as a budget.** Budgets are driven by a sense of mission, not the other way around. We must be careful not to confuse the mission (God’s purposes) with the means (the institution of the church). God’s mission is not only “funded,” but also “peopled” with the personal giftedness of members of congregations. The mission of God that we fund and people occurs through our church, but it is directed beyond the church.
3. **Mission funding axioms can be helpful.** You can look at which response method to use in your congregation on the basis of some propositions that have held true for decades. They include:
  - People give to people who ask them to give.
  - Stewardship response methods may grow less effective if they are repeated for more than three years.
  - Mission funding is built on relationships of trust and appreciation.
  - “Giving to budgets” does not motivate most members.
  - There may be generational differences in giving patterns and motivations for giving.
  - Positive results seem to motivate increased giving.
  - Efficiency of a fund appeal method may not be the same as effectiveness.
  - If nothing is ventured, nothing is gained. (Any method of financial response yields greater results than no method.)

**1. An “effective response method” yields more than money.** The major outcome of a response method is the collected commitments for financial support of God’s mission through your congregation. But other benefits apply, some of them as important as the securing of financial commitments. They include:

- Increasing spiritual growth among members. (For example, deepening members’ sense of gratitude, their willingness to trust God’s grace, or their appreciation for God’s work through each other.)
- Drawing the congregation together in common purpose.
- Re-establishing a positive emotional climate in the congregation.
- Gathering energy for opportunities that present themselves.
- Teaching each other about a life of stewardship. (A reminder: “stewardship” always includes “giving,” but includes many other activities of a faithful Christian lifestyle.)
- Increasing the congregation’s capability to be accountable to its members, and their capability to be accountable to God and to each other.
- Widening members’ view of “the church” and what good is accomplished beyond the congregation’s immediate spheres of influence.

**1. Neither “ease” nor “effectiveness” stands alone.** A response method chosen only for its ease may eliminate the possibility of doing anything else except fulfilling funding needs. An effective response method may require capabilities that exceed the available gifts, interest or skill of congregational leaders.

**2. Most congregations have more assets than they realize.** The same axiom is true in the matter of annual financial response methods. (For example, if your congregation chooses only “the financially astute men” as leaders for an annual response method, you may overlook the capabilities of other leaders whose wisdom and gifts extend into matters such as motivation, education, faith-sharing, or thankfulness.)

**3. Your assets are a good place to start.** When you consider which method to use, quickly assay your assets for a time of asking, but also count your capabilities to make the annual financial response a time for:

- fellowship (celebration, fun, relationship-building)
- faith-formation (personal witnessing, biblical teaching)
- worship (thankfulness and praise)
- personal assessment (accountability)
- equipping (lifestyle stewardship)



## **SIX RESPONSE METHODS SUMMARIZED**

### Financial Response in Perspective

Financial response methods vary in their specifics, but all accomplish the same set of goals. This page collects together in one place the characteristics of each of six major response methods. Use the page and the publication, "How to Improve Financial Stewardship," to make your choices about financial response methods that fit your congregation's needs and capabilities. ("How to Improve Financial Stewardship" is available from the ELCA Stewardship Team [800-638-3522, ext. 2563] or at the ELCA web site [[www.elca.org/dcm/stewardship/resources/print.html](http://www.elca.org/dcm/stewardship/resources/print.html)].

#### **Commitment at Worship**

- Philosophy:** Financial commitment is an act of worship.
- Elements:** Good publicity and a high-quality event draw most congregation members to worship, where commitment forms are collected. Guest speaker, special meal usually connected.
- Benefits:** Few volunteers required; brings congregation together in celebratory event. Average response rate.
- Challenges:** High attendance necessary for success of method; follow-up important for those who do not attend. Worship and connected events must be high quality.

#### **Relay**

- Philosophy:** Minimal volunteer work yields maximum member contact.
- Elements:** Members pass package of stewardship information and commitment forms along a route in a kind of relay.
- Benefits:** Easy to plan and execute. Little volunteer training necessary. Response rate better than average.
- Challenges:** Members must live within easy driving distance from each other; minimal personal contact between members; relay chain can get stopped by one person.

#### **Fellowship Meal**

- Philosophy:** Simplicity and profundity of meal (and conversation) offers good opportunity for witness and fellowship.
- Elements:** Entire congregation meets for special meal, fellowship, stewardship presentation and receipt of commitment cards.
- Benefits:** Focused volunteer commitment; whole-group fellowship is inspirational and motivates pledging.



Challenges: As with commitment at worship methods, requires high attendance rate. Effective publicity is a must.

### **Dessert and Prayer**

Philosophy: Commitments are gathered in a less formal devotional setting framed by light refreshments such as dessert.

Elements: The congregation gathers in groups for a stewardship presentation and dessert (or brunch). Commitment cards are collected within the framework of a devotional time characterized by prayer.

Benefits: This flexible method can be inserted easily into a variety of time lines, congregational activities, or leadership styles. Few volunteers are required. Discussion and personal sharing are easily accomplished.

Challenges: "The ask" is not as personal as other methods; good attendance is required for success. General commitment results are shared publicly, which may be risky in some settings.

### **Home Gatherings**

Philosophy: Authentic sharing and personal testimony are made possible by comfortable, intimate surroundings of homes.

Elements: Small groups of members, connected by geographical proximity or affinity, meet in members' homes to hear presentations and make financial commitments.

Benefits: Meaningful fellowship and personal sharing, individualized conversation. Flexible scheduling is possible. Good for large congregations.

Challenges: Good attendance at variety of homes is essential. Requires significant number of skilled presenters and group leaders. Also requires good organization and knowledge of members' affinities.

### **Home Visits**

Philosophy: The best way to ask for members' contributions is face-to-face. ("People give to people who ask.")

Elements: Individuals or teams visit a few individuals or families each; stewardship conversations or presentations take place; questions answered; financial commitment secured.

Benefits: Non-threatening atmosphere; less follow-up; rewarding for visitors; adds to congregation's knowledge of its members' lives.

Challenges: Extensive training and commitment required of visitors. Presumes ability/willingness of members and visitors to talk frankly and personally with each other about stewardship matters. Organization and coordination require good planning.



# BALANCING EASE WITH EFFECTIVENESS Worksheet

Each financial response method brings benefits and challenges to your congregation's stewardship ministry. One way to discern which method is best suited to your congregation's capabilities and needs is to ask about the balance between ease and effectiveness. This worksheet helps you start that conversation.

**RESPONSE METHOD**

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**Major Features**

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**Elements of the ask**

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**Number of person hours  
needed for planning**

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**Number of person hours  
needed for asking**

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**Number of person hours  
Needed for follow-up**

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**Number of person hours  
needed for other elements**

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On a scale of 1 - 5 (with 5 meaning "very easy"), rate the following elements of your financial response program for their relative ease:

- 5 4 3 2 1    1. Finding willing and energetic volunteers.
- 5 4 3 2 1    2. Engaging the congregation (information, excitement).
- 5 4 3 2 1    3. Distributing commitment forms.
- 5 4 3 2 1    4. Collecting a significant percentage of completed forms.
- 5 4 3 2 1    5. Presenting the case for member's contributions.
- 5 4 3 2 1    6. Enhancing the spiritual life of members.
- 5 4 3 2 1    7. Increasing overall contribution levels or percentages.
- 5 4 3 2 1    8. Engaging members in meaningful conversation.
- 5 4 3 2 1    9. Projecting a positive outlook about the congregation's future.
- 5 4 3 2 1    10. Involving new leaders in significant roles.
  
- 5 4 3 2 1    Overall rating for ease of response method.

(See reverse side)

On a scale of 1 - 5 (with 5 meaning "very effective"), rate the following elements of your financial response program for their relative effectiveness:

- 5 4 3 2 1 1. Finding willing and energetic volunteers.
  - 5 4 3 2 1 2. Engaging the congregation (information, excitement).
  - 5 4 3 2 1 3. Distributing commitment forms.
  - 5 4 3 2 1 4. Collecting a significant percentage of completed forms.
  - 5 4 3 2 1 5. Presenting the case for member's contributions.
  - 5 4 3 2 1 6. Enhancing the spiritual life of members.
  - 5 4 3 2 1 7. Increasing overall contribution levels or percentages.
  - 5 4 3 2 1 8. Engaging members in meaningful conversation.
  - 5 4 3 2 1 9. Projecting a positive outlook about the congregation's future.
  - 5 4 3 2 1 10. Involving new leaders in significant roles.
- 5 4 3 2 1 Overall rating for effectiveness of response method.

**GENERAL QUESTIONS ABOUT EASE AND EFFECTIVENESS**

- 1. How well were ease and effectiveness balanced? \_\_\_\_\_  
\_\_\_\_\_
- 2. What do you think will be the long-term effectiveness of this method? \_\_\_\_\_  
\_\_\_\_\_
- 3. What effectiveness might have you diminished in looking for ease? \_\_\_\_\_  
\_\_\_\_\_
- 4. What ease might you have diminished in looking for effectiveness? \_\_\_\_\_  
\_\_\_\_\_
- 5. How do you know when ease and effectiveness have been balanced in a financial response method? \_\_\_\_\_  
\_\_\_\_\_

**ASSETS FOR CONDUCTING A RESPONSE METHOD**

- People \_\_\_\_\_  
\_\_\_\_\_
- Special skills \_\_\_\_\_  
\_\_\_\_\_
- Excellences \_\_\_\_\_  
\_\_\_\_\_

**OTHER COMMENTS**

\_\_\_\_\_  
\_\_\_\_\_



## **Fund-raising Effectiveness** **A Taxonomy of Asking**

In the enterprise of fund-raising, experience and research seem to agree: The more personal the method of asking for contributions, the more effective that method is likely to be. ("Effective" usually means increased contributions, a greater number of donors, higher per donor contributions, greater satisfaction with the organization, and absence of negative factors.) NOTE: However it happens, "asking" is the key to contributions, so no method is completely ineffective. The materials below suggest a general ranking of asking methods by their effectiveness. Use the chart to see where your asking method might rank within this traditional taxonomy.

- 1**  
Face-to-face  
(Team of two with donor)
- 2**  
Face-to-face  
(One person with donor)
- 3**  
Personal letter on stationery  
(Peer to peer, with telephone follow-up)
- 4**  
Personal letter on stationery  
(Peer to peer, without follow-up by telephone)
- 5**  
Personal telephone call  
(With letter follow-up)
- 6**  
Personal telephone call  
(Without follow-up by letter)
- 7**  
Personalized letter  
(And perhaps e-mail)
- 8**  
Telephone solicitation
- 9**  
Direct mail  
(Or impersonal letter)
- 10**  
Fund-raising event

**Insert "Looking at Our Response"**