



THE KEY TO TIMING: Re-scheduling the Annual Fund Appeal StewardShop 107

Description

During the 55-minutes of this workshop, participants develop a plan for a transition away from fund appeals connected to budget-development. Participants examine answers to the questions, “When is it time to think about money?” and “How are stewards formed by our annual fund appeal?”

Audience

This advanced-level workshop especially benefits stewardship leaders who are ready to change the time of year in which their congregations conduct an annual fund appeal. The workshop presumes participants’ familiarity with the relative advantages of seasonally scheduled fund appeals.

Skills

This workshop helps participants plan preliminary steps to change the timing of the annual fund appeal, choosing a visionary approach that separates the budgeting process from the traditional funding appeal.

Materials

- Audiotape, “The Key to Timing,” one per congregation
- Audiotape Player (provided locally)
- Handout, “The Key to Timing,” one per participant
- Handout, “Making Transition Plans,” one per participant

Schedule

Before the workshop	
Presentation and discussion, “The Key to Timing”	(20 minutes)
Imagining the transition	(15 minutes)
Peer review in small groups	(15 minutes)
Wrap-up	(5 minutes)

WORKSHOP DESIGN

Before the workshop

Sometime before the workshop begins, test the cassette tape player and/or sound system to be sure that all participants can easily hear the tape, "The Key to Timing," during the workshop.

Presentation and discussion, "The Key to Timing" (20 minutes)

Distribute copies of the handout, "The Key to Timing: Re-scheduling an Annual Fund Appeal," one per participant. Remind participants who want to offer this workshop in their home setting that they can use this (and other) handouts as photocopying originals and thus may want to take notes on separate paper.

With only a brief introduction – announcing the general idea of the workshop – direct participants' attention to the handout as you play the 8-minute audiotape, "The Key to Timing." Participants will be listening to a conversation between interviewer Bob Sitze and ELCA stewardship leader Nancy Snell. Participants can refer to the handout as they listen to the taped comments.

When the tape is finished, use the remaining ten minutes in this time segment to talk about what participants have heard (and read) about the subject of re-scheduling the annual fund appeal. Use any of the questions on the reverse side of the handout, or some of the following:

- What intrigues you about this idea of separating the processes of budgeting and annual fund appeals?
- What ideas strike an emotional chord for you (or your congregation)?
- How does what you heard (or read) begin to answer some of the concerns that brought you to this workshop?
- From what you heard (or read), what makes good sense about this idea?

NOTE: If you sense that participants have strong difficulty with the concept, address that issue by asking directly, "What seems to bother you most about this idea?" As you hear concerns, first offer other participants the chance to respond so that participants can learn from each other.

Imagining the transition (15 minutes)

When time has elapsed, move directly to the next activity, in which participants imagine themselves moving toward a new schedule in which fund appeal and budgeting are separated by time.

Distribute copies of the worksheet, "Making Transition Plans," one per participant. Remind participants again that their copy can be used as a photocopying original and that they might therefore want to use a separate piece of paper for their notes today.

Briefly introduce the purpose of the activity and explain the items on the worksheet. During the time available to them, participants will complete as many items as possible.

As you introduce this activity – and as you circulate among participants as they work – you might want to be aware of these matters:

- The allotted time allows only preliminary ideas about how participants might begin a transition process, but these ideas will be good because participants' intuitive first reactions to fresh information are most likely accurate predictors of future behaviors.
- Participants should record their answers quickly, in notes rather than complete sentences, so that they can complete as many items as possible, and so that they will be able to recall their thoughts when they share what they have learned back in their congregations.
- If it would be helpful in fitting this activity to their specific context, participants can change the questions slightly.
- Unless it seems necessary, try to avoid the temptation to continue discussing this matter. This can keep participants from using their imaginations, and from the "active learning" portion of this workshop. Gently suggest to those individuals who want to keep talking about the idea that they try completing some of the prompts, "just to see how it might work."

Peer review in small groups

(15 minutes)

Direct participants to find one other person with whom to share their work on the worksheet, "Making Transition Plans." This person will also offer helpful critique of their ideas. Each person will have about seven minutes to share ideas and receive comments. (If several members of the same congregation are attending this workshop, they may want to work together at this time.)

When about seven minutes have elapsed, inform participants that it is time for the other partner to share ideas and hear helpful criticism.

Wrap-up**(5 minutes)**

The workshop ends with a few comments you offer in conclusion. Draw your closing thoughts from the ideas you have heard while circulating among participants during their individual and partnered working time.

If time remains, you might also offer encouragement to participants as they take home what they have learned today. Among the possible matters to share are these:

- Today's workshop illustrates the good that can come even from conversation about the subject. Even if you can't execute your complete plan for transition into a new way of thinking about budgets and fund appeals, begin the conversation as soon as possible.
- If you teach or share what you have learned with someone else within 24 hours of returning home, you will have a better chance of remembering and using the information.
- Use the content of this experience today to begin deeply satisfying examinations of how your congregation conducts its stewardship ministry. Think about other matters – e.g., how you ask for contributions, the actual motivations of givers, how you foster generosity, how you form stewards for all of life – and consider exploring how they can be revitalized.

Send participants home with your thanks and a word of prayer for safe travels, a courageous spirit, and thankful hearts.



THE KEY TO TIMING

Re-scheduling an Annual Fund Appeal

This handout summarizes the main points of the audiotape, “The Key to Timing,” and adds some items for discussion and sharing. Use these ideas to begin the process of re-timing your congregation’s annual fund appeal.

The main idea

Congregations can improve the quality or effectiveness of annual fund appeals by separating the budgeting process to another time of year.

A “good time of year” for fund appeals

There is no perfect season of the year for every congregation. Typically congregations consider fall a good time for securing commitments for support of God’s mission in their congregations, but spring is also good.

The most important consideration: the rhythms of a program year, the amount of time and energy available within the congregation’s life together. In that light, fall may be a time when only limited energy and attention are given to the profound possibilities embedded in an annual fund appeal.

Reasons for separating budget-making from fund appeal time

1. Giving is a spiritual matter. If “budget-funding” is the imagined motivation for the fund appeal, other matters – responding to God’s generosity, taking stock of one’s life, praying – might be diminished.
2. Most research indicates that people do not give to budgets; “meeting the budget” is not an effective or sustaining motivation for giving. Spirit-gifted people of God want to make a difference with their lives, and with the money with which God entrusts them.
3. When budgeting and funding processes are separated, the congregation benefits from the cumulative effects of mission interpretation and stewardship education. Hence, information about the effects of contributions, and a full realization about life-related stewardship can support and motivate generosity.
4. Because of the start of “the program year” – e.g., Sunday school, committee activities, classes – energy and time aren’t always available in fall. Sometimes the end result is that the annual fund appeal is not done well. Another time of year may offer more energy.

5. When budgeting and funding process are separated, each benefits from more focused attention.
6. A program of stewardship education -- including biblical wisdom about money and generosity – can be expanded to include more content.
7. Because congregations regularly add a “faith factor” to the total amount of collected financial pledges, their utility as accurate predictors of member giving is diminished. The most accurate predictor of future giving is past giving during a calendar year; these statistics are available at any time of year, not just in the fall.

Moving either budgeting or the annual fund appeal

Because of legal requirements – e.g., the congregation’s present fiscal year – it may be easier to move the financial response program than the budgeting process. Either is possible, of course.

The time between

Congregations may wonder what happens during the time between budget preparation and the annual fund appeal. Will contributions fall off or givers forget? The answer: Because people don’t give to the budget, and because their motivation for giving won’t be confused with the spending plan of the congregation, they will continue or increase their giving.

Which congregations can try this approach

Any congregation could try this, except congregations in conflict, those experiencing a change in pastors, or congregations where energies are needed elsewhere. The congregations that have tried this approach get into its rhythm. They report success, especially in the removal of fear (about “meeting the budget”) and in members having a clearer sense of why they give. This approach is very freeing for members and leaders, because it puts giving and budgeting into a long-term perspective.

Items to talk about

1. How harried or hurried is your congregation’s annual fund appeal?
2. When, in the rhythms of your congregation’s life, is a time when energy for a fund appeal would be more readily available?
3. How dependent, really, is your congregation’s budget-making process on the actual total of financial commitments?
4. In this matter, what are you afraid of? What do you most hope will happen because of the budgeting and fund appeal processes?
5. What would be a first step toward separating budgeting and an annual fund appeal?
6. What questions do you still need answered in this matter?



MAKING TRANSITION PLANS

Worksheet for Re-scheduling Fund Appeals

This worksheet helps you begin to make plans for moving from your present schedule of connected budgeting and fund appeal processes toward a calendar-separated relationship between the two. Complete the items on this worksheet to begin your transition.

The first person(s) to talk with:

A likely place and time to introduce this concept:

What about this idea that will appeal to these persons:

A likely process of formal decision-making this idea will follow:

What questions I'll have to answer (and some possible answers):

Imagining this actually working in my congregation – two years after its first acceptance – I can see these differences in our congregation's life together:

How important decisions actually get made in our congregation:

What I will pray about in this matter:
