



Planning Your Pledge Drive

Friday Forum, November 17, 2023



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Stewardship FOR US
Building Cultures of Generosity and Commitment

Chalice Lighting

Be inspired with gratitude for the wondrous gifts that are yours,
And be filled with the resolve to share them with all who are in need.
Hold precious one another, and the world which provides us with
sustenance and beauty.
And let a song of thanksgiving be on our lips and in our hearts.



By Rev. Marta Flanagan,
First Parish Unitarian Universalist of Arlington, MA



What We Will Cover

- Building Your Team
- Strategies
- Partners in the Drive
- Giving Guidance to Your Congregants
- Communications
- Double Drive: Online and In-Building
- The Joy of Asking for Money



Building Your Team



Recruiting Volunteers and Advocates

- Personal asks
- Making it do-able
- Clear training up program
- Visible offboarding
- Having fun
- Spiritually nurturing
- Bring in the Board, the SJ folks, the COM



Drive Strategies



	Key Elements	Success Factors
Personal Stewardship Conversations	<ul style="list-style-type: none"> • Visiting stewards to meet with as many pledging families as possible • Direct, personal ask 	<ul style="list-style-type: none"> • Recruiting • Training and support • Monitoring and nudging • Communication to encourage visits
Commitment Sunday	<ul style="list-style-type: none"> • Single event where most people pledge • Extensive build-up of communication and inspiration • Leadership event or personal ask 	<ul style="list-style-type: none"> • Motivational speaker • Leadership ask • Advance communication • Event must be inspirational
Cottage Meetings	<ul style="list-style-type: none"> • Small group gatherings combining social and pledging • Planning, scheduling, and logistics 	<ul style="list-style-type: none"> • Recruiting • Logistics, organization, and process • Multiple capable askers: Script
Generalized Communications	<ul style="list-style-type: none"> • Calendar • “Case for Support”: key messages and theme • Multiple media – Website! Worship! 	<ul style="list-style-type: none"> • Design and tech capability • Warmth and personality • Materials for diverse learning styles

Drive Partners

Engage partners for an all-congregation process

- Minister/worship team
- Administrator
- Communications (newsletter, email blasts, web page)
- Membership
- Board
- Finance Committee
- Religious Education (adults and kids)



Giving Guidance

- Simple, direct, clear
- Guidance adopted and used by the leadership
- UUA giving guide → values-based
- Share giving stories
- Talk about the spiritual grounding for stewardship
- Explain expectations to new members
- Communicate about the state of money in the congregation
- Mission/Program Based Budgeting



<https://stewardshipforus.com/wp-content/uploads/2015/02/NEW-Fair-Share-Contribution-Guide-S4Us.pdf>



Communications



Create a communications plan and schedule

- Timing of messages – before, during, after
- Know the specific aim of each message – participation AND generosity
- Media
- Publications
- Pulpit testimonials
- Letters
- Reporting
- Photos, names, stories

Make it warm and personal – these are your people!



Two Ways Are Better than One!

Before Pandemic

- ✓ In person testimonials
- ✓ In person worship theme
- ✓ Collection basket or plate
- ✓ Handouts/order of service
- ✓ Group gatherings
- ✓ Bulletin Boards/Posters
- ✓ Pledge Table
- ✓ In person conversations
- ✓ Coffee Hour conversations/celebrations



Now = BOTH!

During Pandemic

- ✓ Video Testimonials
- ✓ Virtual worship theme
- ✓ Donation information on slide and in Chat
- ✓ PDF on website
- ✓ Email blast messages
- ✓ Virtual gatherings/celebrations
- ✓ Virtual coffee hour
- ✓ Zoom personal conversations
- ✓ Postal mailings



Make Giving Easy

Lots of Options for Giving:

- ✓ Check/mail or deliver in person
- ✓ Electronic Funds Transfer
- ✓ Auto Bill Pay
- ✓ Credit Card
- ✓ Pay Pal
- ✓ Realm
- ✓ Mobile by text
- ✓ QR Code in order of service
- ✓ Stock transfer
- ✓ Donor Advised Fund

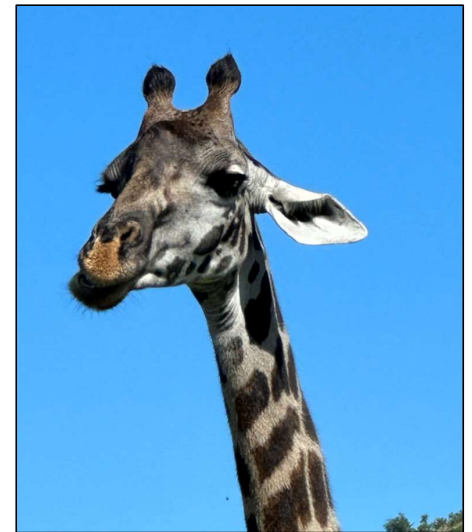


APPS
Realm
VANCO
Give++
Tithe.ly
easyTithe
Givify



The Joy of Asking

- UUs are very charitable and give to things they care about
- It is a *commitment* to the congregation's mission
- You are inviting people to greater belonging
- Creates new and/or deeper connections with people
- We believe in our mission
- Giving to our congregation is an effective charitable gift
- Stewardship is part of adult spiritual development
- People who “ask” often find it is enjoyable!



**Share; Explain;
Ask; Thank
= SEAT**



Closing Words

Blessed are you who live here. This space between simple categories and easy answers.... And blessed are you who realize that love and beauty and courage and meaning live here too....

In the way love and courage show up through people, through presence, through laughter.... May you find comfort in the fact that you are not alone.... So blessed are we who live here, together.



By Kate Bowler,
Excerpted from 11-14-23 Podcast *Everything Happens*



Stewardship for Us

*Thank you for your
stewardship
ministry!*



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