

ECF First Step Webinar

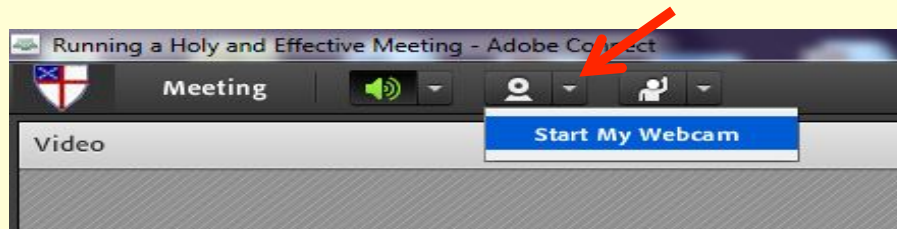
October 6, 2016

Erin Weber-Johnson, Program Director of Strategic Resources

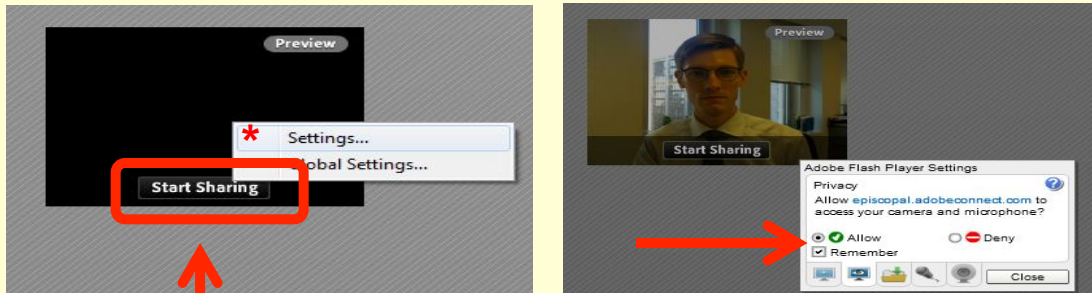
A few tips for turning on your webcam and asking questions

To Start Your Webcam

1. Click on the Webcam icon

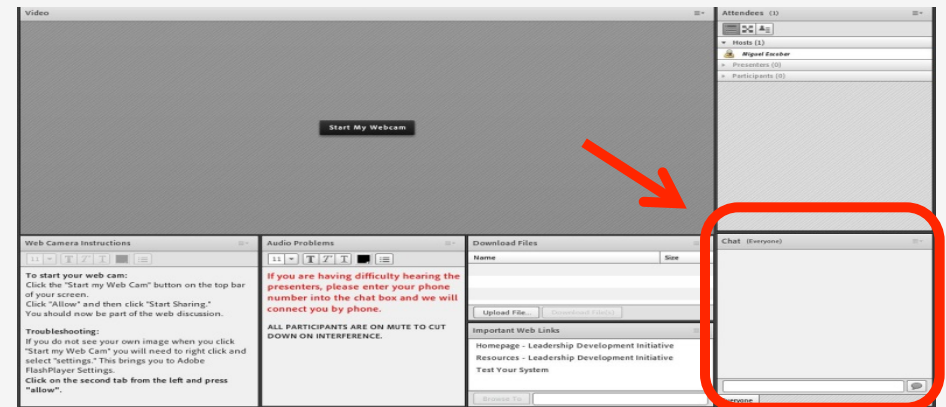


2. Click 'Start Sharing'

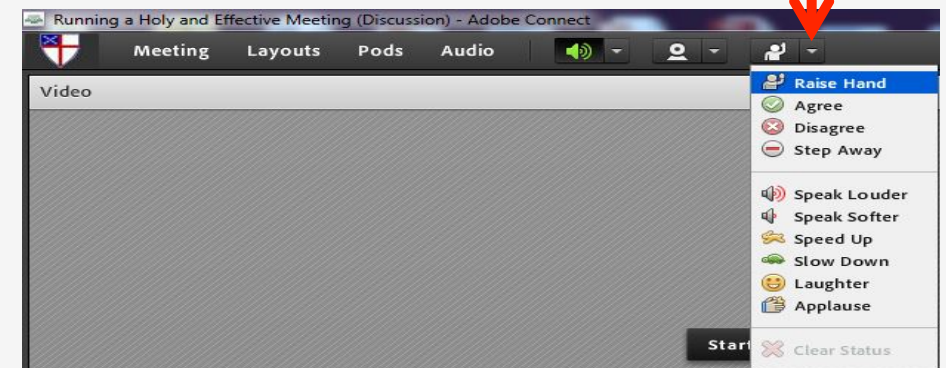


* If it doesn't work, you may need to **right click the box** and then click "**Settings...**" Then switch the settings to '**Allow**' in the above right image.

Ask a Question



Use the chat box at any time - type in your question or comment.



During the presentation, you can raise your hand as shown above.

Technical Notes

- ECF may need to mute all participants to limit background noise and audio interference
- To start your web cameras, press the “Start my Web Cam” button and “Start Sharing”
- If you have questions, please type them into the chat box on the right-hand side of the screen
- PDFs of the slides and resource list are available for download
- This webinar is being recorded and will be made public



The Episcopal Church Foundation (ECF)

Independent, lay led organization, founded in 1949

Empowers congregations through visioning and planning, leadership development, and raising financial resources for ministry

Through our programs, ECF is helping to build a Church characterized by:

- Lay and clergy leaders work together to transform the Church
- Healthy, vital, vibrant Episcopal communities of faith
- Meaningful opportunities for Christian stewardship and effective fundraising
- Innovative, mission-based ways to be the Church of the future



ECF First Step Webinar

October 6, 2016

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Who we are:

- The mission of The Episcopal Church Foundation is to strengthen the strategic leadership and financial capabilities of Episcopal congregations, dioceses, and related organizations to pursue their mission and ministry.

Who we want to be:

- The vision for The Episcopal Church Foundation is to be a **comprehensive and holistic resource**
 - that helps revitalize Episcopal communities of faith.

WE WANT TO WALK WITH YOU



WHAT IS ECF FIRST STEP?

ECF FIRST STEP

FIRST STEP

ECF First Step was designed specifically for parishes wondering where to begin. It was intentionally designed for use by small groups of three or four individuals as part of a collective conversation.

Initially tested by focus groups in February 2016 both at the Church Leadership Conference at Kanuga and the Consortium of Endowed Episcopal Parishes, this tool is now available for parishes nation-wide.

Its purpose:

1. Help parishes articulate challenges and/or needs as a first step towards prioritizing needs
2. Offer leaders the opportunity to talk with someone at the Episcopal Church Foundation.
3. Share some basic information about a congregation to help our staff prepare for the initial conversation.
4. Provide participants with links to resources for congregational leaders.

The assessment tool can be [printed](#) or taken online [here](#).



OVERVIEW

ECF FIRST STEP

CONTACT

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Program Director
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RESOURCES

What it is not:

A diagnostic tool for organizational wellness

ECF First Step: An Assessment Tool for Congregations

Where to begin?

1. Working with congregations, we often find the areas of greatest challenge fall into one of three categories: strategic visioning and thinking, leadership, or financial resources. Please identify the option that best describes the area your congregation finds most challenging today.

- Strategic Visioning and Thinking:** Planning for congregational growth, clarifying a congregation's mission, vision, and overall purpose, developing a strategic approach to planning and decision making, identifying short and long-term goals, tracking progress on goals, etc.
- Leadership:** Vestry leadership, clergy leadership style, conflict among leadership, decision-making practices, recommended practices for leading leadership teams, volunteer recruitment practices, nomination and election processes, creating group behavioral norms, and accountability, etc.
- Financial Resources:** Parish finances, creating effective annual stewardship campaigns, developing realistic and understandable annual budgets, capital campaigns, planned giving programs, creating an endowment and restructuring endowment policies, etc.
- Other** (You will have an opportunity to describe this in more detail in the next section.)

Prev

Next

Strategic thinking vs strategic planning

Common problems with strategic plans:

- Generating more goals than can be reasonably pursued
- Mistaking goals for strategies
- Expecting strategies to fit in rigid time lines
- Forecasting 3-5 years into the future from a snapshot in time

Source: David La Piana, *The Nonprofit Strategy Revolution*.
Fieldstone Alliance: 2008



In light of today's pace of change, is it still reasonable for congregations to do 3-5 year plans?

Strategic thinking vs strategic planning



Real-time strategic thinking:

- Iterative and ongoing
- Identifies congregational goals that are aligned with long-term vision
- Identifies strategies for reaching those goals
- Evaluates long-term and short-term strategies in light of mission, financial capacity, an organization's uniqueness, and more.

Evaluating proposed strategies



Goal: Increase funding for our ministries over the next ten years?

Proposed strategies:

- Annual fundraising events
- Leverage building for rental income
- Start generating revenue through a small enterprise
- Do a capital campaign to alleviate payments on debt

What criteria will your church use to focus on the best idea of the bunch?

Evaluating proposed strategies

Example questions in a strategy filter:

- Does this support our mission and vision?
- Is this unique or does it duplicate others' work?
- Is this financially sustainable through potential gifts or fees?
- Is this consistent with our identity?
- Do we have the internal capacity to begin and sustain this initiative?



How will your leadership team set the terms by which to evaluate proposals?

Any Questions?



- What are your congregation's ministry strengths?
- Does your congregation's mission and vision reflect those strengths?
- Does your congregation have a hopeful vision of its future?
- If your congregation has a strategic plan, how frequently does it review its plan?
- Do you understand the difference between a hopeful vision, goals related to that vision, and strategies for achieving those goals?

ECF FIRST STEP

TOOL PREVIEW: STRATEGIC SOLUTIONS

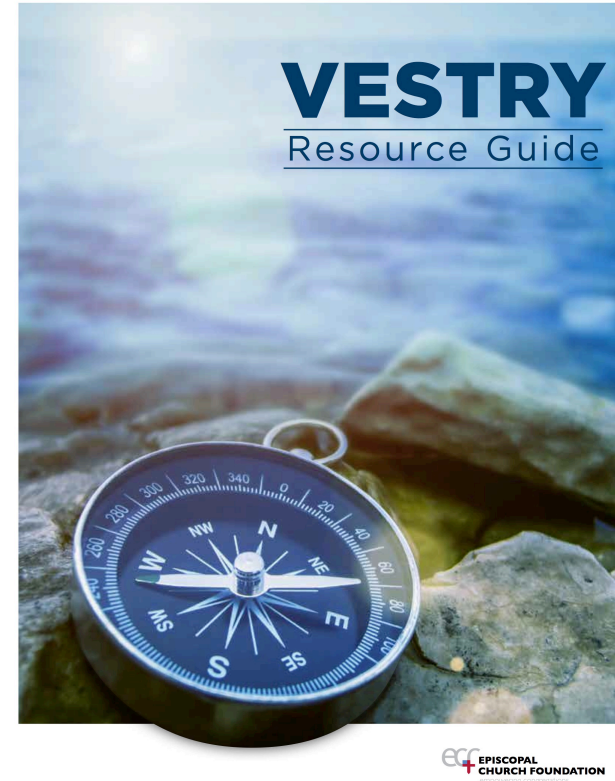
QUESTIONS?

Leadership Resources

Available in both English and Spanish

Collaboration with Forward Movement

Provides information on the role of the Vestry, Visioning, Finance, and Leadership



CALENDAR

PROGRAMS

ABOUT

WAYS TO GIVE

Vital Teams



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SEPTEMBER 2016

Why We Give

Nancy Davidge shares how leaders at St. Paul's willingness to try something different was the catalyst for their successful annual giving campaign. [More](#)



Vital Posts Blog [more](#)

Your Pledge Dollars at Work
 Posted by Nancy Davidge on Sep. 27, 2016
 ...Or, going forth into the world to love and serve with joy. The letter was from Commonwealth Shakespeare Company. Another solicitation from an organization my husband and I suppo...

Stewardship Beyond Obligation
 Posted by Linda Buskirk on Sep. 26, 2016
 "Stewardship" is a topic about which I've heard and prayed throughout my Christian journey. Having grown up in the church, at first I became aware that "stewardship happens in..."

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Resource Guide

ecc EPISCOPAL CHURCH FOUNDATION

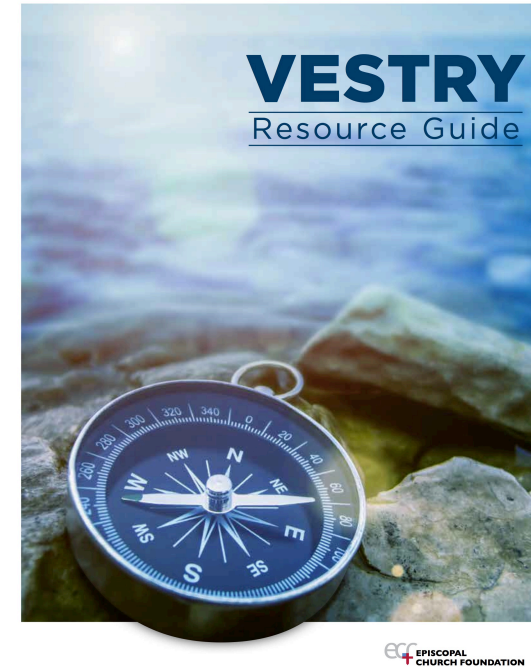
Tools [more](#)

Pledge & Plate Worksheet
 Analyze giving and pledging trends in your congregation

Digital Giving Models & Tools

Leadership Resources

- Webinars
- Church Leadership Conference at Kanuga
- Leadership Workshops
- Vital Teams Leadership Academy



ECF FIRST STEP

TOOL PREVIEW: Leadership Resources

Questions?



Different Types of Giving

Annual

- Funds operations
- Donor gives from cash flow
- Tied to daily mission & ministry

Capital

- Funds specific projects, often related to building
- Donor gives from assets
- Tied to future/growth of your mission

Planned

- Funds perpetual activities
- Donor gives from estate
- Tied to the continuation of your mission

Resources to Fund Mission and Ministry

Three Sources

- Annual Stewardship (Annual Giving)
- Capital Giving (Extraordinary Giving)
- Planned Giving (End of Life Giving)

“Where your treasure is, there your heart will also be.”

--Matthew 6:21



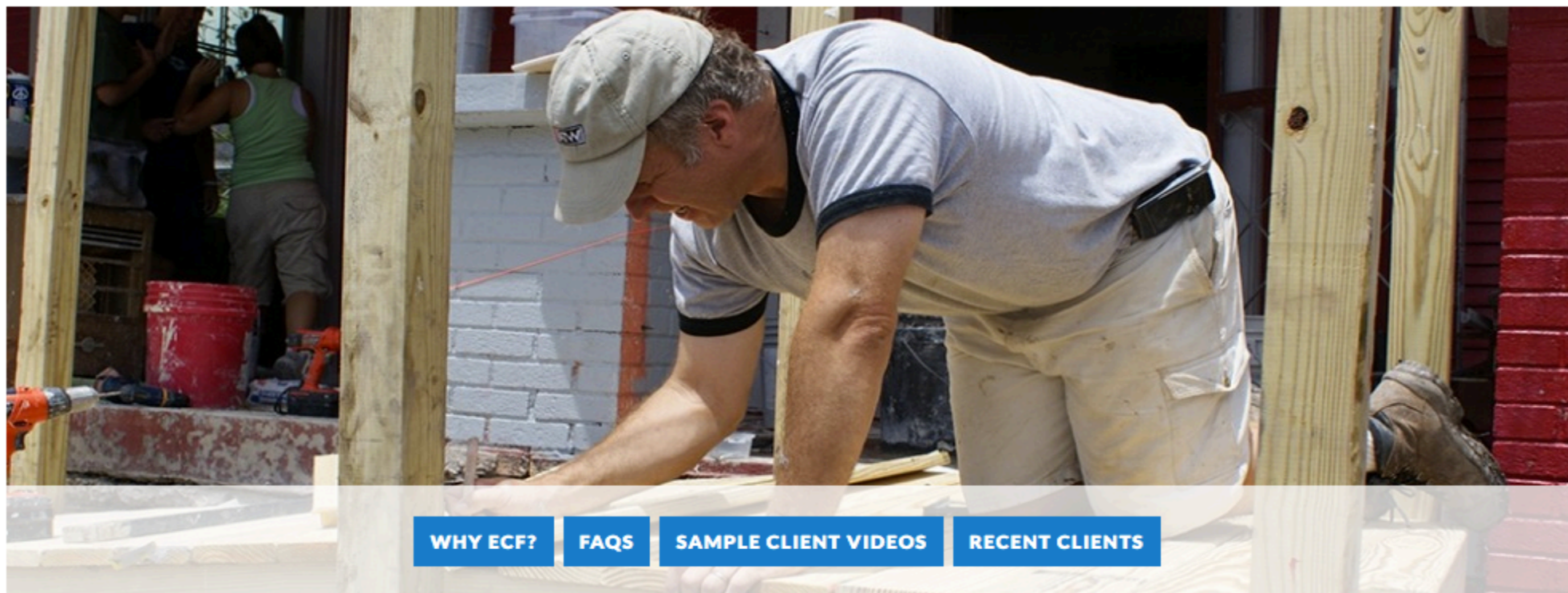
Annual Giving & Development

[TRAINING](#)[TOOLS & RESOURCES](#)

When your parish or community of faith works with ECF to develop an effective annual giving and development program, you will learn that acts of giving aren't isolated events. ECF embraces a holistic approach to combining theological understanding with practical tools and information. So whether you need to empower everyone in your parish to advance your mission, or are looking to improve the efficacy of your current efforts, want to link your annual drive with other fundraising activities, or are ready to

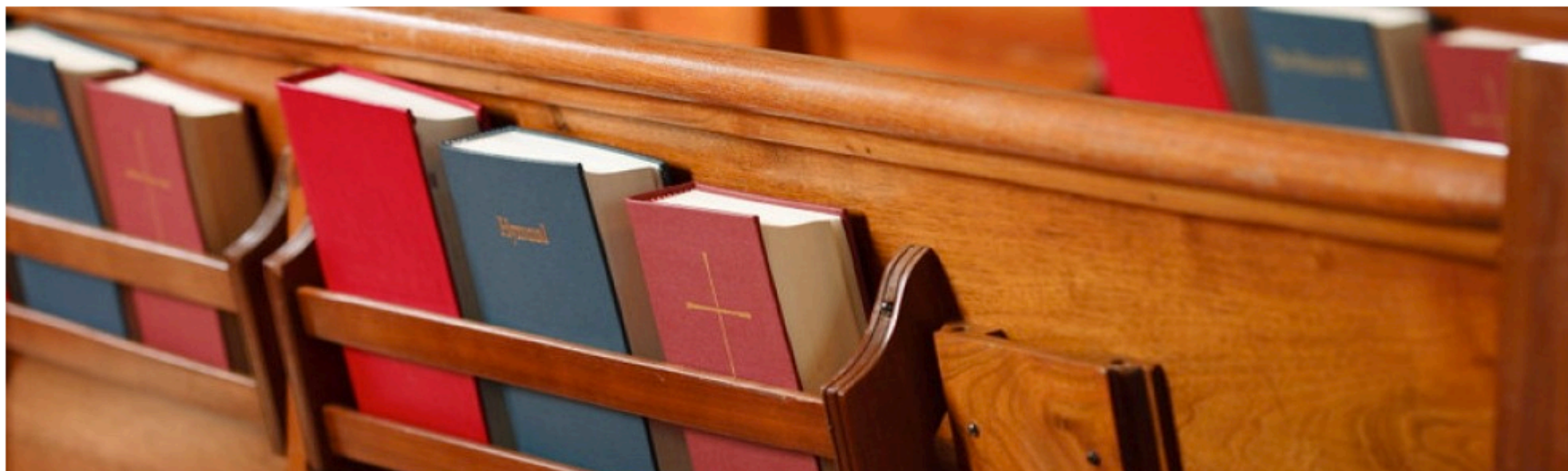
[CALENDAR](#)[PROGRAMS](#)[ABOUT](#)[WAYS TO GIVE](#)

Capital Campaigns



A successful church capital campaign requires prayer, a clear vision, and the support and involvement of your members. Effective leadership and a step-by-step plan will result in achieving your financial goals, strengthened relationships, and a heightened sense of community. A capital campaign allows you to identify new leaders, create opportunities for service, and focus on how to tell your story.

Endowment Management Solutions

[CURRENT ACCOUNTS](#)[PROSPECTIVE ACCOUNTS](#)[GENERAL INFORMATION](#)

ECF has helped hundreds of Episcopal dioceses, churches, schools, and church-related organizations **organize, invest, and grow** their endowments and permanent funds. Our Endowment Management Solutions (EMS) program covers the complete spectrum of endowment needs from starting an endowment fund, to updating endowment policies, to investing prudently and spending wisely. ECF's commitment to responsible endowment management reflects our belief that endowments breathe new life into a congregation, make new ministries possible, spark creative outreach projects, and ease the

Planned Giving

[PLANNED GIVING LEADERS](#)[PLANNED GIVING DONORS](#)

Healthy and vibrant future ministries in Episcopal congregations, schools, and other organizations will be built upon the legacies we leave today. Many of our Episcopal institutions exist because past generations cared so much about the future of the Episcopal Church and expressed their caring by creating planned gifts. ECF has provided planned giving services to the Episcopal Church since 1995. We have distributed more than \$23 million in planned gifts to Episcopal dioceses, congregations, and organizations nationwide, and we manage over \$40 million in charitable gifts.



ecf



empowering congregations

ECF FIRST STEP

TOOL PREVIEW: Financial Resources

Questions?

<http://www.episcopalchurchfoundation.org/programs/strategic-solutions/first-step>

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