



HOW TO CONDUCT A SPECIAL APPEAL

A Special Appeal can provide an opportunity for members and others to make a one-time contribution to the church for a specific purpose. If handled carefully, Special Appeals can aid giving in the parish over the long term. This guide is designed to help leadership determine whether or not to conduct a Special Appeal and provide guidance to help make it a success.

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“Where your treasure is, there your heart will be also.” —*Matthew 6:21*

When is it appropriate to hold a Special Appeal?

Special Appeals normally work best when there is a one-time cost that the church is facing for a specific project or need—different from those covered in a large-scale capital campaign. This might be:

- A building project—a leaking roof, new boiler, rectory renovation, organ refurbishment/replacement
- A mission/ministry project—such as funding camp scholarships, a youth or adult mission trip, feeding or other outreach programs, or perhaps creating a Special Fund for a Youth project or a pilot project for enhancing Christian Education

When you see a numbered arrow, just click it to delve deeper into ECF resources on this topic.

- Kick Starting (or boosting) an endowment fund  This may present future giving opportunities through special memorial gifts, Donor-Advised Funds (DAFs)  or gifts of stock or appreciated assets. During extraordinary times (such as a recession or the current COVID-19 crisis), it may be appropriate to hold a Special Appeal to meet a budget shortfall, but only after all normal good stewardship practices and realistic budgeting endeavors have been pursued. This might include consideration of potential programming cuts as part of the process until the income situation has improved. [For guidance on budget preparation, you might find ECF’s Finance Resource Guide helpful ]

Two Dangers of a Special Appeal for a Budget Shortfall

- First, while it may solve the current year's financial problem, unless some other change occurs in the church's income and giving patterns, the problem will still be there next year. Holding a Special Appeal this year for a budget shortfall is likely to mean that a more major program to boost annual giving will be needed next year.
- The church's greatest financial strength is the annual stewardship giving of its regular worshippers. This enables parishes to maintain cash flow and cover operating costs. A Special Appeal can interrupt regular income streams, particularly if it becomes a normal occurrence which would result in givers reducing annual giving to have something to contribute to a 'regular' Special Appeal.

Purpose of this Guide

If you feel it's right to proceed with a Special Appeal, you may find this step-by-step guide helpful. Situations differ from parish to parish, so make any needed changes to suit your particular circumstances.

Four P's for Leadership

There are four P's to ensure a Special Appeal is successful, namely:

- 1** Planning
- 2** Purpose
- 3** Prayer
- 4** Preparation



PLANNING

The first step is for leadership to determine that a Special Appeal is the appropriate course of action, having considered carefully the financial needs of the church and its strategy for annual giving **4** Once this is agreed, then the next stages are planning and preparation.

Begin by assembling a small planning group (or Appeal Leadership Team) to discuss the following questions:

- 1 Purpose (or Focus):** What is the specific financial need for the Appeal? Why should anyone support this?
- 2 Audience:** To whom are we directing the Appeal? The congregation, all associated with the church, or the wider community?
- 3 Timeline:** When is the Appeal going to begin and end? How does this fit with other activities in the church or community? Does this allow sufficient time for planning? **5**

- 4 Communication:** What information do we want to communicate? How are we going to ask for gifts? Should we create written materials (for direct mail or personal distribution), make a presentation, create a video or website page? What social media platforms should we use? *[Some low-cost resources can be found at 6]*
- 5 Method:** How are people going to give? Pledge cards? 7 Online? *[Some low-cost services can be found at 8]* Special Collections during worship services? Stock or other appreciated assets, Donor-Advised Funds (DAFs), Qualified Charitable Distributions (QCDs)?
- 6 Giving Thanks:** In addition to written acknowledgements, how are we going to thank donors? A special Thanksgiving service?
- 7 Connection with Strategic Vision:** How does this Special Appeal link with our mission and ministry? 9 What is expected to happen following the Special Appeal?

Item I under Planning is considered below, while tips on the other questions are given in Section 4.

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PURPOSE

The purpose for holding the Special Appeal must be clearly communicated and understood by potential donors. If they find it compelling they will support it generously. If it doesn't capture their imagination they will either scale back their contribution or not give at all.

Episcopal faith communities do a vast amount of amazing work throughout the country—and beyond—yet much of it is unseen and the financing of it little understood. A successful Special Appeal will require the parish to be able to communicate:

- Why the Appeal is being held
- What the money will be used for
- What difference will it make—in other words, what **impact** will it have—how will the church or wider community benefit.

The last point is vital. It is no longer enough simply to say that the church roof needs mending, our parish would like a youth worker or that we are facing a financial deficit. Appeal communication will need to emphasize the benefit arising from a successful appeal, particularly if it will be read by people who know little about the church.

Building a case for support will be critical to the success of the Appeal. This need only be brief, and it can be incorporated into the initial Appeal letter (or other communication materials or methods being used). It should answer the following questions:

- What is the need?
- How will the church's mission benefit from having this need addressed?
- What is the total cost involved?

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PRAYER

Prayer is the foundation of every successful appeal! This important step provides an opportunity to seek God’s guidance, not only committing the work to God, but also asking “Are we doing what God has called us to do, not only within our own parish but also within—and beyond—the wider community as well?”

It’s good to involve the wider church family in prayer, as well as members of the planning group (or Appeal Leadership Team). A special prayer **10** —and a special prayer time—perhaps before, during or after a Sunday (or other) service can provide church members the opportunity to carefully consider, and pray about, the financial needs of the parish and the reason why this extra support is being sought.

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PREPARATION

Audience: To whom are we directing the appeal?

The audience for the Special Appeal depends on the purpose for which the funds are being raised. The wider community might be willing to contribute to some projects (e.g., an organ refurbishment may be supported by those outside the membership who attend concerts) or building work (e.g., groups using the church kitchen may wish to contribute to its renovation). However, they are unlikely to contribute to a budget shortfall in regular income, and this type of appeal should normally be presented only to the church family.

Timeline: When is the Appeal going to be held?

For a Special Appeal it's important to announce it at least several weeks in advance. This indicates that leadership has given careful consideration before approaching the congregation and, in the case of an appeal for a budget shortfall, avoids creating any impression of panic. It also gives people time to prepare and think about what is being asked of them. The Appeal "launch" could tie in with another event, service or liturgical season, such as Evensong, Advent or Pentecost Sunday or you might identify a particular time when the Appeal could be the major focus.

Communication: Presenting your case

The success of any appeal depends upon the enthusiastic and informed way you present the opportunity to participate and the positive way you invite others to join you in giving.

- Let the church membership know who is leading the process and, using the prepared case for support, the purpose of the Appeal. This can be done through newsletter articles, church bulletins, announcements, the parish website, etc. Use every channel of communication that the parish has available, especially social media.
- Create a list of all to be approached/solicited (include all contact information (names, physical and email addresses, phone numbers)). Give particular consideration to those with financial potential to be ‘lead’ givers in the Appeal as well as “thought” leaders—those who are influential opinion-makers and motivators within the life of the community. Be sure to capture those people who reflect the diversity of the community with regard to gender, age, ethnicity, etc. A good tool to use is the Constituency Model which will help determine who is most closely linked to your congregation through both past/current involvement in ministries AND as an advocate for the congregation through leadership roles. Find the Constituency Model here: 

Given the current COVID-19 crisis and impact on in-person gatherings, presentations and house visits can be accommodated through Zoom or other video conferencing options to protect those at risk such as the elderly and unvaccinated population.

- Decide whether to hold a presentation and if so, when. The more significant the Appeal, the more important it is to hold a presentation or “launch” event.
- Draft an initial Appeal letter to those on your list. **12**
You might wish to write two different letters—one for those who already support the church regularly through annual giving (which acknowledges this and thanks them for it) and one for others. The letters should be personally addressed, although hand delivering them allows the opportunity for personal communication. This initial letter will either seek to:
 - Invite people to a presentation event when the Appeal will be presented in detail. This letter will be short, stress the reasons for the appeal and the benefits of achieving success. It should not include a response form.
 - Or **make the ‘Ask’** if there is no presentation event. This letter should include both the case for support and response mechanism, such as a pledge/giving card or response envelope.
- Invite people to prayerfully and thoughtfully consider their response.

- Provide a mechanism for the response.

(See the following Method.)

After a service, or during a fellowship hour, might be a good time to distribute the letters to those who attend church. For others it may mean a personal “house” visit or call. If it’s already been mentioned in the parish newsletter etc., it should not come as a complete surprise. It may mean that you have to ask some members of the church, other than just the planning group (or Appeal Leadership Team), to deliver the letters and have a conversation with those who missed the presentation or didn’t attend a service.

This may be personally challenging for some so perhaps some additional guidance is needed here. Remind people that they are not expected to be high-powered salespeople but rather members of the church interested in strengthening its ministry and mission. They should be informed, sincere, enthusiastic and convincing of their own support of the church. These personal encounters can also be an opportunity to get to know someone better and hear why they love their church. Listen to their stories and share some of your own. **13**

IRA Charitable Rollover:

If you are 70 ½ or older, you can make a contribution to your parish or Episcopal organization directly from your Traditional IRA simply by instructing the plan administrator to make the transfer directly. As of 2021, you are allowed to transfer up to \$100,000 a year to the charities of your choice as a Qualified Charitable Distribution (QCD). Your gift will be sent directly to your parish or Episcopal organization, will not be reported as taxable income and will count toward your minimum distribution requirements. And, most importantly, your generous support will help sustain your favorite parish or organization.

Method: How are people going to give?

There are numerous options to consider:

- Create a special pledge card  or envelope which enables the gift to be made in a convenient and confidential way.
- Establish an online giving mechanism or a donation button on your church website. Many churches are already set up for this and can create a separate link for a Special Appeal.
- Allow people to think more broadly in terms of gifts of stock or appreciated assets, as well as contributions from Qualified Charitable Distributions (QCDs) from Traditional IRAs and special grants from Donor-Advised Funds (DAFs).
- Special collections during worship services will allow people to submit their contribution, pledge card or special envelope.

As noted previously, Special Appeals can provide opportunities for ongoing or future giving. For example, an endowment created through a Special Appeal can be the recipient of special memorial gifts, or opportunities for gifts at special times in life (e.g., special gifts at retirement or other significant life events).

Some practical tips:

- Have extra pledge cards/envelopes available for those not on the distribution list
- Indicate on pledge cards/envelopes where they should be returned
- Make it clear how checks should be made payable
- Provide contact information for those interested in making contributions of appreciated securities, or through QCDs, DAFs, etc.

“All things come of thee, O Lord,
and of thine own have we given thee.”

—1 Chronicles 29:14

GIVING THANKS

The most important part of any appeal is the “thank you”—thanking donors for their gift and letting them know why their gift matters and that you are grateful for it. Incorporating an impact statement in the thank you is important in recognizing all the good that comes from the gift. For example, an appeal to support a feeding ministry might note in the thank you *“Your gift enabled us to provide lunch to 100 older and vulnerable people last month thereby creating a new network for them in the community and helping them overcome loneliness and feelings of isolation.”* The important aspect is that the ‘thank you’ is authentic and demonstrates the Special Appeal’s impact.

“Thank You’s” should be in the form of letters **15**, personally addressed, which include:

- The date and amount of the gift and form (i.e., check, online donation, stock or other asset, etc.)
- The purpose for which the gift will be used (i.e., the nature of the Special Appeal) and anticipated or realized impact (as noted above)
- The appropriate IRS acknowledgement language for single gifts of \$250 or more (although you may wish to adopt the practice for all gifts). Simply add “No goods or services have been exchanged for this gift. This gift is fully tax deductible to the extent permitted by law” at the end of the letter.

Please note, those recommending grants from DAFs and making QCDs from their Traditional IRAs should also receive “Thank You” letters. However, DAF grants and QCDs are NOT tax deductible values.

Holding a Thanksgiving Service also provides the opportunity to not only publicly thank and acknowledge donors, but to continue to praise and thank God for all that God has given to us, to offer the gifts that have been made, and pray for their use in the building up of God's kingdom.

Some ideas for doing this as part of a regular worship service may be:

- Incorporate an appropriate psalm in the early part of the service
- Insert suitable prayers among the intercessions
- Amend the introduction to the Offertory
- Bring up the gifts given as part of the Offertory

It's also important to announce the total amount pledged or raised.

What to do at the conclusion of the Special Appeal?

- The planning group (or Appeal Leadership Team) should hold a review meeting to evaluate how the Special Appeal went, and what, if any, next steps might be appropriate. Focus on what went well and what should be done differently for future Special Appeals. The key points from this review, together with a summary of the outcome, should be shared with leadership if not already involved.
- As the nature of Special Appeals is for specific projects, gifts are, accordingly, restricted and, therefore, must be recorded and tracked appropriately. Coordination between the planning group (or Appeal Leadership Team) and parish treasurer/finance office is essential.

Grateful thanks are expressed to Jonathan de Bernhardt Wood, Church of England's National Advisor for Giving and Income Generation, for permission to adapt the 2009 publication "How to Run a Special Appeal" by their National Stewardship Committee for use by Episcopal communities of faith.

Duration of Special Appeal will be based on timeline established but usually would be two to three months including planning and preparation

Sample Timeline for Special Appeals

I. PLAN

Assemble and Convene Planning Group or Appeal Leadership Team to discuss Purpose, Audience, Timeline, Communication, Giving methods and all necessary preparations

Create an Appeal Prayer and/or how to incorporate into worship

Purpose:

Why is the appeal being held?
What will the funds be used for?
What will be the impact or benefit to the church and/or community?

Audience:

Church family or beyond?

Timeline:

Determining beginning and end dates of Appeal

Communication:

Build case for support; create appeal letters or “launch” invitations; create list of those to be solicited

Concurrently with planning, prep and communication, determine and set up giving methods (i.e., pledge cards, online donations, appreciated assets, DAFs, QCDs etc.)

2. ANNOUNCE

Appeal announcement or launch event

3. COLLECT

Solicitation and collection period based on timeline

4. CELEBRATE

Celebrate and give thanks

Plan celebration service and announcement of funds raised; written acknowledgement of all gifts

5. FOLLOWUP

Post appeal work

Hold review meeting to evaluate; ensure that all gifts are recorded and tracked properly