Stewardship
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Benedictine Stewardship

Steven A. Peay

"They devoted themselves to the apostles' teaching and fellowship, to the breaking of bread and the prayers. . . All who believed were together and had all things in common; they would sell their possessions and goods and distribute the proceeds to all, as any had need. . . they broke bread at home and ate their food with glad and generous hearts, praising God and having the goodwill of all the people. And day by day the Lord added to their number those who were being saved." Acts 2:42-47 [1]

The Rule of Saint Benedict

The early Church did not act out of scarcity, but abundance – the abundance of the Lord's presence, and of one another. The essence of the monastic movement was an attempt to recover the spirit of the early Church. Thus, when Benedict talks about stewardship in the Rule, what he's looking to do is recreate what is described in those five verses of Acts 2. What we see there is a community that has worked out what its mutual relations are going to be. They have learned how they are going to be about the business of caring and being cared for.

We know little about Benedict himself, apart from his traditional dates of birth and death, 480-543, and that there is a section in THE DIALOGUES of Pope St. Gregory the Great devoted to Benedict's life and miracles. Benedict's most important contribution, his Rule, was composed sometime in the mid-sixth century, and is a relatively brief document, consisting of a prologue and 73 short chapters describing the nature, content, and duties of monastic life. It has served as the guidepost for western monasticism, and, indeed, as a foundation for the development of modern western civilization, which was influenced by Benedictine monasticism and its offshoots. The Rule, almost 75% scripture quotations, offers much to those who take the time to dialogue with it. Additionally, the Church of England, the spiritual ancestor of the Episcopal Church, was largely formed by Benedictine monasticism, particularly liturgically and spiritually. So, taking some time to consider stewardship from this point of view might bear fruit.

Prioritizing people

At the core of Benedict's understanding of stewardship is the care of persons. Whether it be the abbot (the head of the community) or the cellarer (the one in charge of the goods and services), the first order of business is how people are treated. This is an important lesson for us as we think about stewardship today. So often we think of it in terms of "time, talent, treasure,", which isall well and good, but what we really think about is – money. If we think first of the gift of the people in our care, remembering our accountability before God for them [2] (see the RB chapters on the abbot 2 and the cellarer 31) it can make a difference in how we go about planning, and accomplishing the real stewardship we have. Benedict makes special mention of the sick, children, guests, the aged and the poor on several occasions, as do the scriptures, and this should remind us just how much these people make Christ present to us. As we go about our stewardship each year, how are we serving those Jesus called "the least" of his family, toward whom he holds special care? Stewardship, Benedict-style, goes beyond the budget, and into the heart of how we approach all aspects of life together.

Listening from the heart

Further, perhaps we should extend that mutual care along to mutual obedience, another term dear to Benedict's heart. When he uses 'obedience' he's talking about listening to one another deeply, like we listen to God, with "the ear of the heart." It opens us to the community around us, which enables us to make a difference because we've really begun to listen to one another. Thus, Benedict's mutual obedience opens us to the "good zeal" leading us to love God and our neighbor in the way Paul talks about in Romans 12, and Benedict describes in chapter 72. Aquinata Bockmann, OSB, offers this insight in her Perspectives on the Rule of St. Benedict:

Pursuing what suits me (or what I consider useful), seeking fulfillment of my inauthentic needs, leads into a vicious circle. With each fulfillment, desires increase and new ones keep arising. Benedict points in the opposite direction. It is in extending ourselves toward others that we also achieve true self-actualization, a happy life (Prologue 15). When we strive only for ourselves, we go astray; when we aim at the true benefit of the others, we attain happiness for ourselves. Here Benedict shows a concrete way of making the other, and ultimately Christ, the center of our own life. "Father John the Dwarf said: 'A house is not built by beginning at the top and working down. You must begin with the foundations in order to reach the top.' They said to him, 'What does this saying mean?' He said, 'The foundation is our neighbor whom we must win, and that is the place to begin. For all the commandments of Christ depend on this one." [3]

When we lay the foundation of care of persons, then we can move to the care of time, places, and things – the other aspect of stewardship, but which often takes most of our attention.

Benedict charges the cellarer to care for the utensils of the monastery as though they were "the vessels of the altar," because nothing is negligible. Benedict takes very seriously God's word at the end of each act of creation, "and it was good." (Genesis 1:44ff). If God's creation is good, and God has entered our world – taking flesh in Jesus Christ – then created reality takes on a whole new purpose, and so should our care of it. Time, places, and things all become the tools for the building up of the community; they are means to the end of life together.

Benedictine stewardship is about mutual care, about the right use of time, places, and things, and finding the holy in the ordinary…including money. Our stewardship should be about seeing abundance, not mourning scarcity.

The Very Rev'd Steven A. Peay, PhD *is Research Professor of Homiletics at [Nashotah House Theological Seminary] in Nashotah, WI. History and historical perspectives have long fascinated Father Peay. His undergraduate study of Church History led him toward monastic life, which he entered at Saint Vincent Archabbey (Latrobe, PA) in 1977. Following his first profession of vows he studied for the priesthood and after final vows was ordained deacon in 1981 and priest in 1982. The studies he began in college and pursued in seminary continued following ordination. He returned to Saint Vincent to teach as Assistant Professor of Homiletics and Historical Theology. During his tenure at the seminary he was also engaged in parish work (including one year as a pastor), retreats for clergy, religious and laity, and served as the seminary's academic dean for five years. Leaving monastic life in 1994, he then devoted himself to parish work for the next fifteen years in Congregational churches in Wisconsin (Madison and Wauwatosa), while continuing to research, write and teach in various venues. Peay came to Nashotah House as adjunct professor of Church History in 2008 and was elected to the faculty in 2010. His orders were received in August 2010 and he is now a priest of the Episcopal Diocese of Albany.*

[1] Acts 2:42ff is recognized as the Scriptural basis for the Chicago-Lambeth Quadrilateral.

[2] See the Rule of Benedict chapters 2 and 31 on the abbot and the cellarer

[3] Aquinata Bockmann *Perspectives on the Rule of Saint Benedict: Expanding our Hearts in Christ* , Matilda Handl, OSB, and Marianne Burkhard, OSB, eds, Collegeville: Liturgical Press: 2005., p 64.

Resources

- Spirituality of Fundraising by Anne Ditzler, ECF Vital Practices Blog, May 25, 2011
- Spirituality of Fundraising by Henri Nouwen (Upper Room Books, 2011)

- [Jesus is the Reason for this Season Too] by Greg Syler, ECF Vital Practices Blog, September 10, 2014

- [God's Economy] by Jamie Coats, Vestry Papers, September 2014

- [Creating a Culture of Giving] by Angela Emerson, ECF Vital Practices Blog, January 27, 2012

10 Common Mistakes in Fundraising for Congregations

Erin Weber-Johnson

1.) Treat fundraising as a means to an end instead of a ministry

"Imagine the ministry we can do once we've received these funds!" exclaimed an excited fundraising volunteer a couple months ago. YES! I love dreaming of what is possible together and keeping a parish's collective eyes on a common goal. And yet, when we fixate on the goal alone, we are tempted to miss an important point: the process of fundraising is itself a powerful and life-giving ministry.

In the Jewish tradition there is a theology of charitable giving, *Tikkum Olam*, in which God gives us the ministry to repair or fix the world. In the Episcopal Church, through the baptismal covenant, we commit our lives to reconciling ourselves to God and to one another. ***When fundraising is ministry, lives are transformed in the giving of gifts to change and repair a broken world as we reconcile ourselves to God.***

How does this happen? It begins with the act of inviting others to give, requiring both the person inviting and the person receiving the invitation to explore their relationship with money. When considering a gift, one can mindfully ask how their own finances are impacting their health and wellness while asking how to respond to God's presence in their lives. This is an opportunity to invite others to draw closer to a life-changing God through their giving.

It is also an opportunity, in a time when values-based advocacy groups are seeing increases in their giving (see articles in The New York Times, Time Magazine, and NonProfit Quarterly to learn more), for people to make meaning of their lives and strengthen their individual sense of agency in the world. Humans are at our best when we are about the work of repair and reconciliation; we feel the craving for this work in the world deeply.

The Episcopal Church provides a powerful opportunity for people to do this very work: to invest their resources in God's Kingdom and to align their values with their giving.

2.) Treat church members as a monolithic body—without individual needs and diversity

This winter, my young son and I were at a doctor's office for our annual treating of strep throat. Have you ever had a strep culture performed? That's when they take a Qtip-like instrument and swab the absolute back of your mouth--almost always producing a gag reflex in patients. When the doctor approached my son with said Qtip, there was a lot of explaining and a magical narrative provided with voices to ensure my son wasn't scared. For me, there was a quick in and out of the Qtip of torture. I didn't feel slighted: there was no need to prolong the inevitable as my needs were different from my son's. My son needed time and patience. I needed the swab to be done quickly and without much fuss. The doctor knew we were different and adjusted his approach accordingly.

The same is done every day with ministry. A priest meeting with an individual for pastoral care will have a very different conversation if the person is age 15 or age 75. Or, if the person has a history that requires a sensitive approach. Or, if the person has special needs or requires another loved one in the room at the time. Gender, race, culture, and a previous history are a few variables to be factored into the interaction.

When fundraising is a ministry, the invitation to give becomes an opportunity for transformation. This means a one-size-fits all approach is ineffectual and can be pastorally inappropriate. This may mean moving beyond a singular letter or set of texts and seeking to adapt your congregation's approach to the various needs of those in the pews.

3.) Don't communicate; "It's their fault they aren't tracking"

Many a Stewardship Chair has wondered how many times the same message has to be communicated in various forms to be heard. The struggle is real!

The answer is simple. People won't give if they aren't aware that they are being invited. And in the end, everyone loses when an invitation isn't heard. In addition, if those in the pews do have diverse needs, then how messages are communicated becomes an important component of fundraising as ministry. Ask any counselor and you will hear that breakdowns in relationships are often characterized by, if not a result of, breakdown in communication.

Before your annual campaign begins, create a plan for what ways you will communicate with the congregation and how often. Facebook, Email, Newsletter, Bulletin Insert, Mission Moment, Adult Formation Meeting, Book Study, Texting----create a plan using your available tools. It may mean using multiple voices repeating the same message. Creating a plan ensures a greater likelihood of the message being heard.

4.) Lose the "Why", but instead focus on need

I once led a workshop where I asked participants "Why are you engaged in fundraising in your congregation?" and immediately I heard a response from a crusty rector: "to pay our bills, silly!" I followed up with another question, "So…how's that going?" Chuckles ensued and the rector was good naturedly chagrined. It highlighted for me an important lesson to be communicated: people will not develop a regular discipline of giving simply because an organization needs it.

Inviting people to give their gifts to God and to their faith community is always about the "Why". What are the core values of your congregation? What is God doing now in your community? How will their gifts be utilized to ensure the congregation's vision is made a reality? Why would volunteering for a stewardship committee be important? And, finally, why is giving to God a transformative act?

These are the fundamental questions to address why fundraising is of vital importance in your congregation. Begin with the "Why" each year as you determine your fundraising goals and evaluate your strategies for the annual campaign.

5.) Don't ask. We've done this every year. Folks should know to do this.

A congregation was in the midst of a clergy transition a few years ago and opted not to engage in an annual campaign with direct invitations for giving, but simply send out a letter with a pledge envelope. I was brought in the following year for a workshop with the vestry. A young member raised her hand to ask an important question: "What is a pledge?" A newcomer to both this congregation and organized religion, she was unaware of the practice or its impact on her life.

Nationally, over 70% of members in the Episcopal Church were not raised Episcopalian. This is exciting news as the Episcopal Church offers a faith tradition that is compelling and rich. It should not be assumed that newcomers know either how giving can be transformative or how funds contributed support the mission/ministry of the congregation.

Finally, a quick return to #2: People won't give, no matter how long they've attended, if they aren't aware that they are being invited. And in the end, everyone loses when an invitation isn't heard.

6.) Don't tell the truth. You may have had a bad year, but there is no need to admit it.

What to do when a previous year's fundraising effort didn't meet your congregation's goals? Be transparent: show how much was raised, how it was used, and communicate a plan for how things will be done differently in the following year. Fundraising is dependent upon healthy relationships which include admitting when things didn't go as planned.

Showing an ability to learn, grow and adapt is far more valued by potential donors than face-saving.

7.) Assume donors know you are grateful

How many times do you thank those who pledge to your parish? The best practice for non-profits in thanking donors is seven times per year. Rest assured: this does not mean seven thank -you cards!

An important theological component of Stewardship is the act of saying "thank you". We are entrusted with gifts and we respond with gratitude whether they come from God or from one another. Humans are wired for gratitude and saying thank you serves a number of purposes:

- It acknowledges a giver's generosity
- It can inform the giver of how their gift was used
- It can provide a vehicle for formation for folks in our faith communities

Here's what happened when St. John's Episcopal Church in Mt. Pleasant, Michigan adopted a discipline of gratitude:

- Members of the vestry meet with each of the ministry committees, bringing them pastries/cookies and a heartfelt word of thanks for their gifts to the parish.
- One member, who manages the local deli, was taken by this approach and now includes a "Round Robin thank you" in his weekly meeting with deli staff. Each week a staff member is invited to share a story of gratitude about their work.

- Another member is a social worker; she was surprised to receive a heartfelt thank you from her boss for her work. This was her first note of thanks in four years of service to her community.
- Gratitude is contagious. Originating at St. John's, its impact was felt in other sectors of the Mt. Pleasant Community.

The wise rector, when told of the news of this uprising of gratitude asked, "What if everyone in the world started to do this?" Indeed, what would it look like?

8. Bury the lead (See #4)

Every fall my mailbox is full of long, lengthy letters asking for a donation to various causes. I can always tell if the individual writing the letter is comfortable with the language of giving by the amount of text used to explain why they are inviting me to give. Whether it is a theological explanation, logistical overview of expenses, or an emotional narrative, the invitation of "Will you join me in giving to our organization/church?" can get quickly buried. Sometimes the invitation is left out altogether!

Theological explanation, logistical overview of finances, and a compelling narrative are all very important. However, people can miss the reason for your communication or grow frustrated in trying to decipher the meaning of the text.

One rector once bravely confessed, "I just get so nervous and would rather write about what I'm more comfortable with---theology, liturgy, and my dog!" Fundraising as ministry requires a commitment to healthy relationships. One key way to foster healthy relationships is to communicate intent and expectations in ways that can be both received and heard.

Don't bury the lead by hiding your invitation in the text. This is an important opportunity for members of your parish to hear and receive an invitation to give.

9. Assume a Capital Campaign will negatively impact your annual campaign

When thinking about fundraising, there may be the assumption that a capital campaign will negatively impact annual giving. Some believe a donor's willingness to give is capped at a fixed capacity and is immoveable. Anna Doherty, priest-in-charge, St. Aidan's, Hartford, Wisconsin describes the concern expressed by members of her congregation:

"Our parish can barely raise enough money to meet our operating expenses; how could we raise more for a capital campaign?"

Through a program of increased education about stewardship, and conversations centered around the congregation's mission and impact in the community, St. Aiden's capital campaign leadership team discovered that donors' willingness to give or to prioritize their giving increased. As the campaign progressed, Anna was pleased to report, "Folks at St. Aidan's were surprised--pleasantly so--to discover that capital campaign fundraising can actually increase annual stewardship giving!"

Here's a visualization exercise I do with people to help change their perception about fixed capacity:

I like pie. To help people overcome their perception that giving capacity is fixed, I invite them to picture a pie as representing donors' dollars. And then I ask them to visualize cutting the pie into slices to represent their budget. Now here's the twist: Once they have the picture of a pie in their mind, I invite them to visualize a bigger pie, rather than cutting the smaller pie differently.

10. Apologize for engaging in this holy work

"I'm sorry to have to ask you, but would you be willing to give to our congregation this year?"

A couple years ago I was training a group of volunteers on how to make an invitation in a one-on-one setting. One of the volunteers was recruited by the leadership of the parish not for her desire for the work, but because of her deep relationships in the community.

She gave me the evil eye for the entire training and when we moved to role playing she began with, ""I'm sorry to have to ask you, but would you be willing to give to our parish this year." I asked her to adopt the lens of ministry. When meeting with individuals, see this as an opportunity to pray with others, learn about their needs, and seek to connect them with Jesus.

Two weeks later she called me---her voice thick with emotion. "I never knew it could be like this." During her visits, she shared stories, cried with those in need of care, and prayed. She was surprised to be thanked consistently for her visits and for the invitation. In the end, the reluctant worker was transformed in her asking --- and by the ministry of fundraising.

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Previously, Erin was a grants officer at Trinity Wall Street in New York City, a consultant for the United Thank Offering (UTO), and she and her husband served as missionaries in Taiwan. Erin holds a master's degree in public administration from New York University and is a member of St. John the Evangelist Church in St. Paul, Minnesota.

Resources

- ECF's Top 10 Annual Giving Strategies an ECF webinar led by Erin Weber-Johnson, August 22, 2017
- Donations to A.C.L.U. and Other Organizations Surge After Trump's Order, The New York Times, January 30, 2017
- ACLU and Planned Parenthood See 'Unprecedented' Rise in Donations After Donald Trump's Election, Time Magazine, November 14, 2016
- How Far Does the Post-election Nonprofit Giving Surge Extend?, NonProfit Quarterly, April 17, 2017
- Generational Characteristics of Giving: What to do? by Erin Weber-Johnson, ECF Vital Practices Blog, October 8, 2013
- Year Round Stewardship: Talking About Money, an ECF webinar presented by Chris Harris, February 11, 2014
- Year Round Stewardship, an ECF webinar presented by Erin Weber-Johnson, February 11, 2015
- Volunteers: The Value of Why by Erin Weber-Johnson, ECF Vital Practices Blog, May 28, 2014
- "Why I Give" by Holly Stoeker, ECF Vital Practices' blog
- New FACTs on Episcopal Church Growth and Decline, a report by C. Kirk Hadaway, the Office of Research and Statistics of the Episcopal Church, 2015
- What if Everyone Practiced Gratitude Year Round? by Erin Weber-Johnson, ECF Vital Practices Blog, May 6, 2014
- A Culture of Generosity by Kim Hanson, ECF Vital Practices Blog, June 16, 2017
- Lessons from Fundraising Volunteers by Erin Weber-Johnson, Vestry Papers, September 2014

How Much is Your Congregation's Space Worth?

Jerry Keucher

Many congregations have spaces that are not needed for the liturgical, educational, and social life of the parish. It is perfectly all right to make such spaces available to outside groups, but in order to make a rational decision about how much to charge for the use of your space, it is necessary to have the answers to three questions:

1. What does similar space cost in your area? You need to do some real checking with local real estate agents.
2. What does it cost us to operate our space? The purpose of this piece is to give you a tool to come up with this answer, so we will return to this discussion.
3. What can the prospective user afford to pay, and is that amount sufficient to cover your costs?

Too often parishes think only of the third question and this may lead them to make space use arrangements on which they actually lose money.

The first thing to do is to check how much similar spaces are renting for in your area. Real estate prices are local and they fluctuate often. You need to find out what the current rates are in your locality.

This link will take you to a spreadsheet you can download and save that will help you find the answer to the second question above. You can add or delete lines and copy the formulas wherever you need to in order to reflect your situation.

The basic concepts are these:

- Measure every space in your facility.
- Enter the name of the space in Column A and square feet of every space in Column B.
- Enter the number of hours per week the space is used by the congregation in Column C.
- On a separate line enter the number of hours per week in Column C that each space is used by outside groups.
- In Column D enter the number of weeks per year each space is used by the congregation and by outside groups.

- There is a formula in Column E that will calculate how many square-foot-hours each space is used.
- In Columns H and I enter all the costs of maintaining and operating your plant, including the amount you are setting aside every year in your capital reserve. (If you aren't funding a capital reserve now, please start to do that. This is a separate, but very important, discussion that I would be happy to have with you. My email address is at the bottom of the article.)
- If you pay for services that are only for the outside users, enter those costs under the heading Direct Costs for Outside Users Paid by the Parish.
- There are formulas that add up the total square-foot-hours and divide that total into the total it costs you to operate your plant.
- This results in what it costs you to operate one square foot of your space for one hour.

Using the spreadsheet as described above will allow everyone to be satisfied that the congregation is not losing money when letting outside groups use your space.

Of course, this spreadsheet reflects only your current costs. If you are contemplating an arrangement that allows an outside group to use spaces that are normally not heated and cooled during the week, your utility costs will go up significantly. You will want to think about negotiating a way of having the user pay the excess utility costs.

It is one thing to allow 12-step groups and other users make use of spaces shared by the congregation. Such arrangements are called licensing agreements and rarely have any legal or canonical ramifications.

It is quite another thing to lease portions of your space to an outside group for their exclusive use. It is perfectly all right to do that, but, the lease may need the approval of the Bishop and Standing Committee of your Diocese. There may be property tax implications for a lease arrangement. You will not lose your tax-exempt status as a charity, but part of your property may need to be put back onto the property tax rolls. There is nothing wrong with that, but you need to write the lease so that the tenant has the responsibility of reimbursing you for any taxes that result being due.

When you know the answers to the first and second questions posed above, then you can have a reasonable discussion with prospective users of your space. If what they can pay is less than what it costs you to offer the space, you need to make a careful, prudent decision about whether it is in the parish's interest to subsidize their operation. There may be compelling reasons to do so, but you need to consider whether such a subsidy is an effective use of your resources.

I encourage you to read Chapter 5 of *Remember the Future: Financial Leadership and Asset Management for Congregations* for a fuller discussion. Please feel free to be in touch with me if you have questions.

If you have any questions, please contact me: jkeucher@episcopalfoundation.org or 347-713-2218.

***Jerry Keucher**, an Episcopal priest, is the author of Remember the Future: Financial Leadership and Asset Management for Congregations(Church Publishing, 2006) and Back from the Dead: The Book of Congregational Growth (Church Publishing, 2012). He serves as priest-in-charge at St. Mary's Episcopal Church in Brooklyn, New York, and works with ECF as a consultant. Jerry has served as chief of finance and operations for the Episcopal Diocese of New York. He has held similar positions in financial leadership, including Staten Island Botanical Garden and Staten Island Institute of Arts and Sciences. A gifted linguist he has taught Greek and Hebrew at Princeton Theological Seminary and Yale Divinity School.*

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Resources

- Calculating the cost of operating your space worksheet for congregations to decide how much to charge for space rental
- Partners for Sacred Places, a non-profit that helps congregations make the most of their facilities as civic assets
- Remember the Future: Financial Leadership and Asset Management for Congregations by Jerry Keucher (Church Publishing, 2006)
- A Ministry of Space by Louise Fortuna, Vestry Papers, July 2016
- Tenants and Friends by Anna Olson, ECF Vital Practices Blog, March 3, 2016
- Church Building Use by Annette Buchanan, ECF Vital Practices Blog, May 31, 2017

Rummage Ministry

Lu Stanton León

When Christ Church, Winnetka, gears up for one of its twice-yearly rummage sales, it's all hands on deck. It takes a coordinator and the help of 400-plus volunteers, but as a result of their work, the church raises more than $300,000 every year for local charities.

We're not talking trash here. This is a serious—but oh-so-fun—ministry.

"It's one of the biggest rummage sales in the country," says Charlotte McGee, who for 10 years has served as rummage sale coordinator for the parish which is just steps away from Lake Michigan in one of Chicago's North Shore suburbs.

Rummage as outreach

“Rummage is our biggest outreach, and it is just up my alley,” says McGee, who has given herself the title of Queen of Rummage and wears a tiara on sales days. She moved to Winnetka from Boston 23 years ago and was the volunteer head of the rummage sales’ boys department for 13 years before being hired as a part-time coordinator, the only paid position associated with the ministry. “I thought I’d work in the boys department so I could clothe my two boys,” McGee says. “My motto in life is never pay retail. Plus, I’m super green, and this keeps all these perfectly good items out of the landfill.”

With the first sale dating back to 1925, rummage sales are the oldest and largest mission outreach at Christ Church, which collects donations year-round. The sales—a smaller one on a Saturday in June and the larger one on a Thursday in October—attract more than 4,000 customers from the greater Chicago area, as well as nearby states and Canada.

Why a Thursday?

“When the rummage sale first started, Thursday was the maids’ day off,” McGee says. “When I first became coordinator we thought about switching it to a Saturday because people work full-time, but with the way that families operate, with kids signed up for 25 different things on weekends, we would not be able to staff it on a Saturday.”

Plus, McGee says, the busiest time at the sale is between 7 and 8 am, so people can come shop before they go to work.

The Saturday summer sale started about 30 years ago.

“The idea was to have a mini-sale to clear out storage space and move out the shorts and t-shirts and swimsuits. This year we made $64,000. That’s hardly a mini-sale, but it is compared to our fall sale.”

The fall rummage sale has 30 different departments that fill three buildings and five outdoor tents. Shoppers can find everything from clothes to furniture, stereos, jewelry and sterling silver. People often line up the night before to be first for early bargains.

The departments are run by 73 chairs who set prices and determine displays. About a third of the chairs and a third of the volunteers come from the community.

Making the most of space

Why are the rummage sales at Christ Church, Winnetka so big and successful? Lots of factors come into play—years of experience, organization, parish buy-in, ATM on-site—but the not-so-secret secret is storage space.

"We own another building across the parking lot, and we use most of the main floor and all of the basement for collecting and storing," McGee says. "We collect year round. Most places can only collect for two weeks. The only thing we store off-site is furniture. We rent a truck, I hire two guys and we pick up once a month. It goes right to a storage unit."

At sale time, she says, "Basically, things just stop for 10 days. There's an event, we call it flyover, which means we have all generations from the parish gather on a Saturday and things fly over the parking lot from the storage space to the parish house. It's a day when everybody in the parish participates."

5 Tips on running a successful rummage sale

1. **Don't accept everything that's donated.** "Even if it is a small rummage sale, you have to be savvy about what you accept," McGee says. "We've really learned what sells and what doesn't. We presort what we receive. About 40 percent goes to the dumpster or Salvation Army or Goodwill, or a cloth recycling place. I put as little in my dumpster as we can. But you have to

know what to take and what not to take."

Click here for a complete list of items Christ Church doesn't accept.

2. **Share information with other rummage sales.** Christ Church is a member of the North Shore Chicago Rummage consortium, a group of about 20 different churches that share information and produce a list of rummage sales in the area.

   McGee says there is no feeling of competition among the church rummage sales.

   What we found is that people who like rummage sales, like *all*rummage sales. Since being part of the consortium we've increased our customer base. They're savvy about online advertising, and you can advertise on their website for free."

3. **Reward your volunteers.** At Christ Church, if you work for 10 hours for the rummage sale you can attend a presale. Prices are 25 percent more, but you get first dibs on merchandise.

   "The presale agreement is a real enticement for volunteers," McGee says. "And my chairs get an hour and a half before qualified volunteers when it is just other chairs shopping. That's great incentive to be chairs. Furniture and the French room sections are the most popular."

4. **Don't expect to always have your best year ever. "**There are two factors you cannot control, and that's the weather and the quality of your donations. I start watching my weather app about two weeks before the sale because if it rains, it really affects the bottom line."

   That being said, McGee does believe "there's a separate god just for rummage because since I've been doing it, it has only rained once."

5. **Success is about more than money.** "My definition of a successful rummage sale is happy volunteers and happy customers, and both of them coming back next year. I don't want it to be only about making money. And we give away a lot of stuff during the year. Because we collect year-round we are able to give furniture and items to people in need."

For more information about Christ Church's rummage sales, go to http://christchurchwinnetka.org/serve/rummagebenevolence/shop/

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Resources

- List of Items Not Accepted for Donation at Christ Church, Winnetka, IL
- The Best Fit: Matching Volunteer Skill Sets to Needs by Richelle Thompson, ECF Vital Practices Blog, September 6, 2016
- Gifts: Thank You But???? by Erin Weber-Johnson, ECF Vital Practices Blog, December 29, 2014
- Simplify Scheduling and Sign-Ups a tool to help with volunteers, by Brendon Hunter, ECF Vital Practices Ttool
- Shared Calendar = Less Conflict by Ann Mellow, Vestry Papers, November 2015

Stewardship
October 2017

Transformative Stewardship Calendars

Chris Harris

For most of us, when we hear the word "stewardship," our minds instantly go to the annual pledge drive. In fact, in consulting with clergy and vestries around the country, I have often heard the terms used synonymously, as in, "We had such good *stewardship* these last couple of years, we were finally able to hire that youth leader." As a result, "stewardship" has become little more than a churchy word for (an often unpleasant) fundraising event in the fall. However, contrary to popular understanding, stewardship doesn't have its roots in church budget meetings but throughout scripture starting with Genesis and continuing in the many of the teachings of Jesus, most famously the Parable of the Talents

– from which it derives its name. At its heart, stewardship calls us to a lifetime of discernment around the following question: *How do we steward (put to good use) the gifts we've been given in all their many forms to do the work that God has given us to do?*

A stewardship calendar uses the rhythm of the liturgical seasons to mobilize, teach, and inspire your members to recognize and appreciate the many ways they have been gifted, and then to practice putting those gifts to work building the Kingdom of God. A stewardship calendar can not only help us reclaim stewardship as a vital part of our formation as Christian disciples, but it can inspire giving as a spiritual practice in ways that are both life giving and transformative.

While there is no single way to organize one, here are a few ideas for getting your imaginations started:

Advent - Faith & Finances/Simpler Living

When the rest of the country is in the midst of the holiday shopping frenzy kicked off by that highest of consumer holy days, "Black Friday," why not offer a series that explores our relationship with money and stuff, and how they might be a barrier to our relationship with God (think the Parable of the *Rich Young Ruler*)? Advent is an important time to counter-program the culture with exploring themes of simpler living, consumerism, debt and even budgeting. There are many excellent resources out there you can draw from and the resulting conversations can be powerful and healing. Because you will likely be done with your pledge drives by Advent, your congregation will be more open to honest, spiritual conversations about money since you are not also asking for it**.**

Epiphany – Christ's Light in the World/Outreach

Epiphanytide is a great time to focus on the *congregation's* use of its gifts – its people, its buildings, its budget – and to celebrate the difference you are making in your community and the world. My congregation tithed about 10% of its income last year to more than a dozen non-profits in the community, which in turn built some amazing relationships, changed the course of more than a few lives, and got the church into communities who had never heard of it before. Sharing stories of the impact your congregation has on its community builds tremendous enthusiasm and pride for the mission of your church and is crucial to motivating donors in your congregation, particularly younger generations, when the annual pledge drive comes around.

Lent – Life & Legacy/Planned Giving

What if you offered a Lenten soup supper after Ash Wednesday that downplayed classic planned giving tools like wills, trusts and Legacy Societies, and instead challenged parishioners to ask, “How do I want to be remembered?” That’s a powerful question and the answer can start to change the way we live today. One of the most powerful exercises I have seen is to ask parishioners to write their own eulogy and share it with the class, and then reflect on what we might start or stop, to make it a reality. Again, it’s about using the season to inspire conversations that lead to personal transformation.

Pentecost – Spiritual Gifts/Time & Talent

The season of Pentecost is a perfect time to balance the fall pledge campaign with a time and talent campaign. Consider mirroring your pledge campaign, including pledge cards and lay witnesses who share short testimonials about how giving their time and talent has helped them to grow in their faith. This is also a good time for ministry fairs or spiritual gift assessments to help show your congregation that contrary to popular belief, *everyone* is gifted in the economy of God and everyone has a unique and vital place in the Body of Christ. This has the added benefit of supporting your fall pledge campaign as your efforts to teach about giving financially as a spiritual practice will feel more authentic when you show you are just as serious about gifts of time and talent.

Easter – New Life/Health & Wellness

The Easter themes of dying to our old self and rising to new life are a great time to focus on whole body health and wellness. By this point most of our New Year's resolutions have been long forgotten so why not use this season to remind ourselves that the first gift we have been given is our bodies and that we are called to care for them so that we might care for others? By spring, the weather is good enough get outdoors and prayer walk the neighborhood around the church as both an evangelistic and healthy spiritual practice. Perhaps there is a fitness expert in the congregation who could offer classes that marry physical fitness, healthy eating and spiritual wellness.

Ordinary Time – Creation Care

If you missed Earth Day, the "green season" is a good time to focus on themes of creation care. Neighborhood clean-ups, electronic recycling day, nature hike Eucharists, and garden planting are just a few of the many ways that the congregation can use the long season of ordinary time to celebrate the God's gift of creation and recommit ourselves to its care. The possibilities are endless!

Fall – Giving as a Spiritual Practice/Pledge Campaign

By the time your fall campaign comes around, you will have effectively spent a good part of the year opening the eyes of your congregation to the many ways we have been blessed and have practiced giving those differing gifts away in ways that care for and build the Kingdom of God. By the time we get to the fall pledge campaign, you are now free to teach and preach about giving as a spiritual practice in a way that is more authentic and credible, because it has been integrated into a broader, year-round formation of what it means to be a disciple of Jesus. It's harder for people to dismiss our spiritual conversations around giving money as self-serving because it's what you have been doing in every other context all year.

Again, these are just a few ideas. There is no one way to do it. The point is to use your imagination, the rhythm of the church calendar and the cultural calendars, to draw your congregation into teachable moments of how God has gifted us, and how we are called to put those gifts to work transforming the world and ourselves in the process.

For more information, contact Rev. Chris Harris at charris@stbartschurch.org.

***Chis Harris** is Assistant Rector at St. Bartholomew's Episcopal Church in Poway, CA. Prior to that Chris served as Canon for Congregational Development at St. Paul's Episcopal Cathedral, where his responsibilities included evangelism, newcomer welcome, small group organization, ministry development, communications and stewardship. Chris continues that ministry at St. Bartholomew's where he joined the staff as Congregational Development Minister in September of 2015. Prior to ordination, Chris defended people from the IRS as a tax attorney. He has served as Chairman of the Alpha Project for the Homeless, a San Diego-based multi-service homeless outreach agency recognized nationally by the President of the United States as the country's 185th Point of Light. Chris currently serves on the Board of Directors of The Episcopal Network for Stewardship, the Steering Committee for Invite-Welcome-Connect, and is a facilitator for Gathering of Leaders, and is a national speaker on congregational development topics including evangelism and stewardship.*

Resources

- Year Round Stewardship: Talking About Money, an ECF webinar led by Chris Harris, February 11, 2014
- Annual Campaign Timeline, a tool to help congregations understand the need for year-round planning
- 3 Blogs on Stewardship: #1 Year 'Round Stewardship by Bob Leopold, ECF Vital Practices Blog, February 13, 2015

- Year Round Stewardship an ECF webinar led by Erin Weber-Johnson, February 11, 2015
- Lessons from an Annual Giving Campaign by David Posterer, Vestry Papers, September 2010
- Free Resources from TENS (The Episcopal Network for Stewardship)

Four Steps to Maintain and Increase Your Endowment

Jerry Keucher

Editor's Note: ECF's Endowment Management Solutions program covers the complete spectrum of endowment needs from starting an endowment fund and updating endowment policies, to investing prudently and spending wisely. For more information, click here.

If you are using income from your endowment and investments to support the operating budget of your church, there is a good chance you are taking more from them every year than is sustainable over the long term. There are two reasons generally that investments come to be overspent.

Ø First, if that investment income is used in support of the operating budget (not capital spending), it will depress individual giving. Members figure they do not have to give because someone else's money will pay for the level of church life they want, and so there is more pressure every year to overdraw the investments to supplement the budget. This does not mean the members are uncommitted or faithless; rather, it means the leadership is not using the long-term investments appropriately.

Ø Second, investments used in support of the operating budget begin to get overspent because of downturns in the market.

Say a congregation with $2 million invested in an appropriately diversified portfolio is using a prudent 4 percent spending policy or draw, or $80,000, and putting it into the operating budget, and, like most congregations, they are not funding a capital reserve fund.

The market declines for two years, and the portfolio loses 25 percent of its value. Now the investments are worth about $1.5 million. The 4 percent draw produces only $60,000. Rather than cut the budget, the vestry decides to continue to draw $80,000. Actually, they decide to draw $120,000 because of an unexpected building repair. Drawing out $80,000 from $2 million is a sustainable four percent. Taking $120,000 from $1.5 million is an unsustainable 8 percent.

The vestry promises themselves that the extra $40,000 is a one-time borrowing and that they will pay it back, but the next year they need to replace some expensive valves and piping in the boiler system. They continue to draw $80,000 into the operating budget, and they take out $30,000 for the heating system work.

That's it. The habit is fully formed. Every year thereafter there will be what appear to be compelling reasons to continue to take too much from the investments. Without a change in leadership that congregation will almost certainly continue to overdraw the investments until they are depleted. It is very difficult to stop overspending investments. Overspending will only reinforce, not reverse, the lack of vision that led to the decision to overspend in the first place.

Let's say you are that new leader who can make a change in this pattern. You must do several things simultaneously. First, you must begin to communicate how important it is for the future of the congregation to stop overspending. Second, you must be the voice that puts a constant brake on spending until existing revenue streams have been increased or new income streams found. Third, you must increase and find those sources of revenue. Here are four steps to help you achieve these goals.

1. When people are accustomed to overdrawing the investments, they stop thinking of the percentage they are taking out; they just take out what they think they need. **The first step to getting control of the situation is to *calculate the total you are taking out as a percentage of a three-year average*.** Total up everything you are taking out and figure it as a percentage of a three-year average. If you want to use some other average--a thirteen quarter average, or a 36-month average--you can; just calculate what you are taking out as a percentage of some trailing average.

It does not matter whether you are taking money out for operating or capital purposes. If you need money for capital purposes, don't invade the principal of the investments. Run a capital campaign instead. What was your emotional reaction just now when I suggested a capital campaign? If you felt a negative surge that felt like, "Oh, we can't do that," or "That sounds like a lot of work," you are right to identify it won't be easy and will need to do some work to be an effective leader in your congregation. If you felt some enthusiasm and something like shackles coming undone, you are the kind of leader who can help your congregation get its investment spending under control.

2. **Second**, ***start ratcheting down the percentage to get to a sustainable draw***. If what you are taking out now works out to 9 percent of the three-year average, then reduce your draw every year by 1 percent, or at least by one-half of one percent. For example, if the amount you are withdrawing this year comes to 9 percent, make next year's draw 8 or 8.5 percent. When you are making the budget for the next year, recalculate the trailing average and multiply it by 8 percent. That is all the income that is going to come from the investments for any purpose whatsoever. Make the budget work with that number. In the immediate term that may mean cutting spending while you work to develop other sources of revenue--increased individual giving, space use income, and fundraising events.

3. **This means that the third step is to get people to *think of the investment draw as one more limited income stream***. Every other source of revenue in your budget is limited in terms of what it can reasonably be expected to produce right now. You know you cannot just raise any one of the other sources of income you have to what it takes to balance your budget. You can't say, "Well, we'll just

budget $50,000 more in pledges next year." The investments will not protest, as would your members or your tenants, if you take far more from them than they can or want to pay. That discipline has to come from you. That is why it is so difficult.

There will be people who, for various reasons, simply will not understand why you are trying to get the draw down to a sustainable level. They will say, "Well, we ***need*** to fix the gutters," or "We ***need*** a full-time sexton." Right. The buildings need to be tended to, and the congregation needs an appropriate level of staffing. When people say this, it means their thinking is limited to the short-term; they can think of getting the money these things require only from the investments. The point is to get people to think about other places to get the money. Maybe you need a capital campaign for the building work. Maybe there's a way of producing additional revenue from the buildings that will pay for the staffing.

4. **So the fourth thing you need to do--and it is a very difficult indeed--is to *get people to think about where they would get the money the congregation needs if they didn't have the investments.*** Where would people get the money to fix the gutters or employ a full-time sexton if there were no endowment? This will lead you to look more closely at other possible sources of income.

There are no magic bullets here. This is a hard slog. The longer the congregation has been overspending the investments, the greater the resistance will be to getting control of the situation. Through all of the difficulties you will encounter in getting the investment draw to a sustainable level, you will have to remember that you are doing something that is tough in the short run but necessary for long-term health of the institution, and something for which your successors will be very grateful. And I hope that will be satisfaction enough. If you have any questions, please contact me: jkeucher@episcopalfoundation.org or 347-713-2218.

Jerry Keucher, *an Episcopal priest, is the author of Remember the Future: Financial Leadership and Asset Management for Congregations(2006) and Back from the Dead: The Book of Congregational Growth(2012). He serves as priest-in-charge at St. Mary's Episcopal Church in Brooklyn, New York, and*

works with ECF as a consultant. Jerry has served as chief of finance and operations for the Episcopal Diocese of New York. He has held similar positions in financial leadership, including Staten Island Botanical Garden and Staten Island Institute of Arts and Sciences. A gifted linguist he has taught Greek and Hebrew at Princeton Theological Seminary and Yale Divinity School.
The Episcopal Church Foundation (ECF) has received a three-year grant as part of Lilly Endowment's National Initiative to Address the Economic Challenges Facing Pastoral Leaders. ECF's grant entitled "From Economic Challenges to Transformational Opportunities" will provide lay and clergy leaders of the Episcopal Church with resources, tools and other support to help address the financial and leadership challenges of congregational ministry in the 21st century.

This article was made possible by the Lilly Endowment grant. For more information on ECF's Lilly Endowment Initiative go to www.episcopalfoundation.org.

Resources

- ECF webinars on endowments by Ken Quigley:
  Basics of Endowments, October 29, 2015
  Are You Overspending Your Endowment?, July 20, 2016
  Spending Rules for Endowments, April 9, 2014
  Why Endowment Struture Matters, January 29, 2015
- Administering Charitable Endowments by David Leibell, Vestry Papers, March 2009
- Audits: A necessity, not an option by Tom Patterson, Vestry Papers, July 2009
- Dealing with Risk and Falling Markets... by Jerry Keucher, Vestry Papers, March 2009

Seven Ways to Steward Leaders' Time

Miguel Escobar

Congregations run because a core group of a congregation's membership – frequently estimated to be about 20% - makes the significant gifts of time, talent, and treasure that allow an entire community of faith to move forward. And while we frequently discuss what it means to be good stewards of contributors' treasure and talent, it's rare to hear discussions about being effective stewards of that core group of leaders' time.

Unfortunately, when I speak to current and former vestry members, and other congregational leaders, the issue of time – especially of time spent in poorly managed meetings – is brought up again and again as one of the most difficult aspects of serving on the vestry or other key committees in a congregation. In the spirit of honoring our core leaders' gifts of time, here are seven (okay, eight) ways we can all be better stewards of this important gift.

1. **Make time for meaning:** Lest we forget, the main reasons that our congregational leaders make gifts of time, talent, and treasure is that this is faithful, meaningful work. Therefore, it is essential to build in time for faith formation, meaning-making, and check-ins. ECF suggests starting regular meetings with 15-30 minutes of check in and Bible Study. Scott Gunn, Executive Director of Forward Movement, has suggested that vestries study the Book of Acts as the story of the early church resonates with many of today's challenges. Click here to read more about how one Episcopal vestry used regular Bible studies to move from being a regulatory body to becoming, in the Rev. Blair Pogue's words, a spiritual discernment team.

2. **Establish clear norms for start and end times:** It is also important to set a clear framework for how meetings will take place. Create (or review and amend) a vestry covenant at the beginning of each year, and have at least one of the norms explicitly address meeting times. An example norm might read "As a

vestry, we are committed to starting our meetings on time and ending on time, and our meetings will run no longer than two hours." Some vestries have used the techniques below (see, especially #6, the consent agenda method) to achieve meetings that are slightly less than an hour and a half. Click here to see additional examples of vestry covenants.

3. **Employ the 1:1 rule for meeting preparation:** We are not good stewards of one another's time when we fail to prepare for meetings, and this is true of both the meeting facilitators as well as participants. For meeting facilitators, a handy tip I've picked up is to employ the 1:1 rule, which states that for important meetings (such as vestry meetings), the meeting facilitator needs to do at least one hour of preparation for every hour spent in the meeting. So if the norm at your congregation is two hour vestry meetings, meeting facilitators need to spend at least two hours preparing the agenda, making sure everyone has the materials they need, etc.

4. **Foster trust and transparency about meeting participation:** One common mistake meeting facilitators make is that they assume collaboration requires everyone has to be at every meeting. Collaborative leadership experts, such as those at Interaction Institutes, disagree. Rather, becoming a collaborative leader means developing trust and transparency around who needs to be part of discussions. To do this, we need to create forthright cultures where we can discuss why certain individuals need to be at a meeting, why others do not, and also one where it is okay to ask why you need to be part of an upcoming discussion. In discussing this openly, people will give input on who needs to be at the table, and you will have made sure that the time spent (or saved, as the case may be) is truly worth their while.

5. **Use phone and video conferencing technology if/when possible:** Time spent commuting back and forth is a real factor in people's ability and willingness to participate in community leadership over the long haul. To the extent that it is possible (and I recognize that it may not be possible in all places), incorporate phone and video conferencing technology periodically so as to reduce the commute time for members who live quite far from the congregation. I've especially become a fan of Zoom, which has

free and low-cost options available, because I've found that it is easier to use than other conferencing technologies and has options for people to both dial in using their phones and video in for those who have their own laptops or computers.

6. Use the consent agenda method: The consent agenda method is one whereby regular committee reports are sent and read in advance by vestry members, and are approved (or not) as a single item on the meeting agenda. In the instances in which a vestry member reads a report and has a question or would like to discuss a point, they can write the meeting facilitator to move a report into the discussion items of the agenda. For more information on this time-saving meeting technique, I suggest reading the Rev. Ronald Byrd's article on how he incorporated consent agendas into his vestry meetings, and also Bob Shorr's article and tool of what consent agendas are and how they work.

7. Spend the bulk of time on strategic discussions: Congregations face many strategic challenges. How can our congregation become a source of hope for the wider community? How can its membership begin to look more like the surrounding neighborhood? How can our congregation become financially sustainable? My hope is that by employing some of the techniques above, you will have carved out more time for leaders to offer their insights on these weightier matters that lie at the heart of your community of faith.

Finally, it is important to give thanks for people's gift of time. The United Way has a famous fundraising maxim about the importance of thanking people seven times for their financial gift. I think this can be extended to gifts of time as well. This doesn't mean sending seven thank you cards over the course of a single year; rather, it's an impetus to find ways to thank key leaders for their contribution of time in small and large ways. A thank you card is a good start, as is a small recognition ceremony at the annual meeting to honor service of new and returning vestry members. Other times it may be as small as adding 'thank you' as an agenda item during a regular meeting, or perhaps an annual one-on-one coffee with vestry leaders in which the sole purpose is to say 'thanks.' When combined with the other seven techniques, we will be fostering communities of faith that are effective stewards and grateful for the contributions of leaders’ time.

Miguel Escobar *is Managing Program Director for Leadership, Communications and External Affairs at the* *Episcopal Church Foundation* *(ECF).Miguel coordinates the fundraising, communications and marketing efforts of ECF, as well as the team responsible for the online publication ECF Vital Practices, the Fellowship Partners Program, the Vestry Resource Guide, ECF's educational events, and a new initiative focused on forming strong leadership teams called Vital Teams.*

From 2007 to 2010, Miguel served as Communications Assistant to the Most Rev. Katharine Jefferts Schori, Presiding Bishop of the Episcopal Church. Miguel serves on the board of directors of Forward Movement and serves on the advisory councils of Duke Divinity School's Leadership programs and the Office of Latino Ministries. Miguel graduated in 2007 with a Master of Divinity from Union Theological Seminary in New York.

Resources

- Time Stewardship at a New Level by Steve Huffman, Vestry Papers, June 2001
- The Consent Agenda: More Efficient Meetings by Bob Schorr, Vestry Papers, January 2014
- Consent Agendas tool with a list of suggested items acceptable for a consent agenda
- The Consent Calendar by Ron Byrd, Vestry Papers, January 2016
- Vestry Covenants: A Great Start to 2017 an ECF webinar led by Miguel Escobar and Brendon Hunter, January 24, 2017
- Vestry Covenants and Norms, includes examples from various Episcopal congregations
- Vestry Meditations by Colleen McMahon, Vestry Papers, January 2017

- Meditations for Vestry Members by Colleen McMahon (Morehouse Publishing, 1999)

An "Endow your Pledge" Campaign

Deborah Kelly

Endowing one's pledge is the ideal way for some church members to support their beloved institution long after their passing. Creating an endowed pledge requires a parishioner to include adequate funds, explicitly designated for the church, in the member's estate plans. The words "adequate funds" are defined as funds that would annually – in perpetuity – produce interest equivalent to their annual pledge. If, for example, a member's annual pledge was $2,500, it would require a $50,000 gift in that person's estate plans be directed to their church. Churches typically take a 4-5% annual payout from their endowment. (Note: If you embark on this campaign, I recommend using a chart in your communications. It would contain several examples and state: "If your pledge is $X then $Y would be required to endow your pledge.)

Because most people designate these funds to be paid upon their death, "endowing one's pledge" should not be confused with the annual campaign where one pledges to give X dollars each year to support their church's operating budget. Most churches depend heavily on the annual campaign to support each year's mission and ministry. Estate gifts are typically placed in the church endowment and, while use of the endowment interest varies from church to church, most often these funds are spent on building maintenance. Many churches, including Calvary Pittsburgh where I serve, permit parishioners to specifically designate or restrict the use of their estate gift for purposes such as music, outreach, stained glass windows, or building maintenance.

Although the funds to endow one's pledge are typically transferred to the church endowment upon a person's death, occasionally members opt to give this gift during their lifetime. A major reason for this is that after age 70.5, when people are required to take a payout from their retirement funds, there are substantial tax benefits to giving some or all of the payout to a nonprofit.

If your parish is discussing a possible “Endow Your Pledge” campaign, please know that it’s not difficult. However, this campaign may not be as successful if it lacks context and a message that has been repeated frequently and resonates with your parishioners. Therefore, before embarking on this campaign, I highly recommend that you create a formal legacy society structure to acclimate your members with discussions about estate planning, opportunities for creating a legacy, and sustaining your church into the future.

Think of this campaign as one more tool in the planned giving toolbox. After your congregation is accustomed to hearing requests to remember the church in their will, the next biggest issue standing between you and a successful campaign is an effective marketing/communications plan. Your parishioners will need to understand the following salient points:

- What does endowing one’s pledge actually mean?
- How much money is needed to endow a pledge?
- How is this campaign different from the annual pledge campaign?
- Why is this campaign important?
- How will these gifts be used?
- Plus, additional information germane to your particular church should be explained.

After two active years of discussing our legacy society at several neighborhood cocktail parties/luncheons, articles in our newsletter and church bulletin, adult education programs, and more, Calvary Church launched an “Endow Your Pledge” campaign, accompanied by detailed information. Our marketing/communications included:

- In March 2016, every household received our legacy society brochure and letter announcing this campaign.
- Two weeks following our mailing, St. Michael's Society (our legacy society) members spoke about this campaign to our congregation at each Sunday Eucharist.
- In April 2016, our campaign announcement letter was printed in our newsletter and the May newsletter contained an article explaining the different between our "Endow Your Pledge" campaign and our annual pledge campaign.
- In June 2016, a church member hosted a cocktail party, open to anyone who wanted to learn more about this campaign. Our August newsletter asked members to "Please Remember Calvary Church in Your Estate Plans."
- An article in our October 2016 newsletter reminded parishioners that the active phase of this campaign would end December 31, 2016 and again explained why it was so important. Our November and December 2016 newsletters stated in large red letters: "Please Remember Calvary Church in Your Estate Plans."
- In April 2017, every household received a campaign summary letter, describing the successful outcome and our newly updated legacy society brochure. This update stated that endowing one's pledge was now a permanent, planned giving opportunity.

When we started the campaign many of the "usual suspects" were already members of our legacy society, so our goal was to add parishioners who have long been deeply involved in our church. The exciting news is that in addition to several members endowing their pledge, one family made a gift directly to the church's endowment; three previously anonymous donors presented paperwork; and a member who left the state, pledged an estate gift. As of August 2017, our legacy society is 61 members strong - including those who have endowed their pledge - in a church with 350 pledge units. This society had only 41 members in early 2014 and four of these members have since died.

Our goal is to have 10%, or 35 pledge units, endow their pledge. However, I want to stress that, in all communications, we stated that we understand not everyone is able to endow their pledge and estate gifts of any size are greatly appreciated and will have a positive impact on Calvary's future.

If you have any questions, please email me at dc1kelly@gmail.com

Deborah Kelly is the Planned Giving Chair at Calvary Church in Pittsburgh, PA.

Resources

- ECF Planned Giving services and resources
- Funding Future Ministry, a guide to planned giving
- Closing the Planning Gap by David Farrand, Vestry Papers, January 2011
- Basics of Planned Giving, an ECF webinar led by Jim Murphy, March 23, 2015
- Integrating Annual, Capital & Planned Giving, an ECF webinar led by Terri Mathes, October 1, 2014
- Starting Planned Giving From Scratch, a tool to help your congregation start from the ground up
- Creating a Legacy Society, a sample brochue and enrollment form for a legacy soceity
- How to Plan a "Final Affairs" Fair, a tool to help their members learn more about planned giving

Christian Stewardship

Sandra T. Montes

This article is also available in Spanish here. Este artículo está disponible en español aquí.

Stewardship: a complex word and a difficult concept. Many people prefer not to talk about it, but sometimes it is because they fail to understand what it really is. Stewardship is the management of what God has given us. We usually refer to it as the 3 "T"s: *Talent*, *Treasure*and *Time*. But there's a fourth, *Terra* (the creation). Sometimes we forget that we are sons and daughters of God. God has blessed us, blesses us, and will continue to bless us abundantly. Let us think about how God blesses us daily: with time, physical and mental health, energy, talents, possessions, friends, money, food, home, family…we could continue on and on, am I right? This approach is to be thankful for all the blessings we have. Even our very life is a gift from God. Stewardship is a practice of thankfulness and generosity, and it reflects our walk with God. Our goal is for our faith to grow and to be able to give generously. This goal is a ministry in itself, which we practice while trying to live a life filled with awareness and gratitude.

Being a good steward

God gave each of us talents to use while we are in this world. How do we use our talents to glorify God? One way is to use our individual talents to the best of our ability. As good stewards, we must practice our talents, improve them, and use them as often as we can to share God's love with all who need it. We have 24 hours in a day and it is up to us to decide how we will use that time. In the past few months there have been several natural disasters, such as hurricanes and earthquakes. Perhaps we can dedicate our time to assist those in need. We can also use our time praying for the needy, the sick, and the suffering. How can we be good stewards of our planet? An easy way is to start turning off the lights when we don´t need them and avoid wasting water. Let us try recycle as much as possible.

A way to express our Christian values is making stewardship a priority in our lives. We can remember this by asking ourselves the following question: “In what way will everything in my life show that I am a Christian?” If we constantly ask ourselves that one question we will see a change in the way we think, act, speak, listen, and give. Everything we do is for the glory of God, even the way we spend our money. The first thing we have to remember every day is that everything belongs to God. Psalm 24:1 says, “The Earth is the Lord´s, and the fullness thereof; the world, and all those that dwell therein.” In other words, everything belongs to God, everything comes from God and what we do with what God entrusted us is very important.

To become aware of our values we can make an inventory of where we spend our money. Matthew 6:21 says, “For where your treasure is, there will also be your heart.” We can make this inventory of our expenses by simply writing down what we spend our money on over the course of one month. We can divide our expenses into categories; clothing, household needs, cleaning supplies, toiletries, donations, church, travel, food, entertainment, etc. We can then further refine those categories; food (supermarket) and food (restaurants.) That will enable us to see at a glance where our values, treasure, and heart really are.

Faithful stewards of His Gifts

As good stewards we have the responsibility of managing something that doesn´t belong to us (because everything belongs to God). It is a privilege that God gave us and we must manage it with great care. When we talk about stewardship in the Church sometimes we make the mistake of thinking that we are collecting funds, but in fact it is something very different. The Very Rev. Miguelina Howell explains, “Stewardship is a spiritual practice of thanksgiving that helps us get close to God. Collecting funds is a specific activity to collect financial resources for a specific purpose.” This spiritual practice helps us grow as people of faith, while collecting funds help us attain a goal or an objective.

To live a full life, let us practice the stewardship of the four "T"s on a daily basis. Let us think about how we can glorify the name of God through our *Talent*, *Treasure*, *Time* and treatment of the *Terra*. These spiritual practices will bring us closer to God and can continue to make a positive impact even after the end of our physical lives. A way to be a good steward of what God gives us is to make plans for the end of our lives in this world. The Spanish-language ECF booklet on planning for the end of life titled "Faithful Stewards of His Gifts" can help you decide how you wish your worldly assets to be distributed, to give you peace of mind and relieve your loved ones from the burden of having to make those decisions on your behalf. The plans for your estate and the end of your life should reflect your values. This booklet will also help you learn how you can leave a legacy gift to your church.

ECF will be making this booklet available for free to anyone who would like one. To receive this booklet, register and participate in the upcoming Spanish webinar "Un Cafecito con Sandra Montes".

***Sandra Montes** was born in Perú, grew up in Guatemala and settled in Texas as soon as she could. Her passions are God, family (especially her son), music, education, and writing and she has been hoping and praying for this position for years.*

Sandra has been developing original bilingual resources for her church, school, and others for years. Sandra has been volunteering and working in the Episcopal Church since she was welcomed in 1986. She serves as musician, translator, speaker, consultant, and writer. She earned her doctorate in education in 2016 and is a full-time freelance consultant and musician.

Resources

- Un cafecito con Sandra Montes, an ECF Spanish language webinar with Sandra Montes, November 7, 2017
- Year Round Stewardship: Talking About Money, an ECF webinar led by Chris Harris,February, 11, 2014

- Spirituality of Fundraising by Anne Ditzler, ECF Vital Practices Blog, May 25, 2011

- Wholehearted Stewardship by Erin Weber-Johnson, Vestry Papers, September 2013

La mayordomía Cristiana

Sandra T. Montes

This article is also available in English here. Este artículo está disponible en ingles aquí.

La mayordomía: Una palabra compleja y un concepto difícil. Muchas personas prefieren no hablar del tema, pero a veces es porque no entendemos realmente lo que es. La mayordomía es la administración de lo que Dios nos ha dado. Casi siempre nos referimos a las 3 T: Talento, Tesoro, y Tiempo. Pero también tenemos una cuarta T: la Tierra (la creación) como parte de nuestra mayordomía. A veces olvidamos que somos hijos e hijas de Dios. Dios nos ha bendecido, nos bendice y nos seguirá bendiciendo abundantemente. Pensemos en cómo nos bendice Dios a diario: con tiempo, salud física y mental, energía, talentos, posesiones, relaciones, dinero, comida, hogar, familia… podríamos seguir y seguir, ¿verdad? Esta manera de pensar es ser agradecidos/as por todas las bendiciones que tenemos. Hasta nuestra propia vida es un don de Dios. La mayordomía es una práctica de agradecimiento y generosidad y refleja nuestro caminar con Dios. Nuestra meta debe ser crecer a diario en la fe para poder dar generosamente. Esta meta es un ministerio en sí mientras tratamos de vivir una vida consciente y llena de agradecimiento.

Siendo un buen/a mayordomo/a

Dios nos dio a cada uno/a de nosotros talentos para poder utilizarlos mientras que estamos en el mundo. ¿Cómo usamos nuestros talentos para glorificar a Dios? Una manera es usar esos talentos lo mejor que podamos. Como bueno/as mayordomo/as debemos practicar nuestros talentos, mejorarlos y usarlos cuantas veces podamos para mostrar el amor de Dios a todos/as los/as que lo necesiten.

Todos/as tenemos 24 horas diarias y tenemos el poder de decidir cómo vamos a usar ese tiempo. En estos meses han ocurrido varios desastres naturales, como huracanes y terremotos. Tal vez podríamos usar nuestro tiempo para ayudar los/as afectados/as. También podemos usar nuestro tiempo orando por todos los necesitados, enfermos o atribulados. ¿Cómo podemos ser bueno/as mayordomo/as de la Tierra? Una manera fácil que podemos comenzar hoy es apagando la luz cada vez que no la necesitemos y no malgastar agua. Procuremos reciclar siempre que podamos.

Una manera de expresar nuestros valores cristianos es haciendo que la mayordomía sea una prioridad en nuestras vidas. Podemos recordar esto haciéndonos la siguiente pregunta: “¿Cómo puede mi vida entera mostrar que soy una/un cristiano?”. Si nos hacemos esta pregunta constantemente veremos un cambio en nuestra manera de pensar, actuar, hablar, escuchar y dar. Todo lo que hacemos es para la gloria a Dios, incluso en nuestro modo de gastar. Lo primero que tenemos que recordar a diario es que todo le pertenece a Dios. El Salmo 24:1 dice, “Del Señor es el mundo entero, con todo lo que en él hay, con todo lo que en él vive.” En otras palabras, todo es de Dios, todo lo que tenemos viene de Dios, y lo que hacemos con lo que Dios nos encomendó (o prestó) es muy importante.

Para conocer nuestros valores podemos hacer un inventario de dónde ponemos nuestro dinero. Mateo 6:21 dice “Pues donde esté tu tesoro, allí estará también tu corazón.” Este inventario de nuestros gastos lo podemos hacer fácilmente escribiendo en qué hemos gastado nuestro dinero en un mes. Podemos dividir nuestros gastos en categorías: ropa, gastos de la casa, limpieza, higiene, donaciones, Iglesia, viajes, comida, entretenimiento, etc. Y podemos separar estas categorías todavía más: comida (supermercado) y comida (restaurantes). Hacerlo nos permitirá ver fácilmente dónde están realmente nuestros valores, tesoro y corazón.

Fieles mayordomo/as de Sus dones

Como bueno/as mayordomo/as, tenemos la responsabilidad de administrar algo que no nos pertenece (porque todo es de Dios). Es un privilegio que nos ha dado Dios y debemos hacerlo cuidadosamente.

Cuando hablamos de la mayordomía en la Iglesia a veces nos equivocamos y pensamos que estamos recaudando fondos, pero eso es muy diferente. La Muy Rvda. Miguelina Howell explica que, “La mayordomía es una práctica espiritual de acción de gracias que nos ayuda a acercarnos a Dios. La recaudación de fondos es una actividad específica para recolectar recursos financieros para un objetivo en particular”. Esta práctica espiritual nos ayuda a crecer como personas de fe mientras que la recaudación de fondos ayuda a alcanzar una meta o un objetivo.

Para vivir una vida plena, hagamos la mayordomía de las cuatro T a diario. Pensemos cómo podemos glorificar el nombre de Dios a través de nuestro Talento, Tesoro, Tiempo y el tratamiento de la Tierra. Estas prácticas espirituales que nos acercan a Dios pueden seguir teniendo un impacto positivo aun cuando nuestra vida física termina. Una manera de ser un/a bueno/a administrador/a de todo lo que Dios nos da es planificando para el final de la vida en este mundo. El folleto de ECF sobre la planificación para el final de la vida llamado “Fieles mayordomos de sus dones” te puede ayudar a decidir cómo deseas que se distribuyan tus bienes terrenales para darte tranquilidad y aliviar a tus seres queridos de la carga de tomar esas decisiones. Los planes para tu herencia y el final de tu vida deben reflejar tus valores. Este folleto también te ayudará a saber cómo puedes dejar un legado a tu iglesia.

ECF le mandará este folleto gratis a quien desea uno. Para recibir este folleto, puede registrarse para participar en el webinario “Un Cafecito con Sandra Montes”.

Recursos

- Un cafecito con Sandra Montes un webinario por Sandra Montes entrevistará al Reverendo Alfredo Feregrino de Nuestra Señora de Guadalupe en Seattle, Washington
- Conversaciones sobre la mayordomía por Sandra Montes y sus invitados
- La Mayordomía en Un Minuto por Sandra T. Montes, Vestry Papers, 2016 marzo