THE EPISCOPAL NETWORK FOR STEWARDSHIP

Mid-Year Stewardship Review: Budget & Mission

Best Practices

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Learning Objectives

- Why a mid-year review is important
- Reporting on Money
  - Reviewing the numbers – Budget Actuals
  - Reflecting on the results – Pledge Actuals
  - Planning for the Summer Slump
- Reporting on Mission
  - A short review of mission and ministries
- Reporting on Membership
  - Volunteers
  - New Members

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Gratitude: The beginning and the ending

- All our stewardship is about gratitude
  - Our giving
  - Our volunteering
  - Our risk-taking
  - Our leadership
  - Our quiet calmness
  - Our accepting of gifts
- Start your mid-year review with a practice of gratitude

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Gratitude Practice

Why do a Mid-Year Review?

- Stewardship Formation
  - There are many reasons to hold a review, but ultimately **this is about forming our congregations theologically** on the topics of generosity and gratitude
- Other benefits
  - Update and **engagement** on ministry priorities, call for volunteers or help
  - **Transparency and accountability** in financial practices, year-to-date budget
  - A temperature check on how **connected** members are to the mission
  - Reminder to **keep pledges up to date** during the summer

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Reporting: The Money

Numbers are an indicator of what is happening … but they don't tell the whole story

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Evaluating your campaign performance

Reporting: The Money

What do numbers teach us?

1. They are a practical measure of our expected revenue
2. They are a small window into the capacity and generosity of our members
3. They are part of a measure into the impact or adoption of our mission

Evaluating your campaign performance

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Reporting: The Money

A few more notes about numbers:

It's not enough just to report them; **but rather to analyze them**.

- What are the **trends of giving**? Look at giving over time – three years at least.
- Analyze individuals over time.
  - Are their gifts staying the same year to year?
  - Individual giving should trend up year to year
  - Are there unexplained plateaus? Increases? Decreases? **These are opportunities for pastoral conversations**

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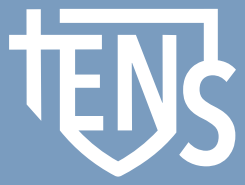
Reporting: The Money

Reporting on the Budget:

- Make it interesting: **impact** is more pertinent than line-items
- Remark on notable changes in practice or expectation
- If there is a ministry that is experiencing trouble, report on it, and **address solutions**
  - Staffing changes
  - Program expenses
  - Volunteer recruitment

Evaluating your campaign performance



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Reporting: The Money

Mid-year Cashflow:

- Many congregations experience a "summer slump" in cash when members take long summer vacations
  - Know who these donors are, and ask them to make a **pre-payment** of their summertime pledges
  - **Advocate for online giving**, which can be done from anywhere
  - Advocate for EFT, **recurring donations**, automated bill-pay services, or other banking options that keep cashflow steady

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Reporting: The Mission

Program is the heart of your church

- Report on ministries or programs
  - Testimonials
  - Videos
- **Members love to hear stories** directly from staff, volunteers, or, if appropriate, clients
- Helps us understand the reality and realization of our gifts

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Reporting: The Mission

Impact is more important than budget

- Tell the story of your ministry
  - How many users
    - individuals served or visitors logged
  - How much use
    - number of meals served, kids tutored, backpacks assembled
  - Community response
    - Articles in local newspaper
    - Visits by city, county, neighborhood leaders
- Do this for each ministry or program area

Evaluating your campaign performance

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Reporting: The Members

Your members are the key of your mission

- **Recognize** volunteers
- **Report** on Sunday attendance or other markers of measure
  - If you are above or below goal, address it
- How are your small groups or other formation / social activities doing?
- **Present new opportunities** for engagement
  - Formation (upcoming classes or series)
  - Volunteering (programs that need more help)
  - Ministries (recruit for guilds and activities)

Evaluating your campaign performance

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Marking Success for Mid-Year

- Have an event, a special luncheon, the annual picnic, or a Zoom coffee hour to celebrate and report
- If you have an annual summer event, plan your mid-year review around it
- Make a small written (or designed) report that can be handed out, emailed, or posted online

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Theological Formation of Generosity

God is a god of abundance, not a god of scarcity. Jesus reveals to us God's abundance when he offers so much bread to the people that there are twelve large baskets with leftover scraps (see John 6:5-15), and when he makes his disciples catch so many fish that their boat nearly sinks (Luke 5:1-7). God doesn't give us just enough. God gives us more than enough: more bread and fish than we can eat, more love than we dared to ask for.

God is a generous giver, but we can only see and enjoy God's generosity when we love God with all of our hearts, minds, and strength. As long as we say, "I will love you, God, but first show me your generosity," we will remain distant from God and unable to experience what God truly wants to give us, which is life and life in abundance.

- Henri Nouwen

Keeping the Conversation Going

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TENS Theme for 2021

The theme and image for ***Every Perfect Gift*** are wrapped in the metaphor of the butterfly and chrysalis.

To the ancient Greeks, the butterfly represented the image of rebirth and freedom. The word they used for butterfly was *psyche*, and if you are thinking that sounds familiar, you are correct! It also means spirit. The humble and beautiful butterfly contains the philosophical and spiritual idea of the soul breaking free from its shell — free to **discover, to inspire, to create, to communicate, to share.** ***These are the results of our gifts of time, talent, and treasure***

Keeping the Conversation Going

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Thank you!

For more information, resources, and videos, find us at www.tens.org

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