



Called to Be the Church THE JOURNEY

PLANNING WORKBOOK

THE CONGREGATIONAL GIVING PROGRAM

The United Church of Canada | L'Église Unie du Canada

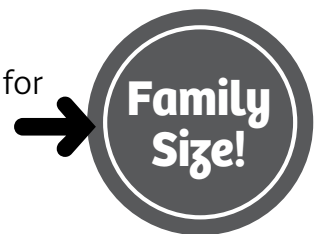
The Planning Workbook is a planning and recordkeeping tool for the Giving Team. It is referred to at various points in the Program Guide. Please start with the Program Guide.

Giving Team Members

Name	E-mail/phone



Follow the Family Size! icon to resources that are particularly helpful for family-sized congregations.



Choose Your Dates and Worship Series

Review the worship series and choose the dates for your giving program. There are worship series that correspond to a season of the church year and the lectionary, and options that don't. Each worship series includes everything you need: sermon, liturgy, and children/youth programming.

You can find out about the worship options for the giving program

- in the Worship Sampler booklet
- on the Stewardship in Worship webpage: united-church.ca/worship-theme/stewardship-worship

Invite Everyone

- Letter of Invitation/direct mail (see p. 13)
- Community Meal(s) (see p. 11)
- Person-to-Person Visiting Program

All methods of invitation include a welcome letter, a narrative budget, decision-making tools, and a Response Card with return envelope. See pages 23–30 in the Program Guide.

What Are Your Goals for This Program?

Add your congregation's information in the following tables in order to set goals based on current giving information.

Number of People Giving

Annual Donation Range (For All Purposes)	Current Number of Regular Givers in This Range	Our Goal for Number of Regular Givers in This Range	Total Donations (\$) in This Range	Our Goal for Total Donations (\$) in This Range
\$5,000+				
to \$5,000				
to \$2,500				
to \$1,500				
to \$1,000				
to \$500				
to \$300				
to \$200				
to \$100				
Total				

Calculate the Median Gift

Congregations who want to intentionally grow giving wisely start by exploring present giving. They ask, “Is there capacity to grow our giving?” Often the analysis begins with looking at present and past giving by focusing on the amount of the average gift. We in the church often talk about an “average gift.”

An average gift is, most simply, the sum total of all the gifts divided by the number of gifts. It can be a useful number and is easy to calculate. However, it can be skewed by outliers, such as one or two very large donations, or a large number of small donations.

The **median** gift, on the other hand, is a calculation a congregation can use to take a closer, and more meaningful, look at giving patterns. The median is the middle of a sorted list of numbers.

How to calculate the median gift

- List all donors (envelope number) and their total annual gifts, placing them in descending order from the largest to the smallest donors.
- Identify the donation in the middle of the list.

This means one can say, “Last year, 50% or half of donors gave more than \$XX (the amount of the middle donation) and 50% or half gave less than \$XX a year (or \$XX a month or a week).”

Giving Trends

Reviewing your numbers for the last three complete years can help you set achievable goals.

Year			
Amount given to community of faith			
# Identifiable givers to community of faith			
Median gift to community of faith			
Amount given to Mission & Service			
# Identifiable givers to Mission & Service			
Median gift to Mission & Service			
# Donors on PAR			
\$ Amount to community of faith from PAR			
\$ Amount to Mission & Service from PAR			
Total			

Our Goals

Check all that apply and add specific examples.

- To pray** about mission—in our community and for our Mission & Service partners
- To ensure** that everyone knows about our mission as a congregation and what we fund, and what Mission & Service is and what we fund through it
- To include** our local congregation’s mission and ministry and Mission & Service in the offering invitation and prayers
- To preach** about our local congregation’s mission and ministry, Mission & Service, and the life of the generous disciple or follower of Jesus
- To speak** about supporting our local mission and ministry and Mission & Service giving as a Christian spiritual stewardship practice
- To tell the story** of our local mission and ministry and Mission & Service on our website
- To invite every person** in our church to make giving to our local mission and ministry and to Mission & Service a regular part of their life of faith
- To increase participation** in local mission and ministry giving by _____ % or by _____ number of givers (e.g., We would like to welcome 20 new givers to our local mission and ministry and Mission & Service and have 20 other givers increase their gifts, so that the total giving increases by 10% and the average gift increases by 5%.)
- To increase participation** in Mission & Service giving by _____ % or by _____ number of donors (e.g., We would like to welcome 20 new Mission & Service donors and have 20 other Mission & Service donors increase their gift, so that the total giving increases by 10% and the average gift increases by 5%.)
- To increase** the number of supporters using Pre-Authorized Remittance (PAR) by _____ %
- To increase** the amount supporters are giving through PAR by _____ %
- To increase** the average gift to local mission and ministry by _____ %
- To increase** the average Mission & Service gift by _____ %
- To increase** the number of donors giving more than the median gift by _____
- To invite** people to take a step up on the Step Chart _____
- To increase** the number of gifts for local mission and ministry by _____ %
- To increase** the number of gifts for Mission & Service by _____ %
- To set a goal** for local mission and ministry giving of \$ _____
- To set a goal** for Mission & Service giving of \$ _____

- To share stories from the congregation** of why people give to our local mission and ministry
- To share stories from the congregation** of why people give to Mission & Service
- To thank the whole congregation** for giving to God's local mission and ministry
- To thank the whole congregation** for Mission & Service giving
- To thank the United Church Women (UCW)** for giving to God's local mission and ministry
- To thank the UCW** for Mission & Service giving

Our main goal:

Our secondary goals:

We will measure success by:

Program Timelines

Five-Week Program

Date(s)	Description	Volunteer(s)
Before program period—at least a month or more before Sunday 1		
	<p>Review</p> <p>Why I Give: An Exercise for Sharing Inspiring Stories (Program Guide, p. 18)</p> <p>Narrative Budgets (Program Guide, p. 19)</p> <p>Planning for Community Meal(s) (p. 11 and Program Guide, p. 24)</p> <p>Planning for a Letter of Invitation (p. 13 and Program Guide, p. 27)</p>	
	<p>Worship and Children’s Program†</p> <ul style="list-style-type: none"> • Give the minister/worship leader/worship committee the worship outlines and sermons to review. • Plan to commission and thank the Giving Team members before or on Sunday 1. Be creative! 	
	<p>Communication, see pp. 14–15</p> <ul style="list-style-type: none"> • Decide when to announce the program (at worship, in the bulletin, etc.). • Give Christian education leaders the children’s program sessions. • Draft all communications (if appropriate for your context). 	
	<p>Planning for Community Meal(s), see pp. 11–12, and/or Letter of Invitation, see p. 13</p> <ul style="list-style-type: none"> • Community Meal(s): Schedule for mid-program, ideally between Sundays 3 and 5. Plan the invitation process. Invite individuals to share their “Why I Give” story. Hand out the package of materials: letter; narrative budget; decision-making resources; and Response Card with return envelope. <p><i>and/or</i></p> <ul style="list-style-type: none"> • Letter of Invitation: Package of materials (see next page, under Program Week 1) delivered to each identifiable giver immediately following Sunday 1 and no later than the Saturday before Sunday 4. Between Sunday 4 and Sunday 5, follow up with those who have not responded. 	

†Week 1 for each of the five-week programs is found in the Worship Sampler; the complete worship series can be found at united-church.ca/worship-theme/stewardship-worship.

Date(s)	Description	Volunteer(s)
	<p>Program Week 1</p> <ul style="list-style-type: none"> • Communication Program: issue an announcement, bulletin insert, e-mail, or other communication vehicle to introduce/outline the giving program to the congregation. • Assemble and deliver an Invitation Package for each person/household, including: <ul style="list-style-type: none"> • Welcome and Letter of Invitation from the Giving Team • Narrative Budget • “Why I Give” testimonials • Decision-making resources: Giving Guide and Proportional Giving Chart and/or Step Chart (Program Guide, pp. 32–36) • Response Card and return envelope • Schedule of adult, children, youth, UCW, and other learning programs; determine what children will be learning in children’s programs • Other vehicles that draw attention to the ministry of the congregation and the giving program* • Community Meal(s): Begin planning. 	
	<p>Program Week 2</p> <ul style="list-style-type: none"> • Continue Communication Program (see Program Week 1). • Gather Response Cards. 	
	<p>Program Week 3</p> <ul style="list-style-type: none"> • Continue Communication Program (see Program Week 1). • Host the Community Meal(s) between now and Week 5. 	
	<p>Program Week 4</p> <ul style="list-style-type: none"> • Continue Communication Program (see Program Week 1). • Host the Community Meal(s) between now and Week 5. • Follow up with those who have not responded or returned their Response Card. 	

*The five-week program Discipleship Is Stewardship includes a weekly section titled Stewardship@Home. Families can be given copies of these at-home reflection guides and/or referred to the website.

Date(s)	Description	Volunteer(s)
	<p>Program Week 5 and following</p> <ul style="list-style-type: none"> • Tabulate all gifts received so far and announce the total on Sunday 5. Continue to make announcements as appropriate over the following weeks. • Plan to thank everyone at Sunday worship. 	
	<p>Personal Thanks</p> <p>Thank each giver personally, either in person or with a thank-you note or card as soon as possible after their Response Card is received, or after Week 5 if you'd rather wait until all gifts are in.</p>	
	<p>Wrap-Up and Evaluation</p> <ul style="list-style-type: none"> • Continue to follow up with those who have not responded or returned their Response Card. Thank them when they do. • Debrief, do an evaluation (see p.16), and plan for next time. 	

Three-Week Program

Loving Our Neighbours Near and Far is a three-week program[†] featuring worship, sermons, and children's program resources.



Date(s)	Description	Volunteer(s)
Before program period		
	<p>Planning: Worship and Children's Program[†]</p> <p>A month or more before Sunday 1</p> <ul style="list-style-type: none"> • give the minister/worship leader/worship committee the worship outlines to review • give Christian education leaders the children's program sessions • plan the communications strategy (see pp. 14–15) • decide whether you will add an invitation element: Letter of Invitation or Community Meal(s) 	

[†]Week 1 is found in the Worship Sampler; the complete worship series can be found at united-church.ca/worship-theme/stewardship-worship.

Date(s)	Description	Volunteer(s)
	<p>Introduce the Program</p> <p>Two weeks before Sunday 1 or in Program Week 1, announce the giving program in Sunday worship:</p> <ul style="list-style-type: none"> • make an announcement in Sunday worship and in the bulletin, newsletter, and website (see Communication Resources, p. 15) • possibly supplement this announcement with an individual’s or a Giving Team member’s “Why I Give” story 	
	<p>Invite: Letter of Invitation, see p. 13</p> <p>Two weeks before Sunday 1, write the Letter of Invitation and prepare a package of material to deliver to every identifiable giver or every household:</p> <ul style="list-style-type: none"> • Letter of Invitation (consider including a handwritten thank-you note at the beginning or end of the letter) • Decision-Making Tools (samples in the Program Guide, pp. 32–36) 	
	<p>Program Week 1</p> <ul style="list-style-type: none"> • Hand out the individually addressed Letter of Invitation and Invitation Package at worship. Deliver or mail those not picked up. • Highlight one program or ministry that is central to the life of your community: What is its impact? • Publicly thank those who are leading or supporting that program or ministry. Be creative in your thanking—make it timely, personal, and sincere. 	
	<p>Program Week 2</p> <ul style="list-style-type: none"> • In your worship, include one or two Mission & Service stories from Stories of Our Mission at united-church.ca (search “Stories of Our Mission”) or a video from the Your Generosity Matters playlist on the United Church YouTube channel, youtube.com/c/unitedchurchofcanada/playlists. • Remind people to return their Response Cards next Sunday. 	

Date(s)	Description	Volunteer(s)
	<p>Program Week 3 and following</p> <ul style="list-style-type: none"> • This is the Sunday to preach on generosity and gratitude. While inviting generosity, you will also want to show gratitude for gifts received. • Receive the Response Cards at the offertory. • Dedicate and celebrate the Response Cards as a symbol of people’s generosity. 	
	<p>Thanking, Wrap-Up, and Evaluation</p> <ul style="list-style-type: none"> • Follow up with those who have not yet responded or returned their Response Card. • Thank each giver personally, either in person or with a thank-you note or card. • Debrief, do an evaluation, and plan for next time. 	

All in One Gratitude Sunday

All in One Gratitude Sunday worship, sermon, and children’s time resources are in the Worship Sampler, p. 96.



If creating a multiple-week giving program isn’t possible for your community, you might focus on planning a one-time service devoted to gratitude.

Generosity is built on a foundation of gratitude, so holding a Gratitude Sunday may help prepare the way for another time when you can inspire and invite more generosity from people in your community.

- Preach on gratitude.
- Share your own experiences of gratitude in a sermon.
- Offer your own gratitude in a sermon.
- Invite others to share their experiences of gratitude.
- In a sermon, invite members of the congregation to join in a discipline of
 - keeping a daily Gratitude Journal
 - sending two (or five) thank-you cards a week to people they have noticed doing good things
- Return to this theme in a few weeks and ask people to share their experiences of increasing gratitude in their daily lives.

We thank God for the blessings in our lives. God is generous again, again, and again. Consider how you can say “thank you” or show gratitude again, again, and again—and in many different ways. Find opportunities to say “thank you” directly. Find opportunities to deliver your thanks personally. Gratitude needs to be planned if it is to become a habit in your congregation.

Inviting

Planning for Community Meal(s)

Date	Notes	Volunteer(s)
Before the event		
	<p>When and where</p> <ul style="list-style-type: none"> • Review Community Meal(s) in the Program Guide, p. 24. • Identify whether you will host one or more meals. • Set date(s). • Decide whether your speakers will share their own giving story or speak to the impact of the congregation’s ministry. • Prepare the menu. • Fine tune your agenda. • Identify a host for the evening (Giving Team co-leads might share this role). 	
	<p>Invitation</p> <ul style="list-style-type: none"> • Prepare invitations using as many communication vehicles as possible: written invitation, personal call, web posting, announcements, etc. • Table hosts could be asked to invite those who are to sit with them. (This might provide an opportunity to update information for the congregational records.) 	
	<p>Table Hosts</p> <p>Recruit a host for each table who will</p> <ul style="list-style-type: none"> • draft a script and select a grace • invite those who have already made an intentional gift to share their “Why I Give” stories • lead the conversation over dinner 	

Date	Notes	Volunteer(s)
	<p>Invitation Package</p> <ul style="list-style-type: none"> • Welcome/Letter of Invitation from the Giving Team • Narrative Budget • “Why I Give” testimonials • Giving Guide and Proportional Giving Chart or Step Chart • Response Card and return envelope • Schedule of adult, UCW, youth, and other learning programs; include what children will be learning in children’s programs • Other vehicles that draw attention to the ministry of the congregation and the giving program <p>Envelope or folder for each person/family, to be handed out at each gathering = _____ packages.</p>	
At the event		
	<p>Advance Room Set-up</p> <ul style="list-style-type: none"> • Arrange tables and chairs with a focus on a podium. • Have handouts ready, including an agenda, menu, and all invitation resources. • Set up a laptop and large screen for viewing “Why I Give” stories. 	
After the event		
	<p>Follow Up</p> <ul style="list-style-type: none"> • Within two or three days, send a handwritten thank-you note to everyone who attended. Remind them about the Response Cards. • Follow up with those who have not yet responded or returned their Response Card. The goal is to have everyone return their card, regardless of whether they give or not. 	

Planning for a Letter of Invitation

Date	Notes	Volunteer(s)
Before the event		
	<ul style="list-style-type: none"> • Review letter-writing guidelines (Program Guide, pp. 27–31) and draft a Letter of Invitation. • Set the delivery or mailing date: immediately following Sunday 1. 	
	<p>Mail or deliver the Invitation Package, which will include:</p> <ul style="list-style-type: none"> • Letter of Invitation • Narrative Budget • “Why I Give” testimonials • Giving Guide and Proportional Giving Chart / Step Chart (Program Guide, pp. 34–35) • Response Card and return envelope • Schedule of adult, UCW, youth, or other learning programs; include what children will be learning in children’s programs • Other vehicles that draw attention to the ministry of the congregation and the giving program <p>Envelope or folder for each person/family = _____ packages.</p>	
After the event		
	<ul style="list-style-type: none"> • Within two or three days, send a handwritten thank-you note to everyone who attended. Remind them about the Response Cards. • Follow up with those who have not yet responded or returned their Response Card. The goal is to have everyone return their card, regardless of whether they give or not. 	

Communication Program

Communication is so important to the success of any program. Regular communication builds interest, enthusiasm, and commitment. Use all available opportunities—worship announcements, bulletin inserts, e-mail lists, church website, and social media—to stay connected.

Communication Plan Template

You might use this chart for each week.

Communication Plan For Program Week _____	Date of Communication	Description/Text/Notes
Announcement, video, or slide presentation in worship on Sunday 1		
Sunday 1 bulletin cover or bulletin insert		
E-mail: Monday/Tuesday - recap last Sunday Thursday/Friday - intro to coming Sunday		
Church website		
Facebook		
Other		
Other		

Communication Resources for Various Roles

Role	Resources
Giving Team and other congregational leaders and staff	<ul style="list-style-type: none"> • Sample e-mail signature with set-up instructions for all Giving Team members and congregational staff to use when implementing this program
Church administrator	<ul style="list-style-type: none"> • Create bulletin insert, bulletin cover
Website managers	<ul style="list-style-type: none"> • Sample tag for your church’s website • Mission & Service “Did You Know?” slides • Brief “Why I Give” slide presentations • <i>Your Generosity Matters</i> photo and video section
Social media team	<p>Suggestions and samples for at least five social media posts with artwork for each week</p> <ul style="list-style-type: none"> • Thank-you videos: <i>Mission & Service</i> and <i>Called to Be the Church</i> • Mission & Service “Did You Know?” slides • Brief “Why I Give” slide presentations • Photo and video section • <i>Your Generosity Matters</i> weekly story
AV team	<ul style="list-style-type: none"> • Digital slides for each Sunday of the program • Thank-you videos: <i>Mission & Service</i> and <i>Called to Be the Church</i> • Mission & Service “Did You Know?” slides • Brief “Why I Give” slide presentations • Photo and video section • <i>Your Generosity Matters</i> videos and photos

Download extra copies of this workbook from the
Called to Be the Church: The Giving Program—Do It Yourself page on

united-church.ca/stewardship

Evaluation

1. Review the goals recorded on pp. 2–5. How did we measure up?

2. What worked well?

3. What will we do the same next year?

4. What we will do differently next year?

5. Our next steps:

united-church.ca/stewardship

We Want Your Input

To help us improve *Called to Be the Church*, please share your ideas: **called@united-church.ca**