

# Tools to Grow Your Giving

## How to Sustain Funding for Your Parish's Mission

*Most Catholic parishes have either run an increased offertory program or have at the very least considered one. Many finance councils and business managers find that the increase they see as the responses come back are only temporary. All too often, parishioners fall back on past giving habits, leaving the parish with no real-long term change in offertory patterns. Tim Potrikus, LPi's Vice President of Custom Services, takes a look at how to build a culture of sustained generosity.*

If you're Catholic, you've seen them. Heck, if you're responsible for the fiscal well-being of your Catholic parish, you may have even created them! I'm referring to the ubiquitous mailing campaign and pew card responses where we call on our parishioners to "be a bigger part of our church" and ask for an additional \$5 each week. When we ask, parishioners respond. But when we fail to talk about the future, parishioners tend to go back to old habits. They place \$5 or \$10 in the envelope—most weeks (39 out of 52 according to most surveys)—or perhaps toss a stray \$20 in the weekly collection basket. Unfortunately, that can leave our churches with strained budgets, and lacking the financial resources they need to truly fulfill the mission of their parish.

Unfortunately, we can't publish a paper and tell you how to fix it. I've had the pleasure of presenting to groups of parish leadership throughout the US over the past several years. People from somewhere near two thousand different Catholic churches in total have attended over that time period. They come from parishes that are urban or rural, large or small, wealthy or financially struggling. I have yet to find two parishes that are identical—each has its own unique strengths on which it can build its spiritual and fiscal health. There are, however, some common threads we can use to evaluate, recommend, and deploy strategies to change offertory patterns for the better.

### CHANGE PARISHIONER GIVING HABITS

The best place to begin creating a sustained change in parishioner giving habits is to define current behaviors and understand the elements that drive those behaviors. We recently worked with a parish on an assessment of its parishioner giving habits, and I was questioning one of the line items on its income statement. It turns out that the parish has one regular, recurring collection that is recorded outside the normal offertory so as to "avoid the diocesan tax" on part of its offertory. In another case, parishioners were disappointed at the loss of a chapel (due to budget issues), and those who supported the chapel voted with their offertory. They simply stopped giving—some even started attending Mass at a different parish. In both cases there were issues at work in the parish culture that affected not only giving patterns, but participation in the parish. Understanding those elements and working toward clarifying the vision for the parish begins to address the issues of engagement, both in the parish mission and its fiscal health. They are irrevocably tied together.

In his book *The Seven Habits of Highly Effective People*, author Dr. Stephen R. Covey states, “Begin with the end in mind.” We agree with this principle wholeheartedly! A letter campaign is fine, but how do you measure success? Perhaps responses come in, but successful programs establish a baseline for the regular recurring offertory at a given point of time, perhaps the prior calendar or fiscal year. The “end in mind” that Covey speaks of is best expressed as short-term (thirteen-, twenty-six-, and fifty-two-week) goals and longer-term projections for two and three years forward. Ideally, the parish sets goals for a trend toward sustainable growth. More importantly, the plan *and its progress* is shared with parishioners on a regular basis.

Donors expect transparency, and want to see not only financial progress, but how those financial offerings are being put to use to better the lives of the people whom the parish serves.

Most parishioners become a more active part of their parish when they feel they are not only aware of, but also a part of, the planning process on the work the church does. One conclusion that can be drawn from the Notre Dame study *Unleashing Catholic Generosity* is this ([www.4lpi.com/catholic\\_articles](http://www.4lpi.com/catholic_articles)): Catholics are twice as likely to give when they feel their parish has communicated their mission and vision in an excellent fashion.

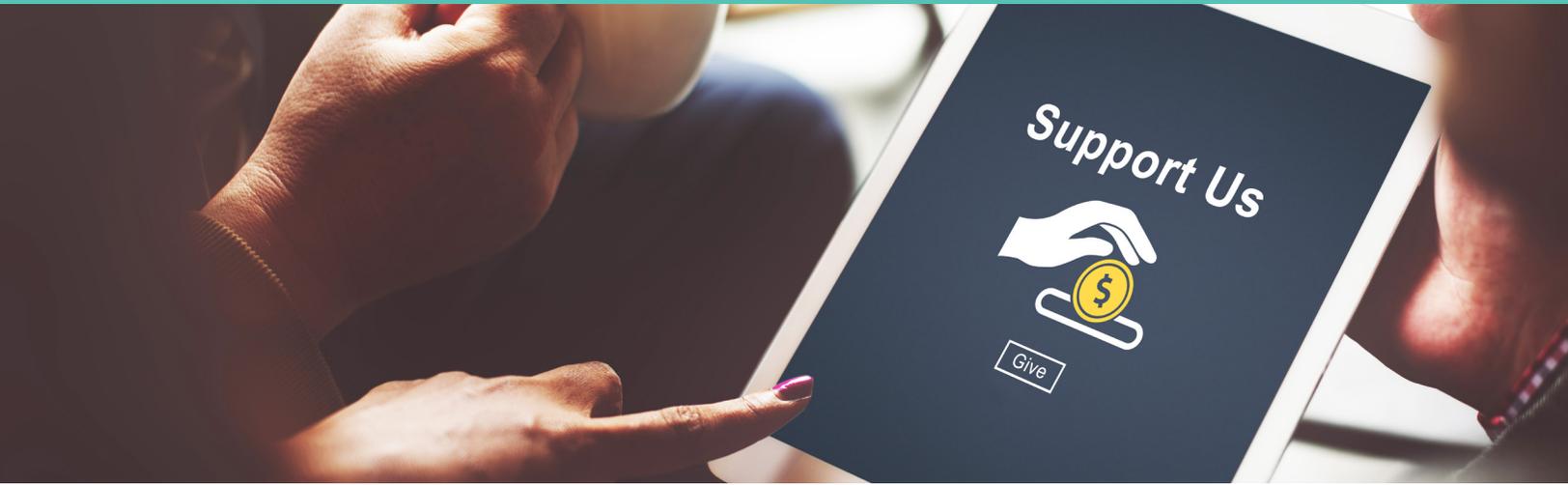
Effective communication goes beyond the current fiscal year. In an effort to develop fiscal discipleship, parishioners need to be aware of both the short-term and long-term needs of the parish. Funding a religious education program is an annual event, as are salaries and parish operating expenses; these routinely show up in church budgets and financial discussions. More uncommon is the parish that is setting funds aside for larger projects, and communicating those needs to the parish at large. A good yardstick is to review the insured value of parish property, and set aside a budget reserve of two to three percent annually for maintenance, repairs, and asset obsolescence. A parish with \$2–3 million of insured value in buildings, property,

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and assets may be stunned to think about \$40,000–90,000 *annually* for repairs and maintenance. But remember, some years will have minimal needs, and other years might require roof, HVAC, or parking lot repairs that can easily tip an otherwise balanced budget. Smaller projects—plumbing repairs or replacement of outdated sound equipment—can be easily paid for out of the funds set aside through the reserve line item. The benefit to this approach is that the need to ask parishioners to “give to the roof project” is replaced by prudent fiscal policies that ensure good stewardship of the properties and grounds entrusted to the parish.

One of the self-assessment questions I like to ask parish councils, finance councils, and leadership is this: What does your parish *do*? Search Catholic websites and it’s very likely that Mass times are posted. A Catholic Church celebrating Mass is not unique. While Mass times should surely be on the website, the website should also be engaging people to become part of the parish community through the charitable work of the parishioners. Celebrate the work you do that changes lives, and invite others to become part of that work. Share with donors the successes and the struggles of your work, but more importantly, let them know on a regular basis that without their generosity—as volunteers or as donors—these changes simply could not occur.

A good friend of mine who now works in development with the Catholic Church once said to me that any commercial company would absolutely love to have the customer base knowledge that the Catholic Church has. “We know when our



customers are born!” he said. Yet as a church, we do very little with that information as it relates to true participation in our faith. Today’s technology provides the ability to work with data that already exists in most Catholic parishes. Asking a widowed retiree living on Social Security, or a family facing a personal struggle at home to give more can have a negative effect on a parish campaign and people’s perception of their church leadership. On the alternate side of the spectrum, sending a major benefactor a form letter asking for a token increase could have an impact that is directly opposite the intended message. An overview of average gifts, median giving levels, and gift frequency—including parishioners with no record of giving and/or no record of ministry service to the parish, helps to define a custom outreach message to various groups in the parish. Understanding parishioner data and how to incorporate it into a long-term plan for sustained giving should not be left undone if the goal is to facilitate a permanent change in generosity.

With parishioner patterns identified, some future goals set, and the mission of the parish clearly defined, an engagement campaign can be constructed.

Successful campaigns go far beyond a letter asking for money; they involve plans for spiritual engagement, growth in stewardship as service, and growth in offertory results over a period of time from one to three years. At some point in that

cycle it is necessary to have “the money talk” with parishioners—but not every time; and not even every year.

## WHAT’S A GOOD TIME TO START?

During initial conversations with many of the parishes we’ve served, we are often asked, “When is it a good time to start an increased offertory program?” I like to respond with a question of my own: “It depends. What would you do with an additional \$75,000 each year?” While there’s never a good time to ask for money, there’s never a bad time either. The more important decision is how to integrate an offertory program with other elements affecting the parish, community, and diocese. Catholics are easily confused by myriad local, diocesan, and national collections—plus annual appeals, capital campaigns, endowments, school needs, and emergency appeals. The messaging becomes critical for each of those activities, yet there is a greater need for an overall message of charity to parishioners. Our observations have been that when giving—overall giving—is presented as opportunities for Catholics to be generous, the response is more positive than when it is simply another message of “more giving.”

Parish leadership and staff likewise needs to recognize that everyone cannot respond to every opportunity. Those with a passion for Catholic education are much more likely to respond favorably when they know their gifts will be used for education; those with a desire to help the hungry

will readily respond to an appeal related to hunger. In its national study on US Catholic giving habits, Catholic Relief Services realized that most Catholics who are in a demographic that can support charitable work no longer believe that world hunger can be eradicated. However, they do believe that their contributions to drill a well for clean water can have a positive impact on individuals in a defined community. Creating a message that adds a tangible or visible perceived result has a profound impact on the response rate to an appeal. Further, once engaged in the work being done, donors are far more likely to respond favorably to future appeals.

A clear message deserves the attention of an entire audience. Expressing the mission and vision, and distributing the message, extends far beyond the volunteers, the paid staff, and the weekly parishioners. It needs to extend beyond the walls of the church. Moving content beyond a posting on the bulletin board or a snippet in the weekly bulletin requires additional work; however, keeping parishioners informed is a key component of sustaining engagement. Typical distribution might also include prominently featuring stories on the parish website of parishioners at work in the community. Encouraging parishioners to promote events and their role in your ministries on their personal social media sites extends the range of communication to families who may be new to the community or unfamiliar with the parish. These works of charity and sacrifice build a personal relationship between the volunteer and the mission of the church, and results in a deeper feeling of belonging to the parish—and wanting to see it succeed.

Celebrate the successes. As Catholics, we are often humble in the work we do, perhaps to a fault. While

it may not be wise to broadcast every detail of our work, it is beneficial to engage our faith community on both the work we do, and the responsibility each parishioner has in those endeavors. We celebrate strengths as Catholics, often identified as the gifts we are given through the Holy Spirit. Yet few Catholics realize that when their top four strengths are placed in order of strongest first, only one in nearly 250,000 will have the same strengths in that same order. Churches can realize a sustainable change in their parish culture when they evaluate parishioner strengths, then express to them that it is not someone else's responsibility, but that it is rather each individual's responsibility to respond to the needs of the church. When done as part of a plan for long-term success, parishioners become inspired to be a living example of their faith.

For those doing the hard work of changing their parish, it is important to understand that sustainable change happens slowly and happens over time. One of the most difficult parts of implementing and executing a plan will be the inevitable setbacks or unmet goals. However, the plan becomes a roadmap and, like a map, if a route becomes blocked, an alternative route can be evaluated and the ultimate destination achieved. Myriad decisions need to be made in developing a true plan for sustainable generosity. Often the most important decision is the decision to start. Each week that passes takes us closer to the close of another fiscal year; one that can close with a positive improvement in fiscal health or close with the financial challenges that seem to plague our churches year after year. Successful campaigns are the result of deciding to move forward with meaningful direction.

*Along that route, it is important to remind ourselves not only of the final destination, but the joy in envisioning our destination and the anticipation of the adventure along the route we've chosen to get there. Building a sustainable future for our parish is not impossible; in fact, it is within easy reach. Often the most important decision is the decision to start, and defining the reason to start now.*



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*Tim Potrikus and his team work with churches throughout the country to evaluate parishioner giving habits, recommend development plans, and work in partnership with parishes to ensure continued success.*

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