

Virtual Stewardship 201: Campaigns & Offering Plates Best Practices

J. Davey Gerhard *Director of Development*
Diocese of California



Learning Objectives

- ▶ Creating relationship virtually
- ▶ Updated best practices on virtual giving
 - 2021 pandemic edition
 - ▶ Social Media
 - ▶ Mission Matters
- ▶ The Virtual Offertory
- ▶ Virtual Offering Plates and Giving Platforms – an updated list

Introduction



It's all about Relationship

Fundraising, like any human venture, is about forming, nurturing, and respecting our relationships.

This is even more important in communities of faith, where we ask each other for our gifts of **experience, wisdom, and resources** to build our churches and sustain our mission.



Virtual Relationships

dio
CAL

Online Giving Truths

- ▶ Financial Costs of electronic giving are real
 - ▶ They are a modern cost of doing business
 - ▶ According to the 2019 Lake Institute study on Faith and Giving
 - ▶ It's not just Millennials and Gen-Z who give online. **People aged 40-59 are the largest group of online donors**
 - ▶ But, **Millennials are the most generous generation**: 97% have made a gift to charity
 - ▶ Faith-based online giving has grown **8.8% in the last 2 years**
 - ▶ **59% of donors 66 and above** have made gifts online
 - ▶ Across mainline Protestant denominations in all areas of the US, churches that accept donations online **increase their giving by avg. 32%**
 - ▶ You are leaving money on the table if you do not accept online gifts



Virtual Relationships

dio
CAL

Virtual Giving Practices have improved since last year ...

Social Media

- ▶ Starting a movement
- ▶ Video campaigns
- ▶ Giving Tuesday
- ▶ Crowdfunding

Other channels

- ▶ Improve your online giving website / portal
- ▶ Text to give
- ▶ The power of recurring donations

Perennial fundraising good ideas

- ▶ Communication strategies
- ▶ Matching gifts and One for One campaigns
- ▶ Giving from securities



dio
CAL

Social Media Works

- ▶ Starting a movement & Video campaigns
 - ▶ Your **youth already know how** to do this!
 - ▶ Increases traffic to your social media channels where you can then **introduce viewers to your mission**
- ▶ Giving Tuesday
 - ▶ The Tuesday after Thanksgiving. Every other charitable institution asks for special one-time donations. **There's no reason your congregation can't try**
- ▶ Crowdfunding
 - ▶ Special projects or initiatives
 - ▶ GoFundMe
 - ▶ Facebook

Virtual Giving Best Practices



Do you see how many views this got?

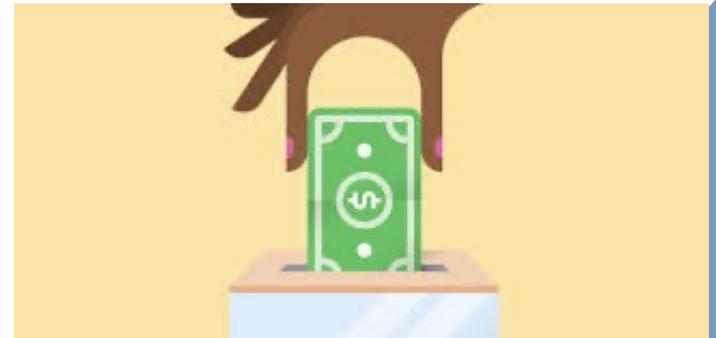
dio
CAL

Your Website

Other channels

- ▶ Improve your online giving website / portal
 - ▶ Your website should have an **easy-to-find way to make a gift** with minimal clicks to complete
 - ▶ Use contact forms to create your **virtual pledge form**
 - ▶ The power of recurring donations
 - ▶ TENS has created a guide to help you create a successful online giving portal
 - ▶ <https://www.tens.org/resource-library/tools-best-practices/online-donation-form-best-practices/>

Virtual Giving Best Practices



dio
CAL

Text to Give

- ▶ 2020 saw a dramatic increase in church text-to-give campaigns
- ▶ **98% of text messages are opened within three minutes of receipt** – your message literally in the hands of your members
- ▶ Average **text gift size is \$107**
- ▶ Short, simple, mission-focused texts work best
- ▶ A single call to action
 - ▶ Use text message for fundraising
 - ▶ Make sure you have a **one-click way for people to make text gift**
 - ▶ Virtual auction bids
 - ▶ Volunteers needed
 - ▶ Prayer outreach



Mobile Giving

For US members:

- ▶ January 2020: Venmo is no longer accepting new applications for nonprofits and churches



Virtual Pledge Form Best Practices

- ▶ **Simplify your form** – ask just the basic questions
- ▶ Brand your form to look like your church materials – **make sure people know it's yours**
- ▶ Aim for as **few clicks** as possible
- ▶ Ask for **recurring gifts**
- ▶ Ask for **matching gifts**
- ▶ Check-box for “more information” on church programs or planned giving
 - ▶ Do not try to collect this on your simplified form, or it won't be simple
- ▶ Send out an **automated donation receipt**



Virtual Giving Best Practices

dio
CAL

Don't Forget the Ritual of the Offertory

Invite: Use one of these alternate offertory sentences specifically developed for virtual gathering. These come from the Rev. Kay Sylvester, Rector of St. Paul's, Tustin, CA, with gratitude

- ▶ Let us offer our gifts, so that God will bless and break them like holy bread, and use them to nourish the world.
- ▶ As Jesus fed thousands on a hillside from a small, shared meal, let our shared gifts multiply and bring God's kingdom near.
- ▶ Creator God, gather our gifts from the four sacred directions as we give you thanks.
- ▶ Let us offer our holy gifts as seeds; may we plant and water them with God's help; may God's grace yield a harvest of new life.
- ▶ With grateful hearts, let us give what we have. With joyful hope, let us give for what can be.
- ▶ Let us love God and love one another by offering our gifts to the work of love.

Virtual Offertory



dio
CAL

Don't Forget the Ritual of the Offertory

Gather: In this moment, we take time to virtually pass the offering plate representing our gifts, hopes, and prayers to the Creator and our community. When gathered virtually, take the time to observe the solemnity of this moment

- ▶ Ask people gathered remotely to use this time to make their weekly pledge online
- ▶ Have a moment of silence for people to complete the action of online giving, or to give gratitude for what they have received

Bless: Making an action of Orans, bless the gifts that have been presented virtually by our members, give thanks

Break: Just as the gifts of bread and wine are broken and shared, so too our gifts of treasure, time, and talent are shared with a needful world. Take a moment to name the ministries supported by your congregation as a remembrance that our virtual work has very real impact in our world.

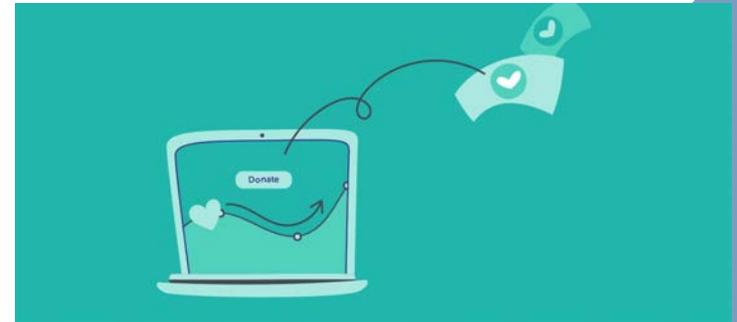
Virtual Offertory



Best Practices for Virtual Giving Campaigns

1. **Select the technology** that you will use for virtual offering plates.
2. Develop your **case / collateral** to be sent electronically
3. **Download** the free TENS resources for virtual campaigns. Use the weekly meditations and liturgical resources to focus your campaign
4. Select leaders to facilitate **small-groups**
5. **Enroll** everyone in small groups
6. Celebrate, Acknowledge, Thank!

Online Giving Technologies



dio
CAL

Virtual Offering Plates

Every congregation should have the ability to collect donations and pledges online and via mobile platforms in times of virtual and physical gathering.

- ▶ It is no longer usual for individuals to carry cash. More and more people use their credit and debit cards for transactions.
- ▶ Even in healthy times, passing a plate suggests many people touching a common item, spreading viruses
- ▶ Receipts are automatic, as are thank-you acknowledgements
- ▶ Most donation software gives you at least basic information to reach out to visitors – at bare minimum an email address or phone number tied to a real name
- ▶ Gifts are directly deposited into your bank and reports can be easily imported into your accounting software



Online Giving Technologies



Virtual Offering Plates

There is no reason to limit the number of platforms or methods for giving.

- ▶ **Donor-centric** – this means that we make it easy for the giver
- ▶ Don't leave money on the table (or in the purse). **Offer as many ways as you can implement** for your offering plate
- ▶ Pick platforms that integrate well with your accounting software. Most of the ones I'll be recommending integrate easily with Quickbooks

Online Giving Technologies



Platforms that emerged as leaders in 2020

Tithe.ly

- ▶ Text-to-give, one-time, and recurring donations all possible
- ▶ Backend reporting is robust
- ▶ Auto-responders and limited branding are easy to set up
- ▶ **DioCal Congregations get a reduced rate:**
<https://www.tens.org/membership/tithely-discount/>
- ▶ Set-up: Free
- ▶ Transaction 2.9% (discount 2.75%) + \$0.30
- ▶ Donors can elect to pay the transaction cost themselves, giving 100% of the donation to the church

Online Giving Technologies



Platforms that emerged as leaders in 2020

PayPal

- ▶ You can create custom page for churches
- ▶ It has the least friendly backend support, with little donor information going back to the congregation
- ▶ It has wide trust and brand recognition in the marketplace
- ▶ **Least expensive transaction cost**
- ▶ Set-up: Free
- ▶ Transaction: can be as low as 1.6% - 2.2% + \$0.30

Online Giving Technologies



Platforms that emerged as leaders in 2020

MinistryLinq

- ▶ Good back-end donor management options
- ▶ Monthly Fee: \$19 (for) church)
- ▶ Transaction 3.0% + \$0.39
- ▶ Donors can elect to pay the transaction cost themselves, giving 100% of the donation to the church

Online Giving Technologies



Platforms that emerged as leaders in 2020

CloverGive

- ▶ Monthly Fee: \$19 (for) church)
- ▶ Transaction 2.7% + \$0.39
- ▶ Has an event application that can be used for virtual event-based fundraising
- ▶ Offers Kiosks, too \$19/month + hardware

Online Giving Technologies

Clover Give[®]

dio
CAL

Platforms that emerged as leaders in 2020

Vanco Faith

- ▶ Monthly Fee: \$19 - \$49 (depends on church size and monthly use)
- ▶ Transaction 2.75% + \$0.45
- ▶ Offers text giving, kiosks, and event support for extra monthly fees

VANCO
FAITH

dio
CAL

Common Giving Platforms

Facebook

- ▶ Facebook has an integrated giving tool for qualified nonprofits and churches.
- ▶ During the COVID-19 pandemic (and possibly longer, it's pretty popular) **Facebook is not taking any transaction fees or other costs** for setting up fundraisers on its platform.
- ▶ If your congregation is using Facebook Live to stream services, adding a button to your profile connecting it to a Facebook fundraiser is an easy process

Online Giving Technologies





Thank you!

J. Davey Gerhard,
Director of Development
415-869-7836 (o)
415-307-0172 (m)
daveyg@diocal.org
www.diocal.org