Episcopal Parish Network
Where the Church Gathers

Summary and Transcript
The First 60 Days: Stewardship That Sets the Tone
Originally presented January 21, 2026

Summary

Panelists from several Episcopal parishes compared results from their 2025 pledge campaigns and progress toward 2026 stewardship goals, highlighting common participation levels and financial outcomes. They shared practical tactics for setting the stewardship tone in the first 60 days of the year, including volunteer structures, communications strategies, formation of new and younger givers, and use of small-group events. Webinar logistics and follow-up resource sharing were also confirmed.

Key takeaways:

1. 2025–2026 Campaign Performance

- Strong Momentum: Most parishes met or exceeded 2025 goals and are tracking toward solid 2026 results (ranging from 75% to 100%+ of goals).
- Targeted Success: Introducing "hard dollar targets" (Saint Paul's) and finishing campaigns by December 31 (Saint George's) were highlighted as significant milestones that improved fiscal clarity.

2. Engagement & Participation Trends

- The "50% Benchmark": Most parishes report that roughly 50% of known households pledge. Increasing this percentage remains a primary goal.
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- New Member Strategy: Successful parishes treat new member orientation as a "generosity masterclass," explicitly linking membership to financial pledging.
- Digital vs. Print: While over 50% of pledges are now digital, physical mailers remain highly effective. The consensus is "less is more": simplified letters and cards often outperform elaborate, expensive brochures.

3. Targeted Relational Events

- Small Groups: Intimate home gatherings and demographic-specific meetings (young families, empty nesters) are more effective than broad appeals.
- Peer-to-Peer: Events hosted by lay leaders (e.g., young couples hosting their peers) resulted in higher average pledges and increased participation.

4. Formation & Culture Building

- Start Early: Implementing Children's Pledge Cards (including time/talent prompts) is building a long-term culture of stewardship and increasing total household engagement.
- Holistic Giving: Parishes are moving away from seasonal "asks" and folding all needs (choir, outreach, etc.) into the annual appeal to avoid donor fatigue.

5. Leadership & Logistics

- Lay-Led is Best: While staff can manage logistics, parishioners respond most positively to lay leaders saying "join me."
- Stewardship Ambassadors: Using a large group of volunteers (e.g., 60+ "ambassadors") for short-term, bounded outreach in January helps close the gap on unpledged households.
- Segmentation: Using data to create specific "asks" (e.g., inviting $75/month donors to move to $100/month) has successfully "raised the floor" of the giving base.

Transcript

George Belshaw

Welcome, everyone. My name is George Balshaw, and I am the director of advancement and engagement at Christ Church here in Greenwich, Connecticut. And I'm also a board member at EPN, EPN where the church gathers. We are happy to welcome you to this webinar about setting the stewardship tone for the year, the first sixty days. We are so thankful that you are here and hope you'll take advantage of the multiple in addition to this webinar, multiple learning opportunities that we offer at EPN.

George Belshaw

Of course, our biggest event is our annual conference, which is a wonderful opportunity to meet your fellow colleagues face to face and make new connections. We're happy to announce that the 2026 annual conference will be held in Charlotte in March, And, there will be a stewardship preconference track, which two of our panelists will be leading, Natalie and Catherine. And I have been to the conference many times, and I have found the stewardship track to be very, very helpful and useful over the years. Just a couple of procedural items before we begin. First, this session is being recorded, which you may have heard before I started speaking.

George Belshaw

And you will all receive an email with a link to the recording and any additional materials provided by the panelists, which I don't think we really have today, but that's okay. And they'll post it. Laura will post it on the EPN webinar library, which should be available in the next twenty four to forty eight hours. Also, the q and a function is disabled for all of the EPN webinars. Please enter your questions in the chat, and we'll do our best to answer those questions. Laura will help leave those at the last at the end of the webinar, and we hope to answer those as time permits at the end.

George Belshaw

So a transcript of the chat will be available alongside the recording. So, again, thank you for being here, and let's get started. So we'll go around the room, and I'll ask everybody to introduce themselves and let us know what parish and location where they are located. So we'll start with Sarah-Emily.

OBJ Sarah-Emily Steinhardt

Hey, everyone. I'm Sarah-Emily Steinhardt with Saint Paul's Episcopal Cathedral in Oklahoma City, Oklahoma. So good to see you all.

OBJ George Belshaw

Natalie.

OBJ Natalie Aiken

Hi, everyone. I am Natalie Aiken, and I am at Christ Church in Charlotte, North Carolina. Looking forward to welcoming you all this spring later in the spring.

OBJ George Belshaw

And Catherine.

OBJ Catherine Beemer

And hello, friends. Catherine Beemer. I'm Director of Parish Giving at Saint George's Church in Nashville.

OBJ George Belshaw

And as I said earlier, I'm George Belshaw from Christ Church in Greenwich, Connecticut. So let's start with Sarah-Emily. How did your 2025 annual appeal go? That presumably ended a month ago. So how did it go?

George Belshaw

If you, yeah. Leave it there.

Sarah-Emily Steinhardt

So and just to clarify, you're asking how our pledge campaign for the 2026 year go?

George Belshaw

Yes. Correct.

Sarah-Emily Steinhardt

Just making sure. Okay. So, overall, I feel as though it went very well. At the cathedral, we did something a little different this year that it's been many years since we did this where we set an actual goal. Of course, you know you always have a budget in mind that you're trying to meet, but we set an actual goal.

Sarah-Emily Steinhardt

So currently and just to be very honest and transparent, we're I'm waiting for new numbers, but we're at about 75% of our goal. So I think there's joys and successes in that, and there are some, you know, challenging hard truths as well. We had great participation. I think, hopefully, this is, like, everywhere. People are sometimes slower to respond, so I know our dean has been working to try to have conversations with

our community that normally would pledge and just didn't have the chance or the opportunity.

Sarah-Emily Steinhardt

And our annual meeting is scheduled for this Sunday. Well, you may or may not have heard there is a massive, massive winter storm that is supposed to come. So anyone from Saint Paul's is listening. It hasn't been announced yet, but I think we're moving the annual meeting to the following Sunday. Shh.

Sarah-Emily Steinhardt

Tell anyone. But, anyways, that will give us an extra week to kind of work on finalizing pledges and balancing our budget. So I I would say mixed reviews. You're always happy. You're invigorated.

Sarah-Emily Steinhardt

You're excited to see work being done. I think this campaign for us or for me personally felt a little different with a hard number, a hard goal that we worked very hard to meet, we're currently a little bit short of that. So in one sense, that feels a little disappointing, but we're still really grateful for the faithfulness of our community and God's goodness. So

George Belshaw

Great. So, also, how did you speak about the 2026 campaign, which I assume you started in September, October?

Sarah-Emily Steinhardt

Right.

George Belshaw

So Okay. Fall late fall. 70 yep. You're up to 75% for that campaign. And, Kirsty, how'd you do for 2025?

George Belshaw

How did that wrap up in the end of this? Are there collections and all, you know, in the very end of the campaign? Yeah. Right. How'd that do?

Sarah-Emily Steinhardt

2025 calendar year, fantastic. No issue. I think this new 2026 year has a much different feel or tone for us because we set that goal that we're trying to meet. So and that's okay. We're gonna be fine, but it's just unique.

Sarah-Emily Steinhardt

It was just a different approach. And we had a stewardship team member who really was strongly invested in having that goal. We thought, well, let's give that a try, so we did.

Natalie Aiken

Mhmm.

George Belshaw

Good. Great. Yeah. Natalie, how did '20 the 2025 year end for you on your campaign? Were you ahead of goal?

George Belshaw

Were you behind? How did it go? How did it play out for you guys?

Natalie Aiken

Well, December is always really kind of a fun time. You know, all the priests and clergy get to have a week after Christmas off, but my team and the finance team spend the last week of December reaching out and trying to make sure we collect all the pledges that came in. So we ended up in the black, which is very exciting. We had actually budgeted a deficit, so we were a little bit concerned about that. This is, like, unofficial numbers.

Natalie Aiken

So, you know, I guess it's now on the Internet. So what are we gonna do about that now? But we feel really happy about it, and we've worked really hard. And so we're looking ahead to a strong 2026 too.

George Belshaw

That's great. How about you, Catherine? How did 2025 end?

Catherine Beemer

Ended great. I will say for the past three and then the campaign that we just wrapped up for the year 2026, Things have gone really well at Saint George's 2022. Was that the year? 2021. Well, anyway, we got, we called a new rector.

Catherine Beemer

And when that happened, we went from having one campaign chair to having two campaign chairs, which really meant most of the time, it's been two couples who've chaired the campaign. So this is the fourth year running that we've met and exceeded the dollar goal for St. George's. And I think a lot of that has to do with kind of spreading out, the reach of volunteers with two sets of campaign chairs who have different their own constituent groups, so to speak, their own circles of influence here at St. George's.

Catherine Beemer

So, yeah, we've managed to make the budget all four years and that's really happy news, but that our church is growing. And I will say that we don't so much publish our dollar goal. That information is given to our campaign committee and campaign chair, certainly. And I think word gets out about the dollar goal, but every year we do target a pledge number goal. And I think that that's a challenge many of us have is pledge participation.

Catherine Beemer

And our pledge number goal is to have 800 pledging households out of a 1,500 plus household church, and we're working on it right now to get to that number. I think we're at about seven fifty.

George Belshaw

So you guys it's certainly true at Christ Church Greenwich. Oh, by way, in our 2025, we met our goal. We exceeded our goal, which was always helpful. And so our 2025 annual appeal was a success. So that's encouraging, and certainly, the vestry is pleased when they hear that kind of information and certainly the rector too.

George Belshaw

So Mhmm. So that's all good stuff. So it sounds like, Catherine, that you guys have about roughly 50% of your households give and or pledge. That is that from a you know, you said 800 out of 1,500, so that's roughly 50%. So Mhmm.

George Belshaw

53 or so. Is that a pattern that Sarah-Emily and Natalie, did you find that as well? About half your constituent households give?

Sarah-Emily Steinhardt

It is here. Yes. Just about the same. Exactly. Mhmm.

Natalie Aiken

Mhmm. Yeah. Ours is a little over 50, but pretty close too. Mhmm.

George Belshaw

Yeah. Yeah. That's interesting. Because when I started doing a sewage job, It was like, 50. I mean, it's the same here.

George Belshaw

Right?

Catherine Beemer

So Mhmm.

George Belshaw

And, of course, to be a member of a parish, yes, you have to be known to the treasurer, right? Which, you know, is the church. What does that mean? That means you give, but not everybody gives, which is nature. But I was surprised when I first started doing stewardship with the church that it was only 50%. And love to figure out if anybody has some advice on how to fix that.

George Belshaw

Certainly, let me, and I'm sure the other panelists on this call know as well. So if any of you out there are frustrated by that number, it seems to be pretty much a standard number to the Episcopal Church.

Catherine Beemer

Mhmm.

George Belshaw

Any particular takeaways from 2025 that you have utilized in your 2026 campaign, which I assume clearly sounds like you didn't mention this, Natalie, I don't think, but you started your campaign in the fall. Is that right? Yeah. Okay. So we're all the same.

George Belshaw

Some parishes I know started in January. Very few, I think, but most start in the fall. Any takeaways from 2025 that you guys utilize in your efforts for 2026 the 2026 campaign? Emily sorry, Emily. I'll start with you.

Sarah-Emily Steinhardt

Sure. I have something I can share. So we started to notice a pattern that some of our children really wanted to be involved with pledging, giving, and wanted to be counted as their own individual, not necessarily part of a household. So we really decided to focus on that, talk with the children about stewardship and giving, weave it into our Sunday formation time. And we actually brought with me and I can share a digital copy at some point and make sure it's available as a resource?

Sarah-Emily Steinhardt

But we modified our main pledge card just for children so that they would have their own. And that's been really special, and it's actually been a little bit interesting. We've noticed the last two years in particular, our pledging households or, like, numbers of pledgers, that number has gone up, and that's because it's children, young people who are also pledging. And I, you know, let's be honest. It's not like that's, you know, giving us millions and millions or anything, but it's so important.

Sarah-Emily Steinhardt

It's laying such a foundation. It's planting seeds. It's creating a culture where they feel valued. They feel a part of everything. They're going to remember doing that.

Sarah-Emily Steinhardt

We typically have a consecration Sunday where everyone actually brings their pledge cards and presents them on the altar, and that's so meaningful, especially for everyone, but especially for those children. So it's really kind of sweet. When you look

at our number, like, oh, we've raised x. There's an odd little change in amount at the end, and for a while, it was, like, point three four, and now it's point eight seven or something. And you know that that's from some sweet little person who's like, I'm gonna give my x y z each month.

Sarah-Emily Steinhardt

So all that to say, I do think if you are not including your children, your from your, you know, teenagers on down to little ones, please do that or think about how you could weave in one small principle. Because while that may not be in, you know, this time frame, some, you know, big fish giver who's, you know, giving a whole bunch that you may be raising up someone who could be that someday, and it really invests them. And I will say one other small thing. Although, of course, we're focused on the, you know, financial principles of stewardship, we also asked, like, on the back end, it may be backwards to you guys. I apologize.

Sarah-Emily Steinhardt

But we ask people to share, you know, how will you also share your time, your talent? So not just your financial gifts, but, you know, is there somewhere you're not serving where maybe you could give a little more time and attention? And, you know, while it isn't financial, we've seen great benefits from that with people saying, you know, haven't been doing as much with this or that program, but I could really devote Tuesdays, or I could help you here or there. So it's been very powerful in that sense. So those are two ideas for everyone or something we've seen.

Sarah-Emily Steinhardt

It's been significant.

George Belshaw

Natalie, how about you guys?

Natalie Aiken

Sure. Yeah. Our annual campaign chairs for 2025 were a couple with young children. Their oldest, I think, is 10, and they have three children, which is really kind of a new demographic for us. And we were really excited and really focused on helping to move their cohort into pledging and up for those who were already pledging.

Natalie Aiken

And one of the things they did was host an event for their peers in their home, and they just were really passionate about it. They really wanted to do it. They managed the whole thing, sent out the invitation, and obviously everything related to the stuff that was happening in their home. And we were shocked. They had, I think, 65 people in their home.

Natalie Aiken

It was a huge turnout for that group. We really didn't know what to expect. And in addition to having a good turnout, the people that were there pledged more, and there were people that weren't pledging that started pledging. And just things like that, we saw a lot of good happenings because of that. And the event itself was really fun.

Natalie Aiken

The host spoke. One of our priests spoke, and there were lots of really dynamic questions from the floor, which was wonderful. And so this year, for 2026, the Vestry actually took it on as a goal. They were so inspired by the success of that event that they would host a number of goals for a number of events for different groups that they were a part of. So there was a team of three vestry members.

Natalie Aiken

One was the Christ Church, what we call Christ Church lifer, someone who grew up at Christ Church and is now back as a young adult. He actually has a small child also, so people in that cohort think he's maybe in his early thirties. And so he hosted an event for people that also grew up in Christ Church, and then we had two events for empty nesters, which at Christ Church, we noticed that once their children graduate high school, a lot of times they drop off for whatever reason. Like, it's busy in other ways and or they don't know the right way to connect now that it's not through their children. Like, they just have to find a new relationship with the church.

Natalie Aiken

And so we had two events for that group, and they both went very well. All three events were very well attended, but we've seen really wonderful results just from those events also. So I would encourage, you know, just to have opportunities for people to gather, particularly groups that may not be as engaged or may not know as much about how important their pledging is.

George Belshaw

Did you guys do any kind of new member? Was that a cohort for you guys?

Natalie Aiken

We actually didn't do a new member event because we have something new this year that our engagement and parish life office is doing called new member orientation. So we've done these new member dinners for a long time or newcomer dinners, which is really for anyone. They don't have to be interested in membership. They're just new to Christ Church, and those happen monthly. We've done those for years, but they started wanting to have something that was, like, the next step up.

Natalie Aiken

And so now we have a class that's, I think, every other month that they host called new member orientation, and it's for only a certain number of spaces available, and it's like a two and a half or three hour class on a Sunday afternoon. And they talk a lot. That whole class is designed around the concept of generosity and that being a member of Christ Church means necessarily that you give generously in all the ways you can. We are a generous community, and we give to each other. And so as part of that, they talk about making a pledge, and I also follow-up a few months after with a letter and information about pledging.

Natalie Aiken

So we really kind of let them be new members, and we have specific solicitations we send to them as part of the annual campaign. We may do an event for them at some point, but there's lots of other ways they're getting pulled in. So we didn't wanna, like, pile on too much and overwhelm them.

George Belshaw

It's like, if a new member comes in, you're like, you grab them. Right? Yeah. We're all guilty of that. I think I've scared away a few people because, you know, here's my card.

George Belshaw

What are you doing? You know? Anyway, so, Catherine, how about you guys?

Catherine Beemer

Well, I did take a page from Natalie's playbook. She and I talked, I don't know, sometime last year about the event she mentioned with the young couple who hosted. And this year, our rector committed to attend several small meetings, and we focused on different populations. We had one where we invited mostly empty nesters, one where we invited young families, and one was more young adult, young singles kind of thing. And those were hugely successful.

Catherine Beemer

The Rector was the main speaker, and he talked about the life of Saint George's and what it meant to be a member. And that making a pledge was part of being a member, but engaging in the community was part of membership. And I think that that's the key piece that any stewardship campaign has to have. I mean, it's one thing to ask for money, but it's a completely different scenario to get people actually involved and engaged in the church because that's what will help them continue to come back. That's what will make them want to come back.

Catherine Beemer

And especially for people who are new, you need those opportunities for them to come in and meet some people. And at these little small group gatherings, we had existing members of the parish, and typically, it was members of our stewardship committee who were there because it's difficult to have a newcomer event and everybody's new, and nobody knows anything about what's going on at the parish. So we mixed it up to make sure that any new people had a connection point with someone else who was a member so they'd see a familiar face. So that was really beneficial for us this season because we were able to talk about what was going on at the church and spread the message so that when they were sitting in the pews, they could share that information. And one other thing I'll mention that I I think made us successful, at least more successful earlier in the year, our campaign for the past several years, even though we've met the goal, it kind of drags on into February and even March.

Catherine Beemer

But this year, we had met the dollar goal before year end, and that was, like, a miracle of all miracles. We'd never done it before. And also our pledge numbers were higher earlier. Once we sent out the pledge cards, they started coming back very quickly. And I swear, I think it's because we did not mail everybody a brochure this year.

Catherine Beemer

We mailed them a letter from the rector that had the pledge card inside the letter. And in years past, we've done a very nice brochure. And if any of you were at EPN last year, you might have heard me talk about this fold out thing that we did that I loved. It's one of the best pieces we've done. But the pledge card is always hiding inside of it.

Catherine Beemer

And I really think this year, because the pledge card wasn't hiding in some inside of something, more people got it more quickly and they sent it in right away. And that would have been we mailed those in September. And we did get a pledge card in the mail just yesterday from a woman who is 92. The original pledge card, we mailed her in September. I don't know how she ever found that, but she did.

Catherine Beemer

And we're grateful for it. I mean, sometimes less is more. We've done brochures every year. We decided to not do one, and we had success, and we may go back to it. I don't know.

Catherine Beemer

Sometimes you you just have to throw the spaghetti at the wall and see what's going to work.

Sarah-Emily Steinhardt

We skipped the brochure this year as well, Catherine, and I don't think it hurt us in any way. I think we were just as successful, and we just also kept it simple with a letter and the pledge card. Makes sense.

George Belshaw

We've gone away from the blanket letter to everybody, and we go into the brochure. But interesting point, I you know, maybe it is time to go back because we're finding, you know, print material I mean, my point is that, you know, we all gave up on sending a lot of material out because you can go on get the information online, etcetera, etcetera. But we still find that print actually, you know, a piece of paper actually is quite impactful. So I thought it's a good thought to maybe go back to the old way. Natalie, how about you guys?

George Belshaw

What'd you guys do?

Natalie Aiken

We actually were just gonna chime in because I think I might have talked to Catherine about this already. So we had a podcast that we did that accompanied our annual campaign for 2026. And I am happy to share the link here if I can find it while we're during the question and answer session because it's awesome. Our director of annual giving is the host of it, and it's called With Generous Hearts. And we interviewed a variety of parishioners not about their giving, but different ways they're generous and with different types of people.

Natalie Aiken

And so our brochure was really short and sweet, but it was focused on this sort of podcast series and some of the other things. So we had and we also had a letter that accompanied it. One of the things we did this year that has been really exciting to see the progress of it is that we segment so we have nine different segments that we use this year based on past giving and different various different things. It wasn't all necessarily based on giving, but that's been really successful too, just making specific asks. We had previously just asked for, you know, percentages based on their past giving, and we realized that there are some people who that just doesn't track as well for so, like, for example, one of our segments are people that pledged under $900.

Natalie Aiken

And so for anybody in that group, we ask them for a pledge of $900, which works out to $75 a month, I think. And we've had so many people respond to us, and most of them have just gone up to a thousand dollars. And that's really exciting because that's really building our base. And once those people are more plugged in, then they're more likely to continue to increase, and that incremental increase will obviously help us more and more in the future. So we had tremendous success with that segmentation, and that was a letter that accompanied the brochure that has all the information about the podcast.

Sarah-Emily Steinhardt

That's so neat. Mhmm.

Natalie Aiken

It was really fun. It turned out great.

George Belshaw

That's great. Circling back to new members, out of curiosity, I mean, our new members track about 50%, and they're giving at around the average for the overall campaign. Is that similar with you guys versus the median is a different number, obviously, from the average? But the new members tend to give close to the average amount of their overall parish. Curious to know if others have found that as well.

Sarah-Emily Steinhardt

When you say new member, are you thinking, like, they've come on board in the last year or so?

George Belshaw

Yeah. Yeah. Exactly. Yeah. Yeah.

George Belshaw

Yeah.

Sarah-Emily Steinhardt

I'd say that's about the case for us then. Yeah.

George Belshaw

Mhmm. Catherine? You know what? I I I think

Catherine Beemer

it depends. So we've had a little bit of a different strategy the past few years at St. George's with new members. Even if you were an Episcopalian transferring from another parish, in order to become a full fledged new member of Saint George's, you must attend our class called Saint George's one zero one. It's held quarterly, and the content is all driven by the rector, the vice rector, and our director of lay ministry engagement.

Catherine Beemer

It is a dinner. It's about a two hour dinner, and the rector and vice rector talk about their own personal stories, how they came to be Episcopalians or how they came to Christ, and then talk about the life of Saint George's. And I think something interesting about Saint George's is that Nashville is such a growing city, and we're getting people from all kinds of backgrounds, many different faith backgrounds. And excuse me. Finding people who, I think, don't have any history of really being a part of a church, at least not being fully integrated and not giving to a church.

Catherine Beemer

So it's not only about asking for the money, but then really helping people understand this pledge now, pay later system that we have. And when you're a church with a multimillion dollar budget, you really have to do that. And that's not to say that you shouldn't anyway, no matter what size. It's certainly helpful to the director and the vestry to know what kind of budget they're working with. But it's been interesting to see that new member breakdown.

Catherine Beemer

So we will have new members. Last year, I can tell you, we had some new members who pledged $25,000, but they were new transfers coming from another Episcopal church. So they had that background in giving already. But then probably for brand new folks, I think that the average giving amount is probably somewhere between 600 and $1,200 a year. So it just the answer is it depends on that new member giving.

George Belshaw

Well, new membership, you know, as I learned this early on is one of the key ways of growing stewardship. And so we try to work on engaging our new members and encouraging them to give. And it's to your point, they don't not many people come from different denominations. They don't quite understand the importance of giving, or they expect the money to sort of come down from the sky. Mhmm.

George Belshaw

And it doesn't. And so, yeah, we've tried to get you know, encourage our new members to participate, and that is a strategy that we're gonna continue to push further into 2026. So I like these ideas of these these small group gatherings that, Natalie, you you've been doing and, Catherine, that you have borrowed from Natalie. And I will say, it's an old line, but the Episcopal Church is one of the greatest kleptocracies in the world. So we all take ideas from each other.

George Belshaw

The purpose of this seminar, webinar, really. So, absolutely, everybody has to do that. So that is alright. So, sorry.

George Belshaw

Well, you're about 75%. Catherine, did you say you completed your '26 campaign by year end?

Catherine Beemer

Yes. We did.

George Belshaw

Yeah. That's great. Natalie, how far along are you guys?

Natalie Aiken

We are about, I think, hold on. I actually pulled up my spreadsheet in preparation for this call, but I think we're about 88%, 89, for our dollar goal, and I think about 78 or so for our number goal, 79.

George Belshaw

So Right. Yeah. We're in the similar range here at Christ Church, so that's I'm sure there are other parishes out there which are gonna you know? It's always helpful to know how other people are doing just relative because you're like, oh my god. I'm only at 70% or, you know, I should be at 100%.

George Belshaw

I think, Catherine, you're kinda unique. I don't know. I think do you find that other parishes can, I mean, our goal is to finish by December 31, but I don't I haven't found in my conversations with with peers if that actually usually is the case? How about you? Have you what is yours?

Catherine Beemer

I think that's true. I mean, our goal is always to end by December 31.

George Belshaw

Right.

Catherine Beemer

And this is the first year that we've done it. I don't know what the secret sauce was, to tell you the truth. Some people said it was because they were afraid of one of the co chairs. I don't think that is the case. Okay.

Catherine Beemer

I just think that everything worked so well. We had great chairs. We had a committee that actually did the work, you know, feet on the ground. Again, not having that brochure with the pledge card stuffed in it, the small group meetings. I and members of the committee visited Sunday school classes and talked to folks there just briefly.

Catherine Beemer

So I took the show on the road, so to speak. So I think that there were just many things about the environment this year that went well and hoping that we can push repeat on that again.

George Belshaw

Right.

Catherine Beemer

But so much of it is the same. I mean, I think that with annual campaigns, you have things that work great one year and maybe not so great the next year, and you just have to keep doing the work and continue trying out new things. But the most important thing is to reach as many people as you can. And we have a big volunteer

committee, and that works well at St. George's because we have a lot of reach that way.

Catherine Beemer

Some parishes don't like to work like that. There's the one stewardship guy, and he makes all the phone calls. But I I think for St. George's, it just works for us to share the wealth, no pun intended, with everybody and have a broad, well represented committee of folks who will touch every constituent group in our population. It's just too much work to do alone.

Catherine Beemer

And the other thing is the members of the church are the ones who are always going to be there. It is the clergy who most often change. So we really focus on making sure we have some repeaters year over year who've done the work on the committee before. Just because they're you're gonna be sitting in the pews next to the same people regardless of whether or not your rector stays five years or fifteen years. At some point, they may, they will leave.

George Belshaw

Yeah. Yeah. Yeah. Do you know, volunteering is always just it's difficult to get people to volunteer. How challenging, Sarah-Emily, is it for you to get people on your stewardship committee?

George Belshaw

It's challenging.

Sarah-Emily Steinhardt

And I was thinking as I was listening to Catherine, our experience is a little bit different. So on our stewardship committee, our team is willing to do any number of things, but no one's scared of anyone on that committee because they're not following up too hard. Our dean does a lot of work. So I would like to see it more lay-led. And it's always interesting, like, what's for different congregations, what's got them to that point, or how do you raise up those leaders to take on more of the role.

Sarah-Emily Steinhardt

And it's interesting. I worked for just one of our other Episcopal congregations here in the Oklahoma City area, and it was the opposite. It was more like what I hear Catherine describing where the committee was very strong. The chair was really out there doing so much. So I don't wanna paint a picture that our committee isn't doing a lot.

Sarah-Emily Steinhardt

They are. We even have a meeting tomorrow, but I've seen experiences where it's been different. So it is challenging. It's tough, and I think by and large, a lot of people don't like to talk about money. They don't wanna be the one to ask someone for money that feels awkward or feels uncomfortable and icky.

Sarah-Emily Steinhardt

So it takes a certain type of person to be comfortable with that and be able to do that. It's a special niche for sure.

George Belshaw

Natalie, how about you guys? How is building a committee work for you guys?

Natalie Aiken

Yeah. So ours is set up a little bit differently, although I'm you know, I I think Catherine kind was kind of saying this earlier, but each year, we really of try and take fresh eyes and and see what we think is gonna work this year, what we're gonna try that's new, what we're gonna try that's the same or keep it that's the same. But the last couple of years, what we've done is we've had chairs. Although, actually, this year, we don't have lay leaders for our annual campaign, which I'm happy to talk about. That's been an interesting experiment also.

Natalie Aiken

But the last couple of years, we've had a group of stewardship ambassadors, and their goal is really to in January, they start they basically take the whole month of January. We have a group of 65 or 60 lay leaders who have agreed to make at least three contacts to people who have not yet pledged. And we have several people that have, that renew every year to do this one role. And I think part of it is that it's a really easy ask. It's just in January.

Natalie Aiken

It's just three contacts to 10 people. And so the earlier you get them to pledge, the fewer contacts you have to make. And we let them decide if they wanna contact people they know or people they don't know or newcomers, that kind of thing. And this year, we also reached out to the people that our director of annual giving visited all of our commissions, which so for each of the different ministry areas, she went to at least one of their meetings this year. So she reached out to people that were particularly engaged in that conversation, invited them to be stewardship ambassadors.

Natalie Aiken

We also have a group called the core class that they meet monthly, and it's a sort of leadership development thing that's not run through my office. It's like a function of the church. And we reached out to all those people, and the timing was actually great because I had visited them with our outreach director in October to talk about how we partner and why both are important. And so they were sort of primed to say yes into the ask to be a stewardship ambassador. And they're so successful.

Natalie Aiken

I mean, you know, Sarah-Emily was saying this too and so was Catherine, but it's really hard to say no to someone who's sitting next to you in the pew. You know? I mean, we're all here. We're all part of this community. And so having these people reach out is really compelling.

Natalie Aiken

So we found a lot of success in that, and I hope that this coming year, we start to think about having a lay committee. I like the idea of maybe advancing them earlier in the fall. I think we've always sort of thought that we make the ask in the letter, and we need to give people time to be able to pray and think about what they wanna pledge before we start bothering them to make their pledge. But it also is hard. I mean, the IAS would love to be done by December 31 and not be thinking about this now.

Natalie Aiken

So we're kind of training people to wait. But Mhmm.

George Belshaw

So you mentioned your committee is not lay-led. Could you expand on that?

Natalie Aiken

Sure. Yeah. So this year, for a variety of reasons, we decided to have it be staff led. We have a really high-functioning staff, people that have good experience doing annual giving work in churches. And so, we didn't have natural, like, late last year and really for the for the last several years, there's been kind of someone from the congregation or two people or a couple who has really risen to the top and been, like, an obvious choice that the rector has identified or that I've identified or some other person has said, oh, this person would be so great.

Natalie Aiken

And we just didn't find ourselves in that position in the spring last year when we really need to start making those decisions. And so we kind of went back and forth about it. We talked to our vestry about it and ultimately decided to have a Vestry and staff kind of partnership, but it's really more than staff led. The Vestry has been critically helpful, and they will continue to be. They are sort of the closers on the campaign.

Natalie Aiken

They're gonna make the calls after stewardship ambassadors are finished. And they hosted those events, and they have been really helpful advocates all along the way. They speak and worship during the annual campaign, the active phase in the fall and things like that. But as far as the logistical piece, we were really running it, and we didn't have laypeople who were, like, the face of the campaign. And one of the things that's been really interesting that I honestly hadn't thought about until a layperson asked me about it, but it was at that core class that I was talking about earlier.

Natalie Aiken

And we were talking about how important lay leadership is, and in the context of that, she asked me why we don't have lay leaders for the annual campaign. And it wasn't really in in, like, an aggressive way. It just was timed so perfectly that it made me

realize how deeply valuable it is to have someone to say, please join me. This is important for our parish. Even if like, I'm a parishioner at Christ Church, so I have a little bit of that, but it's just so so incredibly powerful to have a layperson leading that.

Natalie Aiken

And so I think I think we probably won't ever have this, I mean, I guess, I don't know. It seems unlikely, at least while I'm here, that we would do this again, not because it hasn't been successful. We've been very successful. But I think there's just something so valuable in having this be you know, Christ Church belongs to us. We, you know, we need to come together and do this as a parish instead of this, like, formal staff led campaign.

Natalie Aiken

So that was a long answer, but that's where we are.

George Belshaw

Oh, that's great. I like your line. You just said, Christ Church belongs to us. Mhmm. And I think that's actually a good line.

George Belshaw

I might use that. Because we're also still. Because we're also at Christ Church. Surprise. Surprise.

George Belshaw

No. That's, I like that. I like that. I think it's a good tagline. We're at pretty much the forty five minute mark, and I think it probably makes sense to Laura, if you could, review some of I know you've been reviewing the questions.

George Belshaw

If you could summarize, that would be and we'll just go you know, we can just freely speak and try to answer them as best as we possibly can.

Laura Manley (EPN)

Absolutely. And this group has had a lot of questions and great questions. So I'm gonna try to group them by theme as best I can. But first, I do wanna tell people that, yes, I already have a copy of the children's pledge card, and I will share that with the recording. So if, if there are any other resources that you all in the panel wanna share, if you have pledge cards, brochures, or anything that you wanna share that people can just look at and get ideas from, that would be great.

Laura Manley (EPN)

Just send them to me. But I already have that. So that'll be included with the recording. And you all will get an email. That was another question.

Laura Manley (EPN)

You'll all get an email with the recording link, and all the resources will be there too. So, another question was, I think this was for Sarah-Emily. It was the party that was hosted at someone's home. I think was that you or was that Natalie? Natalie.

Laura Manley (EPN)

Natalie. You're both on the same line on my screen, so I was like, I have fifty fifty shot. So what was the name of the party that they had? Was it themed for stewardship? And, you know, how was that advertised?

Natalie Aiken

Yeah. So it didn't really have a name, I don't think. Maybe, like, fall gathering or something very Okay. Generic. Mhmm.

Natalie Aiken

But they were a stewardship thing. That was the thing that was so surprising about the first one that we did with those two annual campaign chairs was they were very upfront. Like, come to our house and hear us talk about the annual campaign. And so, you know, I think people kind of appreciate that. They know what they're getting into.

Natalie Aiken

They're not surprised. There's not this bait and switch. And one of the things that we did that was really interesting that I didn't mention was we sent it out or they sent it out via Paperless Post. So we did the exact same thing when we had the best redo it when we were more on the logistical planning end. What's really cool about Paperless Post and probably other online platforms versus just having it, you know, run registration through Realm or something like that Mhmm.

Natalie Aiken

Is you can see everybody that's RSVPed. And so that's really helpful. So we can just call people and be like, hey. If you could just RSVP, and then people just start responding because they see their friends are coming. They're not intimidated by it.

Natalie Aiken

They know they're gonna get a hit up anyway, so they might as well get a glass of wine on Christ Church. And as far as how we invited people, we sent we for the one at the last year, they sent it to basically everyone in the age group. I mean, they were kind of like, we don't know how many people are gonna respond. So which is a pretty pretty big group of people. And this year, because we had the two empty nester events, the the woman who on the vestry who was in charge of that, she went through the list and, like, painstakingly picked out people that she felt like she knew that, you know, would would come to an event at her house because it's a really, really, really big group, and she I don't know.

Natalie Aiken

She just didn't want it to be overwhelming for anybody that was there or for the host. And so Mhmm. She did a pretty broad reach. Like, I think we still invited, like, 300 people, but the events had around, you know, 50 or 60 also each month. And so we did the same thing for the lifers, although there's not as many of them, so we may have been pretty loose with that as far as just inviting all of them.

Natalie Aiken

I hope that helps.

Laura Manley (EPN)

Okay. And a spin off question from that for anybody who wants to answer is, so when you do your asks or invite to parties or things like that, it is now, obviously, Natalie just answered the question for that party at the house. But do you send out church-wide invitations? Do you purposely target your invitations? Are they personal?

Laura Manley (EPN)

Are they from the rector directly, the whole staff? How does that work?

Catherine Beemer

Well, I can tell you that for our events, I did primarily email invitations, and it said an invitation from the rector. But the body of the email invitation said, join our rector for a glass of wine and to learn more about fall at Saint George's and the stewardship campaign or something of that nature. But it did not go to the entire church. Because with email, it was easy for us to sort and decide, you know, which constituent group was being invited to which party.

Laura Manley (EPN)

Okay. Perfect. Sarah-Emily, how did you all do it there?

Sarah-Emily Steinhardt

Well, so it's interesting. I love that concept of ,kind of, the demographic get-togethers. We typically, during our stewardship time, have a thank you dinner to all of our ministry leaders and our vestry, and our dean hosts that at her home. So that's obviously a targeted invite. It's just that group. We do, on our consecration Sunday, have a huge lunch after one service only.

Sarah-Emily Steinhardt

So the entire congregation knows that they are invited to that. So they see a lot of communication through email, on our website, also in print, like, when that letter or, you know, possibly a brochure goes home with the pledge card. We make sure everyone knows, you know, consecration Sunday. We call it Thanks-a-Lunch or Thanks-a-Brunch, depending on what we're serving. So everyone knows that they're invited to that.

Sarah-Emily Steinhardt

And side note, we've had some years where we've taken RSVPs for that, which has been extremely laborsome and just trying to track people down. And this year, we said, listen. We're gonna get the usual people that we get, the normal number. We'll plan for that. It'll be great.

Sarah-Emily Steinhardt

No one needs to RSVP. It was perfect. It was so great. We filled our event hall, Dean Willey Hall, like we normally do. It was wonderful.

Sarah-Emily Steinhardt

So if I could say anything, I would say less is more. Think of how you can simplify your program. People have so much coming at them that relationship approach, come to a party, come to an event, and less in the mail, less whatever is better. And if you have more things to share, maybe build an online resource on your website. Click here for, you know, the annual stewardship brochure or whatever.

Laura Manley (EPN)

Right. Now both of you and your answers, and I'm sure, Natalie, I know you had an individual, but I'm sure that there's a lot of involvement with the rector or the dean. What do you do if you don't have a rector or a dean? You're in the middle of a search, especially if it's an extended one. I know we went through one when I worked at Bethesda.

Laura Manley (EPN)

It took, we were in an eighteen to twenty month search there, and, you know, that can be difficult. What do you all do, and what do you recommend if you're in an extended search and you can't say from the rector or from the dean?

Catherine Beemer

I think, from the vestry, from the senior and junior warden. I mean, they are the de facto leaders at a time when there's not a rector or even well, that yeah. I'm a leave at that.

Natalie Aiken

Yeah. That's what I was gonna say. I just would recommend leaning into that. You know? I mean, everybody's aware that you don't have one.

Natalie Aiken

So I think you could use it as a time to, like, hear an update about what's going on, where we are with our search, or what we're thinking about in addition to how important it is to be a part of the annual campaign at this time of transition. You know? Mhmm. I think that's an easy message for a senior warden to carry, and I think most people would probably come to an event to hear about what's going on. I mean, it's a smaller space to be able to hear more and ask more questions and things like that.

George Belshaw

Yeah. When we went through a search, it was, like, five years ago or so now, similar. It was from the wardens, from the vestry, and we found the parish was pretty well engaged at that point, so they were paying attention. So I don't recall the stewardship. See, I was a junior warden then.

George Belshaw

I don't, the numbers stayed consistent. There wasn't a big up or down. So but so that was you know, people are kinda waiting, but they were engaged. They were giving. So we didn't see a drop off.

Sarah-Emily Steinhardt

Yeah. I'd echo that and say if you're in that situation, you're senior warden or if you have a strong stewardship campaign leader, whatever that title may be, you know, have it kind of come from them.

Laura Manley (EPN)

Mhmm. Good. And a lot of you have mentioned, like, kind of switching to that brochure model for your pledge cards. Or have any of you done the kind of the letter with, like, the perforated pledge card at the bottom? Because it's harder to lose an eight and a half by a sheet of paper than it is to, eight and a half by eleven. Have any of you done that, and what was the success of doing that model?

Sarah-Emily Steinhardt

We did that one last year Mhmm. For our 2025 campaign, and it was lovely. And by the way, I'm our communications minister. So I have my hands all over stewardship, but I am not my technical role is not a stewardship manager or any of that. I'm an Episcopal communicator.

Sarah-Emily Steinhardt

So it was neat to build that and see where that went, and it was not ineffective by any stretch, but we still found ourselves needing the normal pledge cards here. So we, like you know, our staff got together around the table, and we, like, tore off, you know,

a whole bunch of staff, more for the sanctuary space and other places. So I don't think there's any magic in that. This year, we did not do that. It was just a letter and separate pledge card.

Sarah-Emily Steinhardt

It was great, and we had extras here. Oh, and another little hot tip as a friendly communicator. We, this year, did one set of pledge cards from our official printer on, like, a better quality of paper, and we did just enough to pretty much get us through consecration Sunday. And then we've printed the rest here in house. We have a really good copy machine.

Sarah-Emily Steinhardt

We used a better quality paper. I don't think anyone's known the difference. It's been okay. So

George Belshaw

We have found pledge cards, fewer and fewer pledge cards, come into the office than it used to come in. So most of our, I was just trying to find it, but most of our giving comes in some electronic form, whether it's an online giving form we have on our website or just a simple email, which is fine. Most, I would say at least 50% of our pledges come in that way versus on a PewCard or a pledge card or what have you. And then we did one this year, we did have the pledge form perforated and part of an overall flyer, but we constantly decided not to include an envelope because that would have cost us twice as much the mail, you know, blah blah blah. And maybe that might have forced people to use electronic here, the QR code, that kind of thing.

George Belshaw

But, you know, we try things. And, of course, you got complaints with no envelope. But you gotta try different things. So keep experimenting.

Sarah-Emily Steinhardt

Yeah. Exactly.

George Belshaw

I did notice one question. Sorry. I learned to interrupt because I know we're getting close to the end here. Somebody asked, what about smaller churches? Because I think going around the room here, we're all kind of, you know, sizable parishes.

George Belshaw

Does anybody have any thoughts for smaller parishes versus larger parishes?

Catherine Beemer

Look. I'm gonna say I grew up in a small parish, and I think that everything we're talking about, you can scale. And the one thing that is constant is that you cannot do this work by yourself. So you have to have a partnership with the vestry or the rector or a lay committee for stewardship or combination of all of those. It is work that is meant to be shared.

Catherine Beemer

And, ultimately, you don't need a lot of paper products either. You can make pledge cards in your office using Publisher before it goes away in October or Canva or whatever and run them on a copy machine because, ultimately, what is gonna matter

are the conversations that you have with people in the pews and that the representatives talking about being generous to the church are are authentic.

Natalie Aiken

Mhmm.

Sarah-Emily Steinhardt

Well said. Mhmm. Yeah.

Laura Manley (EPN)

Very good. Alright. And I know we're coming up quick on time. So just a really quick, this is not gonna be a quick question, but a quick answer. And then we will be sharing names and emails with the panel.

Laura Manley (EPN)

So if maybe there's a question that didn't get answered, one of them can get back to you. But we're talking about the first sixty days, but we know stewardship's all year. So how do you handle, say, like, seasonal or balancing that whole you know, you have your regular stewardship campaign, but then you have a fundraising for a very specific thing, especially if that's a seasonal event, like you're asking for money for, like, a Christmas program or an outreach program or something like that. So what are some tricks and tools that you use for seasonal asks? George, I'm picking on you.

George Belshaw

Yeah. No. I'm thinking. We, in our case, our parish, everything we do is based on the annual appeal. Yeah.

George Belshaw

Whether it's outreach or pastoral care or the choir program or go down the list. Right? So we really, we tend to try to avoid nonannual appeal campaigns, except we are in a capital campaign right now. But, you know, giving to the annual appeal is not it's you are supporting outreach. Right?

George Belshaw

So that's part of our conversation with people. So we tend not to do a, we have occasional smaller thing like we have ministry in Cuba and things of that sort, but that's a very limited number of people. It's not a broad, tends not to be a broad, a broad ask.

Laura Manley (EPN)

Yeah. Alright. Well, I wanna respect everyone's time. We just hit 04:00. So, thank you all so much.

Laura Manley (EPN)

There are more questions. I will send you names and a copy of the transcript if any of you wanna get back to them or and to get back to participants or if you wanna share your emails, that's great too. If you have any resources in addition to that children's pledge card, let me know, and I'll share them. But thank you all so much. This has been amazing, and thank you to everyone who came.

Laura Manley (EPN)

The great questions. This is and and the comments and feedback between yourselves has been wonderful, so thank you for that. And we hope to see all of you

in Charlotte in March because the stewardship preconference and the smart starts are going to be fantastic. I'm gonna be sneaking into a few.

George Belshaw

We have two panelists right here. So come see Natalie and Catherine there.

Laura Manley (EPN)

Yeah. Absolutely. So you got a mini taste of the expertise that we have coming in.

Laura Manley (EPN)

So thank you all so much. I appreciate it. So thank you.

Catherine Beemer

Great fun. Thank you.

Laura Manley (EPN)

Thanks. Very much.

George Belshaw

Thanks, everybody. Bye.