Episcopal Parish Network
Where the Church Gathers

Summary and Transcript
Stewardship Beyond the Season: Engaging Your Congregation in Mission and Ministry
Originally presented October 6, 2026

Summary

The Episcopal Parish Network hosted Ali Williams, Jenny Lutter, and Drake Hoffman of ACS Technologies (Vanco), sponsors of EPN 2026. Drawing on the Church Stewardship and Giving Growth Guide, the session explored how parishes can approach stewardship as an ongoing invitation to participate in the life and mission of the church rather than a single fall campaign. Ali Williams walked through eight practices -- leading with mission, inviting meaningful participation, building a year-round rhythm, removing friction, discovering the story in giving data, framing financial giving, closing the loop with impact and gratitude, and choosing where to start -- and Drake Hoffman demonstrated how Realm's unified giving and accounting tools support those practices. Jenny Lutter shared exclusive EPN online giving pricing, and the panel answered questions on pledge campaigns, financial transparency, and messaging in challenging economic times. Attendees will receive the Stewardship Kit, including the guide, a checklist, and supporting handouts.

Key Takeaways

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1. **Lead with mission, not the need.** Whether the invitation is for volunteers or financial gifts, frame the request around who is impacted and what participation

makes possible rather than around the shortfall. When people understand the mission behind the need, they understand the role they play in advancing it.

2. **Treat stewardship as a year-round rhythm, not a season.** Balance invitations with inspiration, celebration, and gratitude so that participation becomes an ongoing relationship rather than a series of asks that people eventually stop hearing.
3. **Remove the friction between willingness and action.** Audit the pathways people actually use -- finding a volunteer opportunity, registering for an event, giving, especially on a phone -- and make each step simple, clear, and quick to complete.
4. **Let your giving data tell a story.** Move the conversation from totals to people by tracking first-time givers, recurring gifts, and changing patterns, and treat a drop in giving as a cue for a phone call or pastoral visit rather than another appeal letter.
5. **Close the loop and build trust through transparency.** Tell people what their time and generosity made possible, and share financial health regularly -- before there is a problem -- so that trust, generosity, and participation deepen together.

Transcript

Catherine Beemer: Well, hello everyone. Thanks for joining today. My name is Catherine Beemer. I'm the retired director of development for St. George's Church in Nashville, Tennessee, and currently co-chair of the planning committee for the EPN Conference 2027, where the church gathers. Happy to welcome you to the webinar. We are going to examine how church leaders can approach stewardship as an ongoing invitation to participate more fully in the life and mission of the church. We're so thankful you're here, and hope you'll take advantage of all the learning opportunities through EPN. All of the 2026 keynote recordings from the 2026 conference are available on our website. We encourage you to watch those and share, and then mark your calendars for EPN 2027 in Denver, February 23rd through the 26th. And registration will open, I think, next week. If next week is October 14th, then that's when it opens. So without further ado, I'm happy to introduce Ali Williams, who is the Senior Director of Marketing of ACS Technologies' Vanco, sponsors of EPN 2026. And she will get us started and introduce our other speakers for today. Thank you, Ali.

Ali Williams: Thanks, Catherine. I know that we're just thrilled to be here today with EPN. So we're so appreciative of the invitation. And today I'm joined by two of my colleagues, Jenny Lutter, who is our director of partnerships, as well as Drake Hoffman, who is our

sales manager. And so let's jump in. Let me get the presentation shared and I will guide us through. So today we are going to talk about our Church Stewardship and Giving Growth Guide. This is really about practical strategies for year-round engagement. And what I want to make sure that I say clearly today is this is not a pitch for a pledge campaign or anything like that. This is really just a really good conversation about how parishes like yours can make stewardship part of the ongoing life of the church and really doing that all year long. And so everything today that I'll cover comes from our Church Stewardship and Giving Growth Guide. And that is something that is part of our overall Stewardship Kit, which you all will receive access to after the webinar. And it's full of a lot of really great information that you can use as you move forward. So let's jump in.

So today what we are going to cover is really eight practices. When you get the guide, you'll see that the order of what we cover today is the same order as the guide. And so they really build on each other. It's really about mission first, and then participation, and then rhythm, exploring friction, data, where your financial giving fits, the impact, and then finally at the end, choosing where your parish starts, to take a look at everything. And so we know that many parishes know this kind of rhythm well. It's where you have the fall pledge campaign, you have the annual canvass, you have the budget presentation to do, you have your stewardship sermons. Moments like this really have value. And so instead of, when you're having these moments, starting with the idea of what does the church need from people, it's really starting with the idea of how can we help people participate in the mission and how do we get them feeling really inspired. And that doesn't mean that we stop talking about things like financial generosity or other things that are around stewardship, but we really want to lead with the idea of stewardship and the bigger idea of when people really embrace and understand the mission of the parish, the mission of the church, and they see the impact that it creates, and they see themselves as participants rather than bystanders or people who are observing, you see just stewardship really blossom. And so the five words that you see at the bottom of this slide are really the threads through the rest of the today. So we want to look at mission, participation, impact, data, and trust. And it's really all tying back to that question: how can we help people participate in the mission?

We also know that every church has ministries to staff, programs to fund, you have your facilities to maintain, your communities that you're serving, and those are all really real and present needs, and we want to make sure that your churches are able to communicate that. But when you're making a request of your audience, it's all about how you're framing that and how you are getting people motivated to be involved with what it

is that you're doing. And so look at two invitations that are here on the slide. When you are able to communicate and approach an ask or an invitation in the right way, you can see greater engagement and excitement about it. So for example, if you're running something and you say, We need 20 volunteers, please sign up. The need is really clear, but the purpose isn't. And so it's all about moving into purpose-driven, inspired mission. And so you could reframe, rework that invitation and say something like, We know that more families are attending, the children's ministry is growing, and additional volunteers are needed who will allow every child who walks to the doors to be welcomed, known, and supported. And so you can see the shift here. If you need 20 volunteers, the context makes the difference. And so here where we are asking 20 volunteers to help with children's ministry, when you make that really tied to impact and you have a compelling story and a way of asking that, people are more apt to get involved. And so that's a great way to start growing stewardship in the sense of people are giving their time, they're being involved and coming together as community.

So the same principle really applies to giving. And giving is just a small part of stewardship. So think about your next stewardship letter or a vestry budget presentation and really think about: does that lead with the shortfall or does it lead with the ministry? And when people understand the mission behind the need, they can really better understand the role that they're playing in advancing it. And so on the slide here, you can see there's really four questions. What are we trying to accomplish? Why does it matter? Who will be impacted? And how can someone help make that possible? So when you're thinking about stewardship and giving growth, it's not simply a better ask, it's really that stronger connection between mission, participation, impact, and trust.

And the other thing is helping people recognize what they have to offer. And so parishes often recognize and organize participation around positions to fill. So greeters, Sunday school teachers, the altar guild, committee members. And these roles all really matter, but they're only part of what people have to offer. And so when you think about the bigger picture, people have time, people have financial ways that they can help. You want to think about overall how do we allow people to help meaningfully? We know that for one person it could be financial resources, for another person, it's time. Someone could have professional expertise, they might have relationships that can have a greater connection for the parish to the community. There may be somebody who has a really wonderful ability to mentor or lead, someone who can pray consistently, someone who's simply showing up there to help in just any way that's needed. There's a wonderful variety of ways that people can help. And we find that a lot of times people don't always

recognize these things as stewardship because a lot of times we say stewardship and they think of just giving, but it's really more than that. And so when you're communicating your need and helping people understand about stewardship within your parish, help them understand the bigger story, their abilities, their experiences, their interests, their relationships, and then help them create clear pathways to put those gifts into action for your parish. And that is really a really big and complete stewardship invitation. And so it goes from here's what we need from you to here's how you can make a meaningful contribution in the way that works for you.

And so a lot of parishes, a lot of churches out there, they have stewardship seasons, and there's nothing wrong with that at all. Having that concentrated period of teaching, reflection, invitation can be really valuable. The challenge can come though when stewardship is really only concentrated to that particular season or that time of the year. We're seeing that if a parish talks about stewardship in October, for instance, and then goes silent for a year until the next fall, people will naturally associate that with the giving or annual campaign rather than an ongoing participation. And what we want to cultivate is that ongoing participation in the mission. And so when every communication that you're doing is an invitation, people will eventually stop listening. You want to balance invitations with the inspiration, the stories of impact, the celebration, the gratitude. And then that way that participation becomes more of an ongoing relationship rather than a series of asks. And so as you're seeing on the slide here, you want to move people from inspiring them, reconnecting the people to the mission, inviting them, giving them that clear and meaningful opportunity to participate. You want to celebrate with them, and then you want to thank them. And that's a really nice thing to build.

The other thing to make sure that you're focusing on is removing the friction from participation. And so imagine someone hears about a volunteer opportunity and they decide to help. What happens next? If you think through that for your own parish, you want to ask yourself things like: Can they easily find information on our website? Is there a clear point of contact or person to ask? Is the sign-up form simple? Is someone following up? Can they tell what will happen after they submit? Do they have a clear pathway to follow? And are there clear expectations? So the same questions for that can also be applied to the process of them joining a group with your parish, registering for an event, participating in a ministry, or giving. And so auditing that really helps reduce friction. And good stewardship includes reducing that friction between someone's desire to help and participate and their ability to actually do it and to act. So one challenge for anyone here today and anyone who will watch the replay: I want you to try each of these

six tasks yourself, ideally on a phone. And so when you get the kit and you get access to the kit later, this will all be mapped out in a checklist for you. But just think about that. If you were to put yourself in someone's shoes and find a volunteer opportunity, register for an event, follow that pathway – is there friction there? Are there points where it's a frustrating process to actually sign up, or is it clear? And that's a really great way to help empower your stewardship.

So I want to take a moment here and pause and focus on digital giving, because giving really deserves particular attention. We know that someone's decision to be generous can really happen in a moment. It can be a moment on the Sunday when they feel particularly inspired or moved by a message and they grab their phone and decide to give. If someone decides to give, how quickly can they act? So how is your giving set up at your parish? Can they easily find the giving page? Does it work well on their mobile device? Are the options understandable? Is it easy to set up recurring gifts? Do they receive confirmation that their gift was received? These are all things that you also want to be asking yourself. Technology can't create generosity, but it can help support it by removing that unnecessary friction. And we want to make it easier for people to be able to act quickly when they feel generous.

Vanco did a churchgoer giving study in 2025, and we found that digital givers, those who are using online, mobile, or app-based giving, they tend to give more consistently and they're more likely to cover things like the processing fees. And so that helps more of their gift go directly towards ministry. And overall, we know that the goal isn't to push everyone toward a particular method, but many Episcopal parishes still really see that value through the offering plate, and we want you to keep that, your offering plate, your envelopes, but we also want to help make it easy. If there are people who are ready to give digitally and support giving that way, we just want to help you make generosity easy to act on.

So another important thing is to discover the story in your data. Your giving data is really going to tell you more than just the total amount received. It's going to help you see a pattern over time, and that's going to help your leaders understand things like participation and ask more meaningful questions. And so some things that you want to consider with your data: Do you know how many households are giving? How many people are giving for the first time? How many have established recurring gifts? Are first-time givers continuing to give? Are occasional givers becoming more consistent? Are long-term givers remaining engaged? Are there meaningful changes in established

patterns? These are all questions – they are financial, but they're also ministry questions. So, how many could your parish answer today? Many treasurers and finance committees can report on the total, but we're finding that fewer can actually say how many households are giving for the first time or whether first-time givers continue. And these are all questions that really move the conversation from the budget to the people. And again, that's a small part of the overall stewardship picture.

And as you're looking at your data, you want to try to uncover what a pattern is going to mean. You want to be able to have some insights around that. And so this is where data and pastoral care will meet. So a drop in giving, it could be a job loss, it could be an illness, it could be someone's moved away, it could be a season of grief. And so that calls for a phone call or a pastoral visit, not just simply them getting another appeal letter. Just keeping your finger on the pulse through data will really help your clergy, your lay leaders notice, and help to really keep those relationships personal and help people feel cared for. And so the goal isn't with data simply to know about people, it's to know the information and use that information responsibly to be able to serve people and ministry more thoughtfully.

And so once you have the big picture of stewardship and you have that really broad view of stewardship, you're able to then come in with a clearer conversation about financial giving. Helping people feel engaged, helping people feel tied to mission and having purpose is really key before you have those conversations about giving. You don't want it to be just about talking about money. There needs to be a natural relationship that's built, a sequence that occurs, and then you can have a healthier conversation about giving. So you never want to lead with how can we get people to give more. It's really how can we help people understand what their generosity makes possible and what makes it easier for them to participate in that. So order of conversation really does matter with that.

So, the six levers of giving growth: for someone who's never given, we see that the most meaningful next step could be that first gift. And some people give occasionally because that's how they've always approached generosity. They give maybe a few times a year, Easter, Christmas, things like that. Some people just don't know that recurring giving is an option that exists. And so with all of these things, you want to keep those in mind. And as a bridge to that, we know that retention matters as much as new givers. So retaining people in your church is really important. And so if you're able to see those changes in giving patterns, you should look deeper and see, okay, is there a retention issue here? Is somebody at risk? Do we need to check on them and make sure that we're helping them

feel cared for? And so we just feel like if you can help more people begin giving in a way that is based on relationship, something that feels really natural, then you can really strengthen their giving and their retention and strengthen trust with them.

And so we also know that financial communication shouldn't happen only when your church is behind budget. Regular communication about financial health, your ministry priorities, and the impact that's being made really helps people understand how the church stewards what's entrusted to it. And so for many parishes, that can be as simple as a short quarterly note from the treasurer, a one-page narrative budget at the annual meeting, just any way that you can share things before there's a problem. And so looking at where your resources are going, why particular priorities matter, what ministry those resources support, what's been accomplished, and then where there may be any challenges or opportunities, that's a really good way to have a conversation with people. So we see that when churches demonstrate responsible stewardship, they strengthen trust. And then when people can see the impact, you're closing an important part of that stewardship loop.

So, closing the loop. We know that an invitation shouldn't be the end of the stewardship conversation. They should know what happened. So if they gave hundreds of hours of their time to a ministry, if they were volunteering, tell them what was accomplished in that time. If they rallied around a community that had a particular need, share the result. If people contributed some sort of expertise or relationship building or resources or through financial support to launch something or make an impact, just really show them what happened next. And you have a lot of opportunities to do that. So it could be bringing in a family that was impacted through ministry support. It could be one of your ministry leaders explaining what happened. It could be a short update that's celebrating a milestone, photos or videos that are showing some sort of project become reality, a financial update, or a simple thank you. That all matters. And so not every story needs to end with another request. It can simply be closing that loop and saying, look at what you did. Look at what you helped make possible. And that makes people feel really good, because people want to feel like what they're doing matters.

So Vanco has always historically really leaned into storytelling and making storytelling just a regular rhythm in churches and parishes. And so we want to make sure that you can take stories and use that framework to turn your data and your abstract numbers into a really tangible ministry. And so over time, this does support that stewardship feedback loop. People will understand your mission. They'll see an opportunity, they'll participate,

they'll see the impact, they'll deepen their connection, they'll feel trust, and then that helps bring them back around again. And so there are all kinds of natural storytelling moments in the year, Advent, Lent, Easter, Pentecost, not just in the fall. And so we want to make people feel like they're accomplishing something together with your parish.

And then just really quickly, just touching on during the year when you do have times in the season where you want to have giving growth and you want to communicate that. We know that giving growth rarely comes from one tactic. So you could start by asking, what is the biggest barrier to stronger giving participation at our church or parish today? And so there may be areas as you're going through, as you're using the kit that we're going to give you and the checklist, that you can go through financially auditing what, where may there be gaps that we can fill in and help people understand their giving participation. And so one thing is we know maybe sometimes they don't understand the impact of their gifts, maybe they don't understand that recurring giving exists or how to set that up, and maybe they just need a little bit more financial communication. So there's all things that you can think about and help build towards so that you can ensure you have some sustainable giving growth with the church.

And so another piece is campaigns. And so we know that, like I said, generosity, financial generosity is really an important part of the picture, but it sits within something larger. And so stewardship really is about relationship and connection to mission. And when you're inspiring people with mission, when you're inviting them to participate, when you're celebrating what they accomplish and expressing genuine gratitude to them, stewardship becomes part of that ongoing life of your parish. And so when you repeat these six practices consistently, you will see your engagement be strengthened, you will deepen your generosity, you'll help more people realize the meaningful role that they play in advancing the mission of your parish. And all in all, stewardship, it doesn't have to be something that your parish talks about once a year. It really can be a year-long rhythm. And so healthy stewardship isn't defined just by one successful campaign. It's really that ongoing effort helping it feel very natural within your parish and the consistency that comes. The goal is not for you to stop asking. It's to make sure that the ask, whatever it is, whether it's giving, whether it's participation, is built upon a larger relationship. And small changes really do make a difference. So as you can see on the slide here, there's a couple things you can do: make one step easier in the process, whether it's how they sign up for something, how they give, reducing that friction; telling one story that demonstrates impact, helping people feel really excited about the things that are happening and for them to see the tangible results; thanking people without asking for

something in return; sharing financial information before there's a problem; helping someone recognize a way that they can contribute. And then it's also looking at your giving data and asking a better question and really diving into the insights. And all of those together really help support and drive solid stewardship.

And so as I've mentioned, you will be getting a kit. We know that understanding healthy stewardship is really the first step as you're growing and engaging within your parish. And so we want to give you a kit to help you identify where your church is today and then decide what you want to work on to improve. And so the kit will include a guide, a checklist, and then some other handouts that will help you do a number of things. It'll help you assess your church's stewardship health. It'll help you build a year-round communication rhythm. It'll help you identify friction in giving and participation. It'll help you create clearer opportunities to participate. It will also help you choose and outline practical priorities for 90 days. And then it will help you strengthen how you communicate impact and appreciation. So all in all, we recommend start with one area, make one really meaningful improvement, and then build from there. And so I'm going to hand it over to Drake. And he is going to walk you through some information about how you can create that connection within your church using Realm.

Drake Hoffman: Yeah, thank you, Ali, and thank you for being with us this afternoon. And so everything Ali talked about today comes back to an idea. Stewardship isn't a season, it's a rhythm. It's inspiring, it's inviting, it's celebrating, it's thanking all year long. And honestly, most of the parishes that we work with already believe that. And what gets in the way usually isn't conviction, it's the capacity. And so it's the treasurer entering checks into one system and online gifts into another. It's the parish administrator rebuilding the same spreadsheet before every vestry meeting. It's the rector who wants to thank a first-time giver but never finds out that gift ever happened. So for the next few minutes, I want to show you how Realm can help a parish carry this rhythm without adding more work to the people already carrying the most. Next slide, Ali.

So Realm is one place where clergy, staff, lay leaders, and the congregation all work from the same information. And it rests on three things: your ministries, tools, and services. And so within ministries, it equips your staff and your lay leaders across every area of parish life, stewardship included. And the tools that it provides – giving, accounting, communication, groups, volunteers – are integrated and not stitched together or siloed out. And then services. We don't just hand you a software and you're left alone. There's training, guidance, and real people to call. And if you look at this row at the bottom, those

little pills, you'll see it maps almost exactly to the stewardship guide. Removing friction is giving in the mobile app. Discovering the story in your data, that's the dashboards and reporting in Realm. Closing the loop with impact is your communications and the methods that you can communicate through Realm. Helping people recognize what they have to offer, that's the groups inside of Realm, volunteer management, and the profiles. And then building trust through transparency is the accounting platform. And that's not a coincidence. These practices work best when the tools behind them share the same information. So I'll show you two places where that matters most. Next slide, Ali.

And if you remember from the exercise Ali was talking about earlier, way back in section four, removing friction – try making a gift from your phone the way a parishioner would. This is where that becomes easy. QR codes and direct links. Each giving form gets one link and one QR code. Put it in the bulletin, on the screen, in the canvass letter, or on the door of the parish hall. The details treasurers appreciate the most, too. If you change the form later, the QR code doesn't change, so you never reprint materials. Online and text giving: card, bank transfers, simple text keywords, one-time and recurring. And that matters because of the research Ali shared earlier – digital givers tend to give more consistently. They span every age group, not just younger members. Recurring giving is also one of the gentlest ways you can help build an occasional giver, help them to build consistency. And then over here on the right, cash and check batches. A lot of parishes still have a large share of gifts in the plate and that's wonderful. Your counters can enter, scan checks, and Realm matches each gift to the right household automatically. The headline is at the top of the slide: every gift, however it was given, lands in one giving history. Nobody rekeys anything. And that's what makes discovering the story in your data, Ali talked about in section five, possible. You can't see first-time givers, lapsed givers, or changing patterns if the plate is in one spreadsheet and online giving is in another. One history is what lets your rector say thank you to someone who just made a first gift or check in pastorally when a long-time pattern changes. Next slide, Ali.

And more recently, in section six, you'll remember it ended on trust through transparency. People keep giving when they can see where their generosity goes. For most parishes, that trust can live or die with the treasurer in the vestry. We have true fund accounting. A lot of parishes don't operate on a single checking account. You have many different funds. You have the operating fund, you've got the outreach, memorials, the building fund, and maybe even a discretionary fund. In Realm, when your counters post a batch of gifts, it flows straight into the general ledger as a deposit to the right fund. Nobody has to re-enter anything. With bills and reconciliation, you can track invoices, you can set up

recurring payments, you can print checks, reconcile accounts, and that's all in the same system that's holding the giving. And then you can build the budget by fund, share clear reports with your vestry and finance committees. And this may be music to a lot of people's ears, but no more rebuilding the spreadsheet the night before the meeting. And here's why that matters for stewardship and not just bookkeeping. Section six asks you to share financial information before there's a problem. Where are the resources going? What do they support and what's been accomplished? That's hard when giving and accounting live in separate systems that just don't quite match. When they're one system, transparency really stops being a project and it's just a report. And that's the full loop Ali was talking about. A parishioner gives easily, the gift is recorded once, it posts to the right fund, and leaders can show the congregation what their generosity made possible. And because of this partnership, it's about making these practices accessible to every parish. The Episcopal Parish Network and ACS Technologies have some exclusive giving pricing, and I wanted to invite Jenny Lutter to share with you those options.

Jenny Lutter: Yeah, thank you, Drake. Thank you for showing the practical ways we can put what Ali taught us into practice. I manage a partnership with EPN, and it is a great privilege of mine. And if you're coming to EPN in Denver in February, please stop by and say hello. I would love to meet you all. So we have established this pricing because of this partnership. So not only are we offering these great tools, but we also have some savings available to you. These are two different online giving pricing plans. And the reason we offer two is because not everything fits every church, right? So for smaller churches, they tend to gravitate towards the Preferred Start pricing. The reason is that extra low monthly fee, just really wanting to keep that monthly fee low. Most churches that have $75,000 or less in annual online giving, that's what they would choose. Over 75, then you tend to want to go to Sustain, where you take a little higher monthly fee in exchange for some lower rates, because with your giving being higher, then that savings then makes that worthwhile. So again, these are exclusive to Episcopal churches because of our great partnership with EPN, and just makes all of this putting this into practice a little more affordable. And that's what we want to help you do.

Ali Williams: Well, thank you, Jenny. We have come to the end of our presentation today. We just again want to thank the Episcopal Parish Network for welcoming us today to come and talk to you. And we will make sure that everybody who attends gets a copy of our kit that we talked about today. I do want to open the floor for questions. Jenny, I know you've been watching the chat. If there's anything that you want to call out for me, we can answer them or wrap up.

Jenny Lutter: Yeah. Absolutely. Yes. And I just also want to acknowledge Aaron just wrote something about accounting, and there is Realm accounting, as many of you are aware. Thank you for calling it best in class. We agree. We tie the education to those opportunities for what we offer the market. So one question that came in is from Catherine – for pledge campaigns, and they're important for budgeting, which is absolutely true – you know, you want to be able to see what's coming in in the next year – how do we help those digital givers get into the habit of making a planned financial commitment? I have a couple things to say and then I'll pass it over back to Ali for anything to add. Really, when she touched on this, the recurring giving: to encourage your donors to set up recurring giving, but then don't let it end there, because it's very easy for recurring giving – so you set it and forget it, which is beautiful, you can count on it, right. But then to get people to then reassess and look at what they might be giving, pledging for the next year, you want to give them a moment, give them something to respond to, in order to really re up or to change whatever that recurring gift is. So continue with your pledge form, but connect that with the giving that's recurring. So not only do they commit, but they also set up the giving so that it is a regular and consistent, predictable gift. Anything else to add, Ali?

Ali Williams: No, I think that makes a lot of sense, Jenny. And I will say that within the kit that everybody is gonna get – super excited because it has a lot of great ideas for those things, for communication, for having those conversations, and even some sample language and templates that you can grab for recurring givers, getting that set up. So that will be very helpful to utilize.

Jenny Lutter: Thank you. And then one more: would it be helpful to regularly inform the congregation about the state of your church finances?

Ali Williams: I personally – I mean, I can speak up, and then if Drake or Jenny, you guys have your own perspective on it. I know that with my church, that's a practice that they've just started doing more, having more frequent communication or updates. They've sort of earmarked different times within the quarter to kind of designate a Sunday or a time to have that conversation with the congregation, and it's very helpful, right? It helps really have that transparency be there. But then also you do find that if people aren't aware, then they aren't aware, and people do want to help. People do want to increase their giving or increase their time or just whatever it is that you need. But especially with that financial transparency, people respond very well to that. So I do recommend having a regular rhythm of that.

Jenny Lutter: Yeah. I agree. And I think it really – like you said, Ali, when you can connect it by a story, what your budget need is. If you can translate the heating bill – which I know no one gets excited about how their offering is gonna go to utilities – but when you think about who fills that building, maybe you have community groups that meet inside the building, and you can talk about how the general offering and where you're at financially covers those very important things that are at the heart of your church, that's really important. So transparency, I see that as very important. My husband's a pastor, and our fear when we paid off a mortgage at a church we were at recently was that people would stop giving because they didn't see the need. People, we're human, right? And that need in front of us is important to see.

Ali Williams: Yeah. And you will find much more than what we were able to cover today in the kit. I'm really excited for everyone to get that guide and to get the checklist. So lots of really helpful information there. But again, thank you to the EPN for inviting us today. We're just thrilled to be here and we thank you for your time, and we will have much more to share. Jennifer said she had a question about giving in hard economic times. Let me just scroll back up and take a look. Yeah, Jennifer, you said in these challenging financial times, what messaging would you recommend or find works well for pledge campaigns? That's a really great question. And I know that can feel a little bit – yeah, we all, you know, every church, every parish kind of has that question at one point. I would say it's okay to acknowledge the hardship first. You can say things like, We know that many households are feeling stretched this year. We're feeling it as a parish too. I think it's okay to just acknowledge that. I would say in your communication, lead with your message and not necessarily the shortfall. So one example could be, We see more neighbors coming to our food pantry, more than ever right now. And your pledge will help keep the doors open for them or help support them. I would be really transparent about the numbers. So I would share that picture just very plainly, without panic, but just stating the fact: here's where we are, here's what we're asking for.

And then I would make every gift feel really welcome. And so you don't necessarily have to go out and push for really big numbers, but I think just saying whatever you can offer, even if it's less than what you gave last year or whatever, that still matters. The whole point is to help them feel okay with however they're participating. So I would really emphasize the participation and not just dollars, and then really follow that up with impact and gratitude and obviously making it very frictionless for them to follow through on that process and give, whether it's digitally or not, or setting up recurring giving. And so at the end I would really put in some sort of message about hope. So there are tough

times, but I think that's a really good chance to remind them and strengthen that relationship that your parish is a community that really carries each other, and not only in crisis, right? We are a community that is always here for each other. And I think following those tips would help package that message and help it land in a way that really resonates. And we'll have tips for that in the kit as well. So I hope that makes sense, Jennifer.

Jenny Lutter: And then we have one more from Scott. He says, during the course of a year it's not uncommon for the church to incur significant unexpected expenses. How should they be communicated to the congregation in terms of additional giving? I think it comes back to transparency again. They have to be in the know and the impact on the mission. And in this case, sometimes, if it's okay within your congregation, individual asks might be critical, and then to those that you know can give and want those extra opportunities for generosity. But I just think transparency comes right back to it. Communicate, start with mission, and be honest about what this means.

Ali Williams: Yeah. My church recently went through that, and they had a very transparent conversation one Sunday. They carved out what would be normally their service time. They just designated that as, hey, we have to give the church an update. This is our situation. This is the unexpected expense that we're trying to solve for. This is what we need as a number in order to get to where we need to be to overcome that, and we welcome your help and support. And that message, people really appreciated it. People appreciated the transparency, and without making it again be something that seemed like panic or crisis, it was just we're all having a conversation together. And so people felt really happy and willing to step in, support, help fill that financial gap. And because of that, now they're communicating regularly on updates, financial updates: here's where we were, here's how we're moving along, here's where we're close to where we need to be. And so people appreciate that.

Great. I think that's everything. Well again, thank you everybody. We really appreciate your time, and you'll get a copy of the recording as well as our kit. And we look forward to seeing you again. Thanks everybody.

Jenny Lutter: Thank you.