

## 3E Stewardship – Phases 1 and 2 – 2017 through 2022

### 3E Stewardship by the Numbers:

Two 3E grant phases; 6 years (7.5 to completion); 6 different Stewardship programmatic offerings

182 Rocky Mountain Synod congregations signed up one or more times to participate in 6 different Stewardship programs offered in partnership with GSB Fundraising over the six years to date, plus another 1.5 years through April 2024. Stewardship for All Season (SAS) Year 1 was the only program offered in Phase 1. In Phase 2, 5 new programs were offered in addition to SAS Year 1.

#### PHASE 1: May 2017-April 2020

- PHASE 1
  - SAS Year 1: 55 congregations signed up in 3 Cohorts in 3 years 2017-2019

Cohort 1: 13 reporting SAS congregations 2017-2018

- Appeal Results: 24.9% increase in dollars
- Appeal Results: 35.26% increase in intent commitments (pledges)
- Mission Giving: 9% increase in dollars

Cohort 2: 16 reporting SAS congregations 2018-2019

- Appeal Results: 56.31% increase in dollars
- Appeal Results: 38.79% increase in intent commitments (pledges)
- Mission Giving: 26% increase in dollars

Cohort 3: 14 reporting congregations

- Appeal Results: \$188,782 increase in dollars (note: reported in \$, not %)
- Appeal Results: 26% increase in intent commitments (pledges)
- Mission Giving: 9% increase in dollars

#### PHASE 2: May 2020-April 2023

- PHASE 2
  - SAS Years 1 and 2: 28 RMS congregations in 3 years 2020-2022
  - Beginning a Culture of Generosity (BCG) 21 RMS congregations in 3 years 2020-2022
  - SAS Refresher: RMS 24 congregations in 2 years 2020-2021
  - Center for Generosity and Generosity Watch Parties: 40 RMS congregations represented in 1 year 2022
  - SAS Years 1 or 2: 14 congregations have been invited to sign up for 2023-24
  - SUSTAINABILITY BONUS: All RMS and Grand Canyon Synod (GCS congregations are invited and able to access the Center for Generosity in 2023 through April 2024

3E Stewardship in Phase 2 added a second year to SAS, several new programs in response to the Covid Pandemic challenges and brought in the Grand Canyon Synod as part of the grant participating in SAS Years 1 and 2 and BCG.

As with most reactions in the pandemic years of 2020 and 2021, congregations were reluctant to embark on new ventures, especially those that required time and resources. Stewardship for All Seasons was one of those that had previously been conducted primarily in person over a full year and with deep commitment of both clergy and lay leaders. As a result, Cohorts 4 and 5 were small in the number of congregations participating in SAS, 15 total with 10 of the group Year 2. 3E Stewardship and GSB pivoted as noted in program descriptions below to offer programs online, significantly shorter in length, and supportive to previous SAS congregations and more manageable to congregations that had not yet participated.

Beginning a Culture of Generosity (BCG) 2020 was a big, encouraging surprise to 3E and GSB, with 22 congregations from RMS and GCS participating. In its inaugural year:

- 36% reported expected dollar increases over 10% (one RMS reported 31%)
- 18% reported expected dollar increases between 5-9%
- 27% reported expected dollar increase up to 5%

[Note: The 3E Stewardship Phase 2 results for the Grand Canyon Synod are not otherwise noted in this document. Their stories and results mirror the RMS, and GCS has increased their investment and plan to continue these programs beyond the Lilly Grant investment.]

What we discovered is that continuing to build on generosity principles and SAS teachings during the pandemic years was not only successful for those involved, (see example below), but a welcome lifeline for what to do in scary, uncharted waters. In other words, don't abandon ship. Generosity is a culture, not a one and done part-time endeavor.

SAS Year 1 congregation reported:

- Appeal Results: \$48,440 increase in pledged dollars
- Appeal Results: 36 increases new commitments (pledges) – 25 were first time pledges
- Mission Giving: 18% increase in dollars given

There's a hidden generosity story in here, too. What is not apparent in the reported results in this SAS congregation, is that it does not say that this is for 2020, the most dramatic, radically changing pandemic year. Nor does it say that the congregation was not meeting in person, nor that that they were a congregation in transition. And the real missing number is: How did the worshipping community number change for them that year? Some congregations lost nearly half.

Here's a key comment relevant to increased generosity and declining worshipping members from a SAS Year 2 congregation (also in transition):

*Though our congregation has lost a lot of members since the start of the pandemic and we had something like 20% fewer giving units this year than last year, we still maintained our pledged budget at nearly the same level as before. ~ Survey Response 2022*

RMS Cohort 6 SAS Years 1 and 2 and BCG results are still coming as of the writing of this report January 20, 2023. But we're hearing recovery stories and a feeling of getting back-on-track. Some early survey responses:

*SAS Year 1: Bethel's net revenue increase over the previous year's total revenue is expected to be \$100K due to implementing the SAS program. Fifty-five donors will increase their giving next year with only 13 donors decreasing their giving. Bethel's 2023 budget will show an increase of 3.3% giving towards the Rocky Mountain Synods mission support over last year's giving. ~ Survey Response 2022*

*SAS Year 1: Our largest giver (likely accounting for >10% of our total giving in 2022) stepped back in a big way this year. In fact, he had been fiercely resistant to our engagement with this program, as he did not embrace the idea that giving should be celebrated and highlighted, with particular opposition to any pastoral involvement - so his decrease is not unrelated to this program. However, in spite of this large donor's huge reduction in giving, our overall giving decreased by less than 2.5% this year. We are now in a position where we can fully expect to have a larger budget next year than last year with far more balance accountability and breadth of congregational participation - after only a very mild disruption during this one year. SAS will help us have a much healthier sharing of financial generosity with less dependence on one dominant voice. ~ Survey Response 2022*

*SAS Year 2: We set a goal for next year's budget that included a 7.5% increase from the previous year, but we did not think our pledges would allow us to increase the entire amount. We expected to shave some from the ministry initiatives. To our surprise, we not only received a far higher pledge amount for 2023 than ever before, we also received more offerings for 2022 than expected, with a very large positive balance to end the year. ~ Pr. Joel Pancoast, Zion, Loveland 2022*

Survey response ratings over time for all 3E Stewardship programs:

3E has taken surveys of all programs over the past six years. We ask congregations to rate the programs on a scale of 1-5 (5 is best) on effective principles, impact and culture change predictions. Each time, each program was rated overwhelmingly 4 or 5 (>90%). Whether a congregation engaged for the first time or the fifth, they shared rave reviews of the presentations, the consultants, the value, the importance and gratitude to the RMS and the Lilly Grant for the opportunity to participate shifting from old stewardship ideas to learning and applying principles of generosity and abundance in giving practices.

*These programs, and their presenters, really resonate with what's important and where our focus should be in developing a culture of generosity. ~ Randy Cunningham, Atonement, Lakewood, CO 2022*

*SAS, Refresher & Generosity Watch Parties have been awesome with much useable information shared. The sessions have been informative & instructive. ~ Joan Mahoney, Prince of Peace, Logan, UT 2022*

*I want to take this opportunity to say how pleased and blessed we have been at St. Luke to be a part of the Stewardship for All Seasons programs. This will be our fourth year entering into SAS and we've had 3 great successful appeals to this point. It has allowed us to do some amazing things, and especially in the midst of the pandemic we were still able to increase our giving which allowed us to really reach out beyond our walls. ~ Tom Bernardinelli, St. Luke, Albuquerque*

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### 3E Stewardship Program Descriptions:

Stewardship for All Seasons Years 1 and 2: Congregation stewardship teams learn tried and true basic principles and effective methodologies to carry out productive stewardship programs. They embark on year-round, on-going stewardship resulting in more money for ministry, becoming more energized stewards, and building a culture of generosity.

Beginning a Culture of Generosity: BCG is a six session “SAS lite” to help RMS congregations conduct a fall appeal and be introduced to key generosity messages embedded in gratitude, storytelling and best practices. It was developed as a response to helping congregations in the pandemic, where the uncertainty and ability of congregations to engage in a year-long program was too daunting. BCG is now conducted nationally by GSB Fundraising across Christian denominations and is sponsored by the ELCA for ELCA congregations. GSB completed its first national cohort in Spanish based on a 3E initiative and primary engagement in the Grand Canyon Synod.

SAS Refresher: The Refresher was also developed in response to the pandemic as an offering to RMS Phase 1 congregations to help them adapt their fall appeals to issues around the pandemic and to support their on-going efforts to build a generosity culture.

Center for Generosity: CFG is an online resource of videos, podcasts, Zoom webinars and office time with consultants. One hundred access seats were made available to the RMS by GSB Fundraising to provide on-your-own-time resources and on-going support to further enhance access and support to generosity building methods and tools.

Generosity Watch Parties: The Watch Parties were envisioned as a way to engage more individuals/congregations into the Generosity conversation and refresh or introduce key concepts of a generosity culture. We also expanded the presenters to include RMS staff, pastors, lay leaders, Bishop Gonia, additional GSB consultants, and the director of the Lilly Grant Initiative, Rev. Rick Foss. The topics included: Governance, Storytelling, Generosity and the Budget, Practicing Gratitude, Not Stewardship in a Box, and Abundance Mindset. All Zoom sessions were followed up with access to curated materials from the Center for Generosity.

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Cultures are not just programs. They are nurtured and built in additional ways by establishing shared stories, understandings, insights, learnings – building relationships with trusted leaders. ~ author unknown

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### 3E Stewardship by Its Charter, Goals and Impact:

The name of the Lilly Grant in the Rocky Mountain Synod is Educate, Equip, Enact or 3E. In the course of six years and soon to expand to almost 8 for 3E Stewardship, we have worked to define these three E's and provide opportunities throughout the synod for all congregations to find ways to participate.

To **EDUCATE**, we found a sound and successful curriculum in Stewardship for All Seasons, designed and adapted for the RMS by GSB Fundraising. In the years of adapting this curriculum, 3E was able to request significant changes to address the challenges of the Covid pandemic and to expand ways of delivering the curriculum. What began as a one-year program has expanded into one or multiple sessions on specific topics, 6+ month introductory and refresher courses, and now SAS as a two-year in-depth development program in fundraising, communication and organizational vitality centered on a culture of gratitude, generosity and abundance.

#### What the participants say:

*Development of stewardship initiatives, structured step by step process, professional materials, and follow-up led us to a successful campaign even with the pandemic. Paul and Evan's experience, guidance, and encouragement through the process was invaluable to our success. They were always available during the process to answer our questions when they arose whether during meetings or when off-line. We now have a program structure to continue using and to build and improve on as we go forward. ~ Survey Response 2021*

*The congregation has been turned in on itself in a time of anxiety. This program brought them into partnership with others and gave them the stability of a guide and coach...a first step towards growth. ~ Survey Response 2020*

*I want to say how much I appreciate that this "beginner" program was made available to us during this bizarre year - it has certainly made a great impact on our congregation's view of generosity. ~ Survey Response 2020*

To **EQUIP** is to provide congregations with what is necessary for the purpose of building a long-term understanding of and encouraging generous giving. For so many congregations following their 3E Stewardship experience, they expressed that actual change had happened. And more importantly that these changes were the beginning, not a one-and-done experience, but a path they can follow for the future.

#### What the participants say:

*SAS allowed us to talk openly about giving, challenge long-held beliefs about giving and pledging, and introduce new ideas about what God calls us to do. ~ Survey Response 2019*

*We experienced a 20% increase in expected giving for 2021, far more than we anticipated. In large part, this was due to our participation in SAS, but it also was assisted, in a roundabout way, by the pandemic. We already had a way to give online but no one had used it. Since the pandemic started, we have gone*

*from two families giving a recurring gift online to NINE families now. Most made an increase in their giving when they signed up. This was also promoted by the SAS program, for us to take advantage of it, and they did. It stabilizes our giving and accounts for about half of the increase in expected giving for this year, which is pretty amazing. ~ Pr. Dan Tisdell, St. Mark's, Roswell, NM 2019*

*SAS gave our congregation focus areas for our generosity. Instead of it being the "what we've done before" ..., members could relate to the fact that our generosity culminated in both "giving to the budget" and giving to a need in our community at large. We are excited to get our teams up and running this spring to begin thinking ahead to what our next focus will be for 2021. The biggest impact besides giving members a clear focus, was that the process was much easier than it has been in other years. The GSB guidance and the timelines kept us on track. ~ Survey Response 2021*

*Focus on generosity. Commitment to a year-long program. Mission initiatives gave us local homegrown commitment for the congregation. Goals are reachable, practical and exciting. ~ Survey Response 2019*

**To ENACT is to execute and to achieve. For learning and acceptance to keep moving forward in new ways, congregations are asked to actually do, not just learn and to find success in their efforts to realize that they have the tools and methods to keep going, keep building, keep changing culture toward generosity and abundance thinking.**

What the participants say:

*Since this was the first year following the SAS program, it helped start a new stewardship culture within Bethel Lutheran. Bethel had not been doing statement of intents in the past and we (stewardship committee) were not sure how positive the council or congregation would react to this different approach. But following the SAS program with the brochure and bulletin inserts it was all received very positively and with a great response. ~ Survey Response 2022*

*This is the third congregation in which we've drawn upon the resources and methodology of SAS & GSB with excellent results. It's helpful for the members of the SAS team in a congregation to KNOW that GSB, through its multi-years' work with non-profit organization, gives excellent advice, to the tune of \$1B of results ~ Pr. Gene Zeller, UT, NM, CO parishes 2017-2020*

*Development of stewardship initiatives, structured step by step process, professional materials, and follow-up led us to a successful campaign even with the pandemic. Paul and Evan's experience, guidance, and encouragement through the process was invaluable to our success. They were always available during the process to answer our questions when they arose whether during meetings or when off-line. We now have a program structure to continue using and to build and improve on as we go forward. ~ Survey Response 2021*

*Helped us begin to develop a true spirit of generosity that we can maintain long term.  
~ Survey Response 2019*

Respectfully submitted January 20, 2022,  
Debra Elstad, 3E Associate Director for Stewardship