

Broadmoor  
United Methodist Church  
Baton Rouge, Louisiana

Stewardship Discovery

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**Stewardship Discovery, a Stewardship Ministry Audit  
Report to the Pastors and Church Leaders  
Broadmoor United Methodist Church; Baton Rouge, Louisiana**

Horizons Stewardship (Horizons) conducted a Stewardship Discovery stewardship ministry audit for Broadmoor United Methodist Church (BUMC) in Baton Rouge, Louisiana to assist the church in gaining a clearer picture of its current stewardship practices and to give the church concrete prescriptions specifically geared to increase generosity among those who attend the church.

The study was conducted by researching significant amounts of historical data provided by the church, a focus meeting with the pastor and executive staff, meetings with several groups within the church (church leadership, missions/ worship/spiritual formation teams) and with staff overseeing finance and communications.

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Philanthropy in America in the 21st century is highly competitive. With over 1.5 million non-profits and churches, survival of the fittest is borne out time and time again. Today's donors are selective and very questioning of charities and churches alike in determining where their dollars should go. Today's church must not only seek to develop a giver out of a non-giver, but become the preference for gifts from those already inclined to give. Churches that do both will thrive. Those that do not will find themselves increasingly cut out of the philanthropy pie.

George Barna, America's premier church researcher, commented in his report on Christian financial stewardship that, "once a church establishes itself as being trustworthy in people's minds, it will raise a minimal amount of money from attenders. However, to significantly increase people's willingness to give generously, a church must speak to the issues that get people excited. The leader, first and foremost, must present a compelling vision for the ministry – not simply keeping the doors open and the programs running, but a clear and energizing goal that describes how lives will be transformed by the church if people contribute their time, money and skills. Related to that vision," Barna continued, "the church must then impress potential donors with its ability to minister in ways that are efficient, effective, satisfying urgent needs, providing personal benefits, and incorporating donors into the heart of the effort to bring about serious life-change. Most donors give a modest sum of money out of habit, guilt or hope, but are not moved to share or sacrifice in a bigger way because they do not sense that the church is revolutionizing the community."

In speaking to the topic of generosity, Barna went on to say, "continuing to raise funds the same way they always do – generic pledging campaigns (and) talking about people's responsibility for funding the operations and programs of the

church – will simply generate the same lukewarm response from congregants. The availability of funds and the willingness to invest in meaningful ministry does not automatically lead to increased giving by churched people. It's a highly competitive market for funds, with more than one million non-profit organizations vying for donor dollars. The organizations that score big are those that understand why they exist and how to motivate donors to get on-board with distinctive and impactful activity that stimulates people to give beyond the normal one or two percent that is given without much thought or sacrifice.”

Successful churches are clear on their God-given mission of changing lives; they know why they exist and how to communicate their vision in on-going ways that inspires members to participate in what God is doing through the church. Churches that are effective in growing generosity within its members understand that stewardship is much bigger than conducting an annual campaign. Indeed this effort must be reflected in how/what they communicate, how they cast vision and share stories and in the ways they encourage people to grow in their Christian walk and discipleship.

When the vision is present and being communicated, people must be in worship to hear it. In our experience, one of the most effective strategies to increase worship attendance is to involve people in small groups (Sunday school or life/community groups). It is also in these groups that life-changing discipleship is most observed. There is little evidence to suggest that people not involved in small groups will, in significant numbers, catch God's vision for the church and for their individual lives and join in what God is doing.

When you study rapidly growing churches today, it is rare to find one that does not excel in all of the following six areas. Even if one area is under-developed, it tends to impact growth and the church's ability to live out its mission. They are:

- Relevant Worship.
- High levels of small group participation.
- Excellent children's programming, especially on Sunday morning.
- High levels of hands-on mission involvement.
- A “market-oriented customer service” mentality.
- Communicating to connect people to Christ more than just connecting them to the church.

In order for the church to be fruitful in its mission, it is imperative that the leadership of the church understands where God is leading this congregation and that this vision is communicated clearly and broadly.

Successful churches understand and design their financial stewardship enhancement efforts with firm knowledge of the impact that clarity of vision and life-changing ministry has on the generosity of their donors.

## **Four reasons why people give to one organization over another:**

### Belief in the Mission

The number one reason why people give is the belief and confidence that their gift will make a difference in the lives of other people. People give large gifts to big dreams that they believe will have an impact.

### Respect for Staff Leadership

People give to people, not institutions. When donors have confidence in those who are leading, they will be more willing to offer their gifts (and to consider increasing their gifts). Building strong relationships between the pastor and donors is both vital and necessary.

### Fiscal Responsibility

Financial accountability and transparency builds confidence and trust between donors and the church. People give more willingly and generously when they have the belief that money is being used for the purpose it has been given, when there is openness to sharing information related to financial matters and when they are kept informed. They respond poorly to 'save the sinking ship' appeals.

### Understanding of Biblical Giving Principles

Giving is an expression of Christian discipleship and spiritual growth. Preaching and teaching of what the Scriptures teach about generosity will cultivate deeper giving. The focus of these ideals is that giving is more about the person's need to give rather than the church's need to get.

## **Lyle Schaller's seven characteristics of churches that know how to compete in the 21st century philanthropy marketplace:**

They learn how to ask. They take the initiative.

They talk about causes and not budgetary needs of the institution.

They specifically train key staff and laity in how to present the case to potential donors.

They are credible and honest.

They are constant in maintaining relationships with donors.

They offer donors choices.

They know how to say thank you.

## CHURCH SUMMARY

### Broadmoor United Methodist Church Historical Data

#### Worship Attendance

2012	905
2013	865
2014	795
2015	762
2016	684

Worship attendance is the best indicator for growth. Attendance at BUMC has decreased about 22%. Several reasons have been suggested for this change:

- Issues with previous pastoral leadership
- Deaths of members
- A change in the worship schedule (one service was eliminated and the times for the other three services were changed)
- Major flooding in 2016 impacted hundreds of families in the community and several church families relocated due to damage to their homes

#### Generosity

	<u>Total Giving</u>	<u>Per Worshipper</u>
2012	\$2,240,329	\$2,475
2013	\$2,170,445	\$2,509
2014	\$2,075,359	\$2,610
2015	\$2,192,978	\$2,877
2016	\$2,031,365	\$2,969

Giving per worshipper is another critical indication of a church's health. From 2012 through 2016 giving overall decreased due to the drop in attendance. However, giving per worshipper increased 20% during this same time period. There are several possible reasons for this shift: (1) in light of a drop in attendance some donors may have increased their giving to help address an expected shortfall, (2) excitement and confidence about the future of the church under new pastoral leadership and (3) growth in people's personal discipleship which impacts giving.

The average giving in 2014 for United Methodist congregations is \$2,000 *per worshipper*. Thus, the giving at BUMC remains higher than the denominational average. However, it should be noted that the UMC as a denomination has one of the lowest levels of giving, thus indicating there remains room for growth in generosity. One of the issues facing BUMC is that the congregation is aging which will have a negative impact on future income.

## LEVELS OF GIVING

NUMBER OF CONTRIBUTING HOUSEHOLDS	GIVING LEVEL	TOTAL GIVEN BY HOUSEHOLDS IN RANGE
EXAMPLE Five households	\$6,000-\$9,999	Five households gave a total of \$42,500
11	\$15,000 or above	\$298,025
26	\$10,000-\$14,999	\$310,127
61	\$6,000-\$9,999	\$451,785
112	\$3,000-\$5,999	\$463,462
83	\$2,000-\$2,999	\$197,781
58	\$1,500-\$1,999	\$99,976
79	\$1,000-\$1,499	\$95,109
94	\$500-\$999	\$66,683
57	\$300-\$499	\$21,945
173	Less than \$300	\$15,705
626	No Recorded Gift	\$00.00
<b>Total Number of Contributing Households =1,380</b>		Total \$s Contributed = \$2,020,598

Broadmoor UMC was established in 1955 as the community of Baton Rouge expanded, creating outer suburbs from the city's core. Over the years the church has experienced massive growth, known for its music program and other ministries. It was at one time the largest church in the conference. Several community groups utilize the church's space for its own programs. In more recent years the church has experienced decline as the neighboring community changed.

The church has several staff persons with long tenures, including one of the Associate Pastors, Music Director and the Business Administrator. In addition to the Senior Pastor who began in July, 2016, there have been several other key recent staff changes including the Youth Pastor, Children's Pastor and an Associate Pastor.

Over the past several years the church has experienced decline as the community surrounding it changed. It is currently estimated that in the four zip codes surrounding the church that 42% of the population is Caucasian, 41% African American, 7% Hispanic and 6% Asian. The attendance and membership of BUMC does not reflect its neighborhood, which are perhaps the greatest challenges the church faces if it is to begin growing again and remain vibrant.

The church leadership has established four priorities for 2017:

- Invest in congregational care
- Invest in youth and children's ministries
- Invest in technology
- Invest in worship through effective planning and maintaining excellence

Steps have been made towards fulfilling each of these areas.

Two major events occurred in 2016 within the largest community which has had an impact of the life and ministry of BUMC. The first was major flooding that impacted the greater Baton Rouge area that destroyed thousands of homes and businesses, causing many to permanently relocate.

The second was the shooting of Alton Sterling by local police which led to rioting. Shortly after this, Gavin Long (from out of state) shot six police officers.

Both of these events resulted in national coverage and presented the church with the opportunity to address significant issues of flooding and racism.

In 2010, the church contracted with Bill Easum to conduct a report for the church, which led to recommendations regarding BUMC's strategic plan for the future.

BUMC offers three worship services and two different styles. The church is led by the Senior Pastor, Rev. Donnie Wilkinson and three Associate Pastors: Rev. Ken Carroll, Rev. Bertrand Griffin III and Rev. Shannon Sandifer.

## **OBSERVATIONS**

In reviewing all of the data collected and information shared, several observations have emerged. These are observations in the truest sense in that they do not contain any sense of judgement, positive or otherwise, in and of themselves. These observations include:

1. The church's mission statement is: "*We are called to invite people into a relationship with Jesus Christ, to equip them with a faith that works in real life, and to send disciples into the community and world and serve in Jesus' name.*" It appears on the home page of the church's website, the weekly bulletin and in press releases.
2. The four key words of the mission statement are "Invite, Equip, Send and Serve." These words are sung at the end of every traditional worship service.

3. The church reports 1,380 households. Of those, 572 families gave at least \$200 in the past year, which according to MortarStone would define them as core donors. There are 182 households who gave less than \$200 and 626 households who gave \$0 for a combined 60%. It is not unusual for churches to have at least 50% of households to be non-givers.
4. The top 1% of core giving households (six households) gave \$168,600 or about 8% of the church's income. The target range for the top 1% to give is between 8-14% of total income.
5. The top 10% of core giving households (60) gave \$758,174 or about 37%. The ideal for this group to give is between 37-43% of total income.
6. The budget for 2017 is \$2,391,584.
7. An annual campaign was conducted for the 2017 budget. Several programs have been utilized in recent years (New Consecration Sunday, Treasure of Transformed Hearts, and Extravagant Generosity).
8. The church has no debt.
9. Several spiritual formation classes either are or have been offered (Alpha, Disciples Bible Study, Companions in Christ and short-term studies).
10. The fiscal year is from January-December.
11. The 2017 budget includes \$1,435,102 which is dedicated to staff salaries and benefits. This constitutes about 60% of the budget. The recommended percentage for this section of the budget is between 50-55%.
12. Thirteen (13) households gave at least \$20,000 in 2016. An additional 19 households gave at least \$15,000 and an additional 55 families gave at least \$10,000.
13. It is reported that Rev. Donnie preaches on the topic of stewardship regularly.
14. Rev. Donnie has access to giving records and reviews them twice a year. He is notified when a regular financial supporter stops giving, when a new household begins giving, when someone's giving increases and when there is a gift of unusual size. He sends a personal note to first-time givers. All gifts to special causes are acknowledged. People can review their giving through the church's website.
15. Weekly offering reports are not printed in the weekly bulletin.
16. Pastors write five hand-written notes a week to people to lift them in prayer.
17. BUMC has an established Endowment Fund, including a Gift Acceptance Policy. There are eight endowment accounts with an estimated amount of \$734,047. The largest account is designed for property matters and has

\$344,671. A relationship with the Louisiana Methodist Foundation has been established to receive any endowment gifts that may be given to the church. There is an Endowment Committee which is scheduled to meet regularly and which has plans for a Legacy Dinner.

18. Electronic giving is available to members with about 11% of the church's income received in this manner. Options include online giving through the website, text-to-give and electronic funds transfer. There are clear directions on the website for how to give online and includes a thank-you email when a first-time gift is given.
19. Beginning in 2017, giving statements are sent monthly via email and quarterly to those who do not have an email address on file. The third-quarter statement is sent to all giving households. Prior to this year, statements were sent three to four times a year. A letter from Rev. Donnie is occasionally included along with information about electronic giving.
20. Ministry moments occur during the offertory and talk about a ministry of the church. Groups within the church sign up for times when their ministry can be highlighted. Guidelines are provided for the speakers. The primary focus is educating people about a ministry and to invite people to participate.
21. Apportionments have been paid in full annually in recent years.
22. A new church logo is being developed.
23. There are two traditional worship services held in the sanctuary and one contemporary service held in the casual worship center.
24. The Finance Committee receives a monthly report. The primary matrixes highlighted are cash flow and projections about income/expenses to evaluate whether the church is on track to meet the budgeted expenses.
25. The church uses ACS for its management software.
26. The church reports that over 25% of members are involved in a hands-on ministry at least annually. The church has several active mission opportunities (locally, nationally and abroad) for people to be involved through hands-on ministries and missions.
27. The church operates the Children's Learning Center, a child-care and preschool program. Approximately 7% of the children are from households within the church.
28. There is not a prescribed process required for those who wish to become members. Those who have been attending regularly are invited to a luncheon where information about the church is offered. Those who choose to do so can join at the luncheon or at another time. There are no expectations of new members.

29. There has not been anyone responsible for overseeing discipleship development over the past two years (prior to Pastor Bertrand's appointment in July, 2017 as the Associate Pastor).
30. Financial Peace University is offered on a regular basis.
31. It would appear that a few of the pastoral (including Donnie) and ministry staff are tithing from their church income according to giving records from 2016. Others on the staff appear to be giving between 20-80% of a tithe. There are three staff persons who are new to the church since that time for which no information was available. There are no expectations regarding giving for the staff.
32. Based on giving records, it would appear that the majority of those serving in leadership (Administrative Board, Staff Relations Team, Trustees Team and Finance Team) are percentage givers or tithers. Three members from this group are either nominal or non-givers according to church giving records.
33. BUMC has a Servant Leader Covenant which describes the characteristics of what is expected from those who agree to serve in a leadership position. Giving is reviewed before someone is invited to serve.
34. A process is in place for connecting with first-time guests when contact information is known.
35. There were 105 people who joined in 2015 and 2016. Of these, 23 were youth confirmands and 13 were adult professions of faith. Sixty-nine (69) joined either by transfer from another UMC or from another denomination. The adults who joined by any process represent 58 households.
36. Of the 58 households who joined in the past two years (not including youth confirmands), 10 (18%) are actively involved in mission ministries of the church as of September of 2017.
37. Of these same 58 households, 23 households gave \$0 in 2015-2016 and seven households gave less than \$200. This would suggest that half of those who joined in this period are non-givers. In addition to these households, 18 gave at least \$1,000 total over this two-year giving period. Only one of these households were in the top 10% of donors in 2016.
38. Of those who joined in 2015-2016, 68 have been in attendance in the past three months.

## **REVIEW OF FOCUS AND MINISTRY GROUP MEETINGS**

Following are some notes of particular interest from the various focus and ministry groups who participated in this study.

### Executive Staff

- There are several persons who have served on the church staff for long tenures.
- The image of the church is that of being a 'doing' church but it is hidden in a neighborhood. Most of the neighbors do not know us.
- The next six years are critical for the future. We as a church either 'crack the code' to learning how to connect with our community or we become a dying church overwhelmed with managing a large campus.
- Many of our high capacity donors are aging or dying. We are not bringing in many younger families.
- The hope for Stewardship Discovery is to identify three to five things we need to stop doing and learn three to five things we need to start doing in order to grow our giving. We need to learn how to crystalize what stewardship is within our congregation: that giving is about a transformational life in Jesus Christ rather than the church bills.
- Due to a vacuum of leadership, there was a lack of clarity about staff roles and responsibilities. While everyone needed to be on the bus, some needed to be in different seats.
- The priorities for the coming year are:
  1. invest in congregational care
  2. invest in youth and children
  3. invest in technology
  4. invest in worship

### Spiritual Formation

- No one has had primary responsibility for discipleship for the past two years.
- There are many Sunday school classes but no clear information is available for those who may be looking for a group.
- No one oversees the development of small groups, though there are several Emmaus reunion groups within the church.
- Several classes are offered, such as Alpha (with 80 people) Disciple Bible Study, Companions in Christ and short-term studies.
- Only about 7-8% of children in the preschool or day care program are connected to the church. Most children come from outside of the neighborhood.
- The staff sponsors the Christmas Program for the preschool and they promote church activities with the families as a way to encourage them to attend church.
- A challenge for the youth ministry is having 60 different schools represented by teenagers who are connected to BUMC.

## Worship

- There are three worship services offered: two are traditional and one is casual.
- The key words of the mission statement, “Invite, Equip, Send and Serve” are sung at the end of the traditional worship service every week.
- Multi-media is used in all services for lyrics, sermon video clips and camera feed.
- During the offering there are ministry moments which offer a story about a ministry of the church. While some are videotaped, others are live. Speakers have guidelines but their script is not reviewed by any staff person. Ministry groups sign up to reserve a time when they will share a story about their efforts.
- The casual service uses contemporary music written after 2000 as well as arrangements of hymns. It also identifies as rock/country alternative. The traditional services are organ-led with a choir at each.
- Music is intentionally tied to the sermon theme in all services.
- There is weekly worship planning to finalize music and liturgy though a goal is to create more long-term planning.
- The greatest challenges for the traditional services are creating energy in the early worship service and having more advance information about hymns to help the organist prepare arrangements that complement the theme.
- The greatest challenges for the casual service are finding qualified and trained technicians, more consistency in the quality of music between the bands that rotate weekly and finding a way to improve the acoustics in the space they utilize.
- A weekly goal is to have one idea/statement conveyed through the sermon, music and liturgy that people can take with them when they leave worship.

## Finance Team

- The church uses ACS as its management software.
- Electronic giving options are available and about 11% of giving is received through one of these methods.
- Monthly giving statements are sent by email to those who prefer this method of communication. Quarterly giving statements are sent to those who prefer a hard copy. Third-quarter giving statements are mailed to everyone and again in November.
- Giving statements contain primarily financial information but occasionally a short letter from Donnie is included.
- People can log onto the website to check their giving. This information is kept very current.
- A letter is typically sent at the beginning of summer to encourage people to maintain their giving while away on vacation.
- Donnie is notified of first-time donors and he sends a personal note.
- About half of the new members (2015-2016) are core givers to the church.

## Communications

- The four key words of the mission statement, “Invite, Equip, Send and Serve” are included in the weekly bulletin, the website, letterhead and are on the mugs given to guests. The full mission statement is “*We are called to invite people into a relationship with Jesus Christ, to equip them with a faith that works in real life, and to send disciples into the community and world and serve in Jesus’ name.*”
- The primary means of church communications are:
  1. Weekly bulletin
  2. Weekly email with announcements
  3. Weekly email with scripture and reflection from the previous sermon (sent to those who opt in: about 130 people)
  4. Sunday school bags: flyers and special announcements are sent to classes
  5. Social media: Facebook (1,547 friends), Instagram (250), Donnie’s Facebook
  6. Worship announcement slides offered before/after worship and in the Connection Café
  7. Billboards to promote special events
- Two announcements are vocally offered at worship and they must share information that impacts the full congregation.
- A new logo is being developed for branding purposes.
- The website is also being rebranded. Currently the homepage is member driven but the goal is to become external focused and to also be mobile friendly. It is hoped this will be ready by Christmas.
- The church budget is available to those who request it at the church office. People can contact Michael for more information.
- All pastors write five hand-written notes a week to state that they are praying for those families. Every family receives at least one of these notes a year. Donnie also writes notes to people for special purposes.

## Hospitality

- When a guest visits for the first time and identifies themselves through the Connection Café or through the registration of attendance, the following occurs:
  1. A gift bag is hand delivered from a volunteer which contains local coffee, a letter from Donnie, a campus map and other items.
  2. A hand-written note from Christy, the Connections/Hospitality Coordinator, is sent if an address has been provided by the guest.
  3. A phone call is made the following week whether or not they have returned.
  4. A letter from Donnie is sent the third week from the initial visit, though this practice is not consistent.
- An email or phone call is made if address is not available.
- The Connection Café is open from 8:30-12:00 on Sundays with volunteers at the booth and with Christy seeking out first-time visitors.

- New member Sundays are offered two to three times a year. Donnie sends a letter to those who have been attending regularly and who have been identified as new member prospects. People are invited to attend a luncheon where staff is also present. There is an informal atmosphere and people are welcomed to join at this luncheon should they choose to do so.

### Missions

- A new format for youth mission trips is being created for the following year. The mission trip for Junior High students will be local/close to home and High School students will participate in a nationally based trip. An international mission trip will be designed for High School seniors. This is in addition to connecting with local church-wide mission opportunities.
- The church has three priority missions:
  1. Southeast Ministries: a food bank ministry founded by BUMC and now supported by several churches
  2. Habitat For Humanity: several volunteers participate in this effort to build new homes
  3. Hope Ministries: focuses on mentorship and poverty issues and provides financial support and some volunteers
- Kindness Outreach offers (1) Day of Compassion with members working on projects in the neighboring community and (2) Parker House which is a foster home for children, many of which attend worship at BUMC.
- There are several other outreach programs: Laundry Love, annual garage sale with a free pancake breakfast with proceeds going to missions and a partnership with Broadmoor Elementary School.
- The church is developing anti-racism efforts in conjunction with other churches.
- The Christmas Eve offering is dedicated to meeting the mission's line item in the annual budget.
- The greatest challenge for the mission's team is finding effective ways to communicate the array of opportunities the church offers for people to participate in hands-on ministries.
- Flood Relief: In response to the flooding that occurred in the summer of 2016, the church provided flood buckets, clothing distribution, helped members of the congregation effected by flooding, mucked out 100 homes in the community, offered \$500 in gift cards to members and \$250 gift cards to others impacted by the flooding and raised \$80,000 for flood relief efforts.
- Racism: BUMC has been addressing the issue of racism in light of the shootings in 2016. They have a relationship with the Inter Faith Federation and have a partnership with both St. Paul the Apostle Catholic Church and Hope UMC, both of which are African American congregations.
- About 10% of new families are involved in a hands-on ministry.

### Focus Group #1

- Most of the participants have memories of giving coins to the church as children.
- Several reasons were stated as to why they give to the church:
  1. to support the mission of the church
  2. they believe in what the church is doing
  3. trust in the leadership of the church
  4. "We don't give: we give back as it is not my money"
  5. God expects us to be good stewards
- They dream of being a destination church, to help those who live in the neighborhood and to provide worship experiences for the Asian and Hispanic communities.
- Most expressed the feeling that there is a lack of transparency about financial matters of the church and that information is limited to those who serve on committees. There is poor communication between the staff and the laity surrounding financial issues. People do not know who serves on various committees or information about the budget.
- Several families were upset about the way the change of the worship schedule was handled and the church office closing on Fridays.

### Focus Group #2

- No one lives in the community but drives several miles to get to the church that has been their home church for years.
- Reasons for giving to the church include the belief funds are used efficiently, out of obligation, a belief that money is being used to make a difference and holy habit.
- "Stewardship is a 12-month focus, not just a fall campaign."
- Each person gives to other organizations but the church gets the most dollars from everyone except one.
- Three out of the seven families give electronically. Others prefer writing the check.
- They do not feel the church is fully transparent about financial issues. There is a belief that information is guarded and known only by a few people.
- The biggest opportunity facing the church is outreach to the immediate community, hurricane support and rebuilding a relationship with young families.
- Six of the seven families have made decisions regarding their estate but none have the church included.

### Senior Pastor

- Donnie grew up in the church but did not experience giving to the church until he began serving in the pastoral role.
- He is informed when a regular giver stops giving and when a new gift starts or increases.

- There is no expectation of giving for the staff or for new members, though giving is a consideration when enlisting people to serve in leadership positions.
- He is curious as to how much of the church's resources comes from those who worship in the traditional service verses the contemporary service.

## MISSION OF THE CHURCH

The church's official mission statement is: *"We are called to invite people into a relationship with Jesus Christ, to equip them with a faith that works in real life, and to send disciples into the community and world and serve in Jesus' name."* The most common expression of the mission statement is the listing of the four key words: "Invite, Equip, Send and Serve." These words are sung at the conclusion of every traditional worship service and utilized in various communication pieces. No one was able, when asked, to repeat with ease the entire mission statement in its official form.

The full mission statement is prominently displayed on the website, the weekly bulletin and in press releases. The shortened version is more commonly utilized.

BUMC may want to consider shortening the mission statement to make it easier for people to remember and to increase their ability to reference what God is calling their church to do.

## PLAN TO INCREASE INCOME

Horizons is well aware that the initial inquiry to us was to ask for assistance in increasing income. Gifts to the church are, however, more related to how members (donors) *feel* about the ministry of the church than how gifts are sought or the plate passed. Broadmoor United Methodist Church could easily get caught up in wanting to use money as a "bottom-line" barometer and that would be tragic. The following recommendations address not only the practice of financial stewardship at the church, but also ways to improve persons' desire to give more to the church.

**The church must not lose sight of the fact that they are NOT called to "raise money" or "give money," but to make disciples (to offer life-changing connection to the living God by inviting people to follow Jesus). All fundraising is done to make disciples. All buildings are built to make disciples. All budgets are set to make disciples. A balanced budget is not necessarily a sign of a healthy church. A sea of changed human beings is.**

Peter F. Drucker, in "Managing the Non-Profit Organization," puts it well. *"A business has discharged its task when the customer buys the product, pays for it, and is satisfied with it. Government has discharged its function when its policies are effective. The 'non-profit' institution neither supplies goods or services nor controls. Its 'product' is neither a pair of shoes nor an effective regulation. Its*

*product is a changed human being. The non-profit institutions are human-change agents. Their 'product' is a cured patient, a child that learns, a young man or woman grown into a self-respecting adult; a **changed human life altogether.**"*

In his book "The Spirituality of Fund-Raising," Henri Nouwen says, "*Fundraising is proclaiming what we believe in such a way that we offer other people an opportunity to participate with us in our vision and mission. Fundraising is precisely the opposite of begging. When we seek to raise funds we are not saying, 'Please, could you help us out because lately it's been hard.'* Rather, we are declaring, '*We have a vision that is amazing and exciting. We are inviting you to invest yourself through the resources that God has given you—your energy, your prayers, and your money—in this work to which God has called us.*'"

Donnie credits this book as being a formational source in his theology of generosity.

## **AFFIRMATIONS**

There are several areas in which Broadmoor UMC is doing well with its stewardship practices. These include the following:

- The church has no debt.
- They have been intentional about conducting annual stewardship campaigns over the past several years.
- Weekly offering amounts are not included in the weekly bulletin.
- The church has an intentional hospitality plan to identify and connect with guests.
- The pastors write personal notes to members every week to let them know they are being lifted in prayer.
- They have electronic giving options available. Giving through the website is user-friendly.
- Giving statements are being provided more regularly this year than previously.
- They have a strong program of missions and outreach. Furthermore, it is estimated that at least 25% of the active members are involved through the giving of their time.
- Those accepting leadership positions sign a Servant Leadership Covenant.

## RECOMMENDATIONS

The following recommendations are offered that Horizons believes would cultivate greater generosity. Some of the recommendations are focused on developing and deepening practices the church already has in place.

**1. Create a formal process for membership.** Those who are considering membership with BUMC should go through a series of classes *prior* to joining, whether they are joining by profession of faith or transfer. This is a key opportunity to more deeply connect with people and to cultivate their immersion into the life of the church. All but one session should be led by laity. Horizons would suggest that BUMC consider using “A Disciple’s Path” by James Harnish. This six-week curriculum is focused on helping people to grow into their own Christian walk through the expectations of membership. People are generally more receptive to getting involved and connected when they first join a church than six or more months later, which makes this process even more critical. The church could also consider using a covenant with new members as a way to encourage follow-through. Carolyn Slaughter’s book “Following Jesus” is another good resource. A process should be developed by June, 2018.

**2. Strengthen the level of expectations for new members.** A common thread among growing, vibrant churches is that of being a high expectation church. This is based on the conviction the mission of the church is to make disciples rather than to make members. It requires a church to make the fundamental shift from seeing its focus from taking care of its own members to one of making new disciples. The expectations lifted up include commitments to faithful attendance in worship, faithful participation in a class/study/small group, the use of gifts and talents offered in a ministry or hands-on opportunity and giving, with the tithe being lifted up as the standard. These expectations should be shared during the classes for membership. Remember: membership is not the goal; discipleship is the goal. This increase in expectations for new members should be affirmed by church policy and in place by June, 2018.

It is also suggested that those who choose to join be given a commitment card during the classes which they then present when they join. The church should create a systematic process to follow up with new members in the months (and up to two years) after they join to support and encourage them as they live into the expectations of attendance, growing, serving and giving. The focus of this process, in addition to offering on-going encouragement, is to evaluate the church’s effectiveness in this journey in order to know if it is impactful.

The goal would be to increase the number of people who are actively engaged in the areas of attendance, small group connection, hands-on mission participation and giving two years following the date of joining. This plan should be implemented by summer, 2018.

Just as those accepting a position of church leadership sign a Servant Leadership Covenant affirming these expectations, so should the staff of the

church. Once in place, the next step would be to encourage the rest of the congregation to embrace these expectations.

It must always be remembered that the goal is to make disciples and not to make members. People should be assured that they can be an active part of the church in all aspects whether or not they become members. Membership is a choice to take seriously the goal of growing in discipleship.

It is also recommended that the responsibility for these first two recommendations be under the leadership of the Associate Pastor.

**3. Communication Plan for Financial Matters to the Church.** A challenge for every church is finding effective ways to communicate financial matters to the church. It is critical for donors to feel that church leaders are being transparent and open about issues related to money and how it is managed. However, transparency does not necessarily mean public. As a way to strengthen and clarify how to best convey information and a clear sense of transparency, the following images are offered to help shape how the church communicates with the congregation: 1) front porch, 2) living room and 3) kitchen.

Front Porch: Just as the front porch is a public space where one might encounter not only neighbors and close friends, it is also where one can meet new people in the community for the first time. While conversation is friendly and inviting, it is not thought of as intimate or overly personal. Seen from this perspective, talk about financial matters in public worship requires the balance of being transparent while not overly sharing 'in-house family matters.' This is why public announcements that send a message that the church is struggling financially should not be given. This 'over sharing' can be discouraging at best to guests and it can have a disheartening impact with their worship experience. While the clear intent is to be transparent, these types of announcements fail to fully convey critical information and leaves gaps of understanding that people must complete which, due to time restraints in worship, can lead to confusion rather than clarity. No church financial information should be listed on the website available for public viewing unless it is password protected.

Living Room: A living room is where one invites friends for socializing and for deepening relationships. This image focuses on the 'worship crowd.' When applied to finances, conversation about money should be focused on biblical principles of giving and the impact that generosity has on a person's life as well as stories of lives impacted through generosity. This should include ministries that are impacted by giving to the annual budget in addition to special offerings and mission outreach.

Kitchen: The kitchen is the place where one's closest friends are invited and where intimate, personal conversations are held, even when they are difficult or painful. The 'kitchen letter' is the place to address sensitive financial issues more fully without the concern for visitors and nominal members/regular attenders reading this candid sharing. Churches of BUMC's size would generally set the threshold to receive this channel of communication to be donors who contribute

at least \$500 annually (about 500 households). These letters can provide a fuller level of transparency while keeping it 'within the family' rather than a public airing. These letters should also include (1) a story of a changed life, (2) an expression of gratitude and (3) giving update. Kitchen letters (otherwise known as enhanced giving statements) should be sent monthly to all donors.

Other ways to communicate financial matters to the church could include: (1) regularly scheduled town hall "State of the Church" meetings where financial matters, along with other issues, are addressed and questions answered, (2) a video message from Rev. Donnie and (3) a line item budget, while not of interest to the vast majority of giving households, should continue to be made available to those who request it.

The 'kitchen letter' should become the most valued form of communication from the church to its committed core. The general rule of thumb is that members who receive the 'kitchen letter' would hear of changes, plans, etc., first, before learning about them in the church hallway.

An additional letter should continue to be sent in December to encourage year-end giving.

Sharing open and transparent data and updates grows trust and confidence within donors.

**4. Grow Electronic Giving.** Research reveals that only 33% of all consumer transactions are managed with cash and checks (only one in six checks is processed through the banking system in paper form). The remaining 67% is handled digitally. In a survey of 1,100 churches, 49% reported their giving was behind their budget needs, 37% stated their giving was on track with their budget and only 14% indicated that giving was exceeding their budget needs. Upon further review, it was discerned that the primary difference between churches whose giving exceeded their budget needs and others was a strong emphasis on electronic giving. Donors give more and do so with greater consistency when using some form of electronic giving. We live in a culture where the church must become more adept in this arena.

While BUMC currently offers electronic giving, it is only receiving 11% of its giving through this means. This recommendation simply encourages the church to strengthen its efforts to encourage and teach people to give electronically by creating a strategy for teaching and encouraging use of electronic options with a goal of reaching at least 25%. It must not be assumed that electronic giving is a generational issue as there are younger people who prefer not to give in this manner to the church just as there are people who are older who do. BUMC may want to consider expanding the options of electronic giving and expanding the ways it teaches people how to utilize this way of giving. One option many churches use is to offer \$1.00 offerings per month to go towards a special cause using Text-To-Give. A testimony or instructions can be offered as a way to give to a special offering.

The keys to increasing usage of electronic giving include:

- Educate and promote electronic options in written, verbal and digital platforms.
- Be intentional and consistent.

**5. Create a Year-Round Generosity Calendar.** For too many churches, stewardship is seen as an ‘annual sermon on money.’ In reality, generosity is the result of effective discipleship and should be cultivated through an intentional plan and woven into the church’s unique process. Horizons will assist in helping BUMC create a plan for developing and implementing a year-round generosity plan as a supplement to the church’s ministry plan.

**6. Relationship with MortarStone.** A wealth of information can be discerned through an intentional and focused review of giving records beyond whether donors are on track with pledges and if budget needs are being met. MortarStone is a company that partners with faith-based organizations such as churches to analyze both internal and external data. Understanding giving behaviors, the ability to identify and track new donors or when someone’s giving significantly changes, and the ability to interpret giving data can provide helpful insights which can then lead to a more holistic picture of your church’s givers. MortarStone provides a platform that can help the church assess and evaluate matrixes that can help the church grow generosity in its members.

MortarStone’s proprietary social matrix algorithm allows you to analyze your donors based on their real-life behaviors and interactions with your church. The service offers its users unique metrics developed to drive action such as:

- **Giving Score:** A measure of an individual’s giving capacity, based on wealth data.
- **Affinity Score:** A measure of an individual’s affinity for Broadmoor, based on the scheduling, frequency, and amounts of their gifts; as well as their social media interactions, levels of volunteerism and program participation and church leadership participation.
- **Engagement Score:** A combination of both the Affinity Score and Giving Score, the Engagement Score measures the comprehensive giving potential on an individual basis.

A group of leaders, to include at least the Pastor, Church and Finance Administrators and Finance Committee Chair should schedule a demonstration with MortarStone to learn what services they offer and how BUMC could benefit.

**7. Share Ministry Stories.** The church is already using the offering time in worship to share about its ministries. Various groups sign up in advance to promote their specific events and activities. Horizons would recommend adding another component: sharing stories of how these events and activities have impacted lives. Examples could be a story about a child or youth who experienced Christ through a Sunday school class or youth group experience, a person whose life was impacted by a study in their small group and new

relationships formed through a ministry to those living in the immediate neighborhood. This provides the opportunity to lift up not only an upcoming event but to celebrate how dollars and participation given in these ways are also having an impact on people's lives.

These testimonies can include thanks for giving and financial support, but should never ask for money. They can be video-taped or shared live. They should always be written down before hand to ensure brevity and clarity. Each story should be posted on the website. Donors today, more than ever, want to see measurable results in the church's ministry so they can see their gifts are a good investment.

#### **8. Evaluate the hospitality plan with visitors/guests for its effectiveness.**

Broadmoor UMC has several key components in place to connect with first-time guests and other visitors. But given the decline in worship over the past few years, it would be prudent to intentionally evaluate its effectiveness. A church only has one chance to make a first impression. A first-time visitor who doesn't know anyone, nor knows where to go once inside a building, experiences hospitality with a different perspective from regular attenders. The church should evaluate its current hospitality and welcoming practices and compare with practices of churches who are growing significantly. The book "First Impressions: Creating WOW Experiences for your Church" by Mark L. Waltz (available through Amazon) is a good resource. Another highly recommended resource would be the "Mystery Guest Program" offered by Faith Perceptions ([www.faithperceptions.com](http://www.faithperceptions.com)) which will provide an objective and clear analysis of how a first-time visitor experiences BUMC.

#### **9. Review the plan to promote and market the church's Endowment**

**Program.** The church has over \$737,000 in restricted endowment accounts, which is a smaller amount than what could be expected from a church of its size. There does not appear to be an effective marketing program in place to promote or receive new estate or other planned giving gifts. The largest amount of wealth to ever pass from one generation to another will be occurring over the next 20 years. But the church cannot assume that they will be automatically included in how people, including active and engaged members, choose to manage their estates. There must be the recognition that the church is competing for estate gifts with a multitude of other organizations (i.e., education, medical, not-for-profit groups, and the arts). Every church wishes they were receiving more legacy giving than it is currently receiving, but such gifts require intentional development. BUMC has an established Endowment Committee and there are plans in place for a Legacy Dinner for those who have indicated the church is included in their estate planning and to encourage others. Horizons is offering to meet with this group to review their plans and to offer suggestions for cultivation of the endowment program. An excellent resource is "Creative Giving: Understanding Planned Giving and Endowments in Church" by Michael Reeves, Rob Fairly (President of the Louisiana Methodist Foundation) and Sanford Coon.

### Implementation Plan

Recommendation	Responsible Party	Implement Date	In Place (√)
1. Clarify a formal process for new members			
2. Create culture of being a high-expectation church for new members, staff and members			
3. Communication plan for financial matters to the church			
4. Grow electronic giving			
5. Develop a year-round generosity plan			
6. Relationship with MortarStone			
7. Share ministry stories			
8. Evaluate hospitality plan			
9. Review marketing plan for endowment			