

YOUR
YEAR-END
GIVING
PLAYBOOK

6 Practical Ways to Finish 2022 Strong



**A Simple
Year-End
Giving Plan
is Included!**

horizons
STEWARDSHIP



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INTRODUCTION

For most churches, 2022 has been a time of re-assessing and re-imagining how to be the “church.” Church leaders have been asking us how church giving has been affected by all the changes we have experienced in the past two years. One of the constants is the need to prepare for and execute a robust year-end giving strategy. Most churches receive a disproportionate amount of yearly funding in the last four weeks of the year. With a strong year-end plan, you can fully fund your 2022 ministries and launch 2023 with generosity momentum.

So, how can you end well in 2022 and prepare for a dynamic start to 2023?

In your Year-End Giving Guide, you will find six strategies to help you end 2022 in a healthy financial position and prepare for a strong start to 2023.



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1 Adopt an Abundance Mindset

Are you or your members operating under a scarcity or abundance mindset? A scarcity mindset is present when resources are thought to be scarce, or members are thought to be giving “all they can.” Neither of these is true. God has provided all the resources you need to do all that God is calling you to do. It’s TRUE! It may be, however, that the resources are still in the bank accounts of your members.

[Curing a scarcity mindset](#) takes time and discipline. It’s important to not fall into the trap of believing there is simply not enough. Thinking from an abundance mindset means you realize the need to engage your donors in authentic and meaningful ways. It takes more than simply asking for an estimate of giving once per year. It also doesn’t mean constantly begging people to give more money. Adopting an abundance mindset means focusing on God’s vision and inviting members to be a part of what God is doing through your church. It requires intentionality, a focus on the needs of your mission field, and a plan to inspire your members to meet these needs.



KEYS TO SUCCESS

- Make giving about gratitude and not about funding the budget. People give to big dreams and compelling visions, not to salaries and overhead. Generosity comes from knowing God is the source of all gifts and giving thanks with a generous heart.
- Sharing your vision for ministry is important, but it is even more important to inspire and invite others to be a part of it. Most donors are contributing to multiple charities. Make a case for how their increased giving to your church will help you fulfill God’s vision today.
- Remember that estimates of giving are just one way of engaging donors. In fact, churches that are using the same tired message of “fund our budget because we need the money and God wants you to” are generally experiencing declining giving. While [Scrapping Your Boring Annual Campaign](#) is a great start, it alone is not enough. To grow a culture of abundance and generosity, it also takes a strategy of consistently messaging your ministry impact stories connected to specific ways people can join what God is doing through their giving such as scheduled giving/automated recurring giving, text to give, Required Minimum Distributions, appreciated assets, and planned giving. Use hyperlinks and “contact us to learn more” invitations to make accessing these forms of giving quick and easy.



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Connect with Financial Leaders *Today*

In most churches today, the majority of resources are contributed by just a small percentage of members. These financial leaders have invested heavily in your ministries and expect you to put their resources to work in the world. Before the year is over, it is imperative that you connect with your financial leaders and provide

them with a first-hand account of all you have accomplished and all you hope to accomplish in the year ahead. Tell them how their generosity has enabled you to do the work God has called you to do. Invite their feedback about what you hope to accomplish in 2023. People support more generously initiatives they feel they have a part in creating. Inviting financial leaders into these important conversations will ensure they continue to provide the resources you need to fund your ministry.

Although the world has changed, what remains constant is that donors still want to support causes that matter. Donors want to know that their investments are making a difference to others. Help them to understand the urgency and importance of your ministry and how they can be an integral part of it through their generous giving. Your donors will likely make significant contributions at year-end. Help them see why your church is worthy of their support.



KEYS TO SUCCESS

- Whether in small groups or one-on-one, reach out to those whose generosity makes your ministry possible.
- Express gratitude for their generosity and invite their input on your plans for the year ahead. Remember to affirm how important they are—not how important their money is.
- According to MortarStone analytics, 50% of donors give less than \$200 annually and account for less than 5% of ministry funding. Conversely, 5% to 15% of donors usually account for the majority of ministry funding.
- Report back regularly to your donors to let them know how their resources have enabled ministry and created an impact in the world.



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3

Tell Donor Impact Stories

Donors want to be a part of what God is doing through your ministry. They want to feel their participation matters. There is no more effective way to generate year-end giving than to tell your story. Storytelling is essential for building donor trust and inviting their participation.

According to [Professor Russell James, J.D., Ph.D., CFP®](#), the fundraiser's role is to complete the life story of the donor. As a sage who accompanies the donor on the journey, the fundraiser challenges donors to venture beyond their self-focused world and enter into a journey that creates an impact in the world beyond. When asking donors to support your cause, "you're giving people the opportunity to be a part of something bigger than themselves."

In a video from the [Nonprofit Storytelling Conference](#), Chris Davenport and Steven Screen assert that the story that raises the most funds is an incomplete story that invites the donor to provide the conclusion. In other words, the story leaves the problem open-ended and invites the donor to consider playing the role to finish the story. They suggest identifying an urgent need and inviting the donor to decide how the story ends.

Telling donor stories is a perfect year-end strategy. For example, your church has a tradition of providing backpacks with weekend food to children in your community. You might ask in this way,

"For the past 9 years, it has been our privilege to fill backpacks with weekend meals for 79 children at Forrest Elementary School. It costs \$144 to feed each child during the year. Beginning this September, we are expanding this ministry to Williams Elementary where 64 identified children are at risk of going hungry if we don't act. Please ask God how you are able to respond to God's goodness in your life and the needs of these at-risk children."

By choosing to donate, the donor plays a role in completing the story God is wanting to author. Of course, following up with the donor to share impact stories is critical to establishing trust and credibility. It also lets the donors know they have made a difference in the world through their generosity.



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KEYS TO SUCCESS

- Identify your urgent need and quantify what you will need to be successful. Use social media, your website, and announcements to make the ask.
- Always connect your ability to do ministry with the generosity of your givers.
- Tell your stories of success and how you have made an impact in the world thanks to the generosity of your donors. Use facts and figures to support the story, not be the story.
- Use weekly offering talks in worship to share stories of how your ministries are making an impact in the lives of those you serve.
- Use donor-centric language and thank people for being generous.



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4

Participate in GivingTuesday

Ten years ago, GivingTuesday was established as a way to encourage and promote radical generosity. Since that time, the number of participants and the amount contributed has grown exponentially. In 2021, [an astounding \\$2.7 billion](#) was contributed to churches and charities in the United States. According to [GivingTuesday Data Commons](#), an estimated 35 million

people participated in GivingTuesday activities in 2021 – it is likely some of them are members of your church.

Whether you choose to encourage gifts to your ministry budget or a special project, participation in GivingTuesday is easy, cost-effective, and gets results! There is no cost to join, and any church or charity is eligible to participate.

Remember a large portion of your donors will participate on GivingTuesday, so be sure they have the opportunity to give to you!



KEYS TO SUCCESS

- Establish a GivingTuesday goal and identify where funds will be used. Consider giving to a special mission appeal, or if your annual fund needs the boost, all contributions could be directed there.
- Create a GivingTuesday landing page on your website with links to all your GivingTuesday promotions. Provide space on your home page to share your financial goal and track progress.
- Begin now to publicize your participation in GivingTuesday, November 29 in all publications, announcements, and social media. Use hashtag #GivingTuesday.
- Review your website for ease of use. Ask a few people to test out the giving process and provide feedback. Include GivingTuesday as an option on your dropdown list of funds so you can track your success.
- Celebrate everything you receive and remember to express gratitude to those who participated.



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Reinvigorate Your Planned Giving Efforts

In many churches today, the largest contributors are in their 80's, 90's, and even 100's. Losing just one of these senior saints can result in a substantial loss to your ministry funding. Some church leaders are realizing the impact and inviting these long-time members to endow their contribution to the church. For example, if Beverly

is contributing \$20,000 annually to her church, her bequest of \$400,000 would provide a \$20,000 contribution to the church at a 5% interest rate. Beverly's contribution continues in perpetuity and helps continue her legacy of generosity through her church.

The recent surge in interest in planned (or legacy) giving has been profound. The [Wealth Tsunami](#), or the passing of an estimated \$60 trillion from the Baby Boomers to their Millennial children, has already begun. Five times larger than the transfer of wealth from the Greatest Generation, this wealth tsunami has the ability to change the financial trajectory of churches and charities. Year-end is a perfect time to remind people of their ability to make the church a beneficiary of some or all of their accumulated wealth.



KEYS TO SUCCESS

- Be prepared to receive planned gifts. Review your documents such as your endowment charter, gift acceptance policy, and spending policy. Being ready to respond to donors' questions about their contributions to the endowment fund will help support your ministry in perpetuity.
- Realize that you don't have to be a financial expert in order to talk with donors about leaving a legacy. Most donors already have financial advisors who are well-versed in planned giving vehicles and options. What donors need to hear from you is how the church will mobilize resources to make ministry happen. That's your sweet spot!
- Ask someone who has arranged for a bequest to the church to share his/her testimony about why and how the planned gift was made. People need to see that planned giving is not exclusively for wealthy people. Anyone with an asset can make a planned gift to the church.
- Your church's foundation or Horizons Stewardship can help you establish and grow this critical funding score.



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6

Measure Your Results

You're implementing creative and innovative new strategies around giving and generosity. How do you know if it's working? Knowing what to measure and how to measure it can ensure your year-end efforts continue to provide the income boost you need. At a minimum, you will want to know how many people are contributing to your ministries and the amounts of their contributions.

Comparing changes in the number of your donors and the total of their giving from period to period, along with tracking changes in average, median, and mode will help you determine how well you are moving the needle. Measuring age distributions and concentrations of giving by donor segments also provide helpful insights.

If you want to dive deeper into the data, Horizons' [analytics](#) can help. Analytics is a more in-depth view of your giving data that includes information such as lapsed donors, first-time donors, and significant changes in donor behaviors. Understanding the giving behaviors and patterns of your contributors allows you to make strategic decisions based on actual data rather than perceptions. It also allows you to identify what strategies are effective and those that are not. Horizons' analytics can help you work smarter and more efficiently to grow your generosity culture to the next level.



KEYS TO SUCCESS

- Determine the data you need to be successful and set up reporting systems to track it through your Church Management Software.
- For special appeals, such as GivingTuesday or Missions offerings, establish tracking systems to ensure you are able to measure the number of donors and the amounts of their contributions.
- Consider a more robust process for analyzing donor giving patterns through Horizons' analytics. Real-time data regarding donor giving behaviors enables you to establish more timely and effective communication strategies and grow giving.



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NEXT STEPS

Do You Need Help?

We are already working with church and nonprofit leaders, like you, to guide them toward a strong finish in 2022 and to launch into 2023 with momentum. If you need a partner to join you on this journey, or just someone to explore ideas with, we are here to help.

You can contact us at horizons.net.



A SIMPLE YEAR-END GIVING PLAN

Year-end giving can be a game-changing spiritual and financial experience for your church. Most churches never prioritize this giving season. As a result, many of the dollars that could have been used to maximize their ministry impact were simply directed elsewhere.

If your church doesn't make this appeal, well-meaning, good-intentioned organizations will receive your donor's charitable giving instead of you.

A Few Tips for Year-End Giving

- **Year-end giving is a big deal for your financial leaders:** It's not uncommon to see stock transfers, large cash transfers, or even large checks come through in the final week of the calendar year. Be sure to designate someone with the authority to be available to answer the phone or be onsite at the church to facilitate these transactions.
- **Timing of your emails matter:** Your emails are most likely to be read if they arrive in the early morning, late afternoon, evening, or on Saturday and Sunday afternoons.
- **Add a Personal Touch:** Sending an email/letter from a real person (rather than the organization) results in a significantly higher readership.
- **Use a Matching Gift Challenge to Increase Giving:** Incentivizing donors using a matching gift at year-end can increase your response rate significantly.
- **Use a Goal Tracking Bar:** Engage donors by setting a goal and tracking progress on your homepage. Donors love to see momentum.
- **Create a Sense of Urgency:** Use a countdown clock to create a sense of timeliness and urgency.
- **Include a conspicuous "Give Now" Button:** Donor participation is lower when there is not a clear "Give Now" button on your homepage. Placing it at the beginning is better than at the end of the appeal.
- **Make Online Giving Feel More Secure:** Setting the credit card fields apart from the background and adding a simple padlock icon increases confidence that donor information is secure.

Communicating During the Final Weeks of the Year

Year-end giving communication should be the primary focus of your social media, web, and email for the year's final days. Here is what a coordinated plan might look like for your church. You can vary this as you are comfortable.



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Below is a road map of suggestions or prompts. Feel free to make it your own. *Please note: The repetition is intentional.*

The Week before Thanksgiving

- Announce participation in GivingTuesday and your focus.
- Create a section on your homepage, above the fold, where you indicate people can participate in GivingTuesday through your church.
- Add GivingTuesday to your social media content rotation with stories of life change.
- Don't be afraid to set a goal and even utilize matching gifts to encourage participation.

The Week after Thanksgiving

- Send a letter from the pastor to all members and regular attendees highlighting life change and ministry impact, and ask them to prayerfully consider making a special year-end gift to your church to finish the year strong. Includes instructions, "Gifts must be postmarked by December 31 to receive the tax benefit in the current tax year."
- Include a self-addressed stamped envelope in any letter appeal for people to respond quickly.
- Don't forget to include instructions on how to give online or who to contact about non-cash giving.

The Week Before Christmas

- Send a letter or email from the pastor to all members and regular attendees that includes a personal story of how generosity has resulted in personal transformation and enabled the church to minister and grow disciples. includes instructions, "Gifts must be postmarked by December 31 to receive the tax benefit in the current tax year."
- Include a self-addressed stamped envelope in mailed appeals for people to respond quickly.
- Don't forget to include instructions on how to give online or who to contact about non-cash giving.

December 26

- Update your website to remind people about year-end giving and the impact it could make through your church. This should be a banner image at the top of the website when it loads on mobile or desktop. Countdown clocks can be effective eye catchers.
- Link the banner image to your giving page.
- Share a story of life change or resend one of your most impactful stories of the year by email and through all your social media channels. You can write it several ways and post it twice daily on social media. (Do not email twice!)



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December 27

- Send an email about how to make a year-end gift to your church. Don't forget to include links to make it easy for someone to complete their gift online. Also, include a contact name, phone number, and email for special giving requests or needs.
- On social media, share another story of life change or resend one of your most impactful stories of the year by email and through all your social media channels. Be sure to link to your church's giving page. You can write it several ways and post it twice daily.

December 28

- Record a video message to be shared via email, social, or both where you invite your congregation to include your church in their year-end giving. Be sure to share who and how to contact you about stock transfers or other gift questions.
- Be sure to link it to your church's giving page in any communication.

December 29

- Send an email out in the evening highlighting a story of life change and impact. Keep it short, and invite people to make their final, tax-deductible gift by December 31. Be sure to include a "give now" link.
- On social media, share a story of life change or resend one of your most impactful stories of the year. Be sure to link to your church's giving page. You can write it several ways and post it twice daily.

December 30

- Send a short video from the pastor reminding everyone of the many ways in which the church successfully ministered to people throughout the year. Cast a Vision of Hope for the coming year.
- Thank everyone for their generosity and wish them a safe and happy new year! Use an uplifting subject line like A Special Message of Hope From Your Pastor. In the accompanying copy, insert a short reminder that there is still time to maximize charitable deductions for the year and advance the church's ministry by making their gift before midnight, followed by a "Give Now" button.
- On social media, share a story of life change or resend one of your most impactful stories of the year through all your social media channels. Be sure to link to your church's giving page. You can write it several ways and post it twice daily.

December 31

- Send a brief email with the subject line: There is still time to maximize your Charitable Deductions. Simply explain how to make a year-end gift to your church. Include online options, dropping a check



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by the church office, or who to contact for non-cash or special giving opportunities.

- On social media, share a story of life change or resend one of your most impactful stories of the year by email and through all your social media channels. Be sure to link to your church's giving page. You can write it several ways and post it twice daily.

Don't Forget to Say Thank You

Say "thank you" early and often to everyone who demonstrates generosity during year-end giving. Some of those thank you's may fall into the first week of the new year. That's okay.

Make sure you review your online giving confirmation email, acknowledge gifts appropriately, and align with your appreciation strategy to deliver a personal and thoughtful experience for everyone who gives to your church.

Giving is first a spiritual experience and second a financial one. So, a gift is a response to spiritual growth. Don't miss the opportunity to celebrate that.

ABOUT HORIZONS STEWARDSHIP

Horizons Stewardship helps church and faith-based nonprofit leaders grow disciples and fund ministry through a collaborative framework that is tailored to the unique culture of the church, aligned with leadership's vision, and implemented through coaching, planning, technology, and analytics to ensure the church lives into its full ministry potential and impact.

After more than three decades of working with thousands of churches to raise billions of dollars for ministry projects, Horizons has refined a deeply integrated, spiritually-focused approach that consistently results in more ministry funding and more effective disciple-making strategies.

Horizon's ministry team of International Coaching Federation (ICF) trained coaches are ready to help you discover a proven, effective process that will empower you to move forward with clarity and confidence. On average, churches that partner with Horizons experience a double-digit increase in giving within the first twelve months.