

Developing a Financial Communication Plan

As a leadership team, what messages do you want to communicate to the congregation?

- In general?
- About the financial health of the congregation?

How do you communicate your ministry story to the congregation and the community?

- Who is your target audience?
- What target audience do you want to add?
- Who is responsible for communication happening?
- How might you use your current approach and second or third time?

How do you currently communicate the financial health of the ministry to the congregation?

- Who is your target audience?
- What systems do you have in place to make this happen?
- Who is responsible for the pieces of the system?

What resources do you have that might help you communicate the financial health and needs of the congregation?

In addition to Sunday worshippers, who loves and cares about the ministry you are accomplishing?

- Community
- Friends Elsewhere?

How could you share your story with them?

How could you invite them to support the ministry being accomplished?

What opportunities do you have to say “Thank You” in the course of your ministry?

- Who is your target audience?
- What target audience do you want to add?
- Who is responsible for communication happening?

What resources do you have that might help you say “Thank You”?

- Who is your target audience?
- What target audience do you want to add?
- Who is responsible for communication happening?

Suggested Schedule for Giving Statements (Delivered, Mailed, Email)

January

- Previous Year Summary Statement
- Year-End Thank You summarizing ministry accomplished in Previous Year

Two Weeks after Easter

- Year to Date Giving
- Thank You with images/stories from Holy Week and Easter

July or August

- Year to Date Giving
- Depends in part on your school schedule
- If school starts back after Labor Day, then send statement in July with Thank You focused on some ministry happening over the summer like VBS.
- If school starts back in early August, then send statement right after school starts back with Thank You connected to youth ministry, support for schools, or faith formation

October

- Year to Date Giving
- Thank you focused on ministries launching in the fall
- Ideally this is sent prior to any financial stewardship emphasis

December 1

- Year to Date Giving
- Thank you focuses on ministries for the year or looks ahead to ministries that will be accomplished at Christmas because of generosity

General Notes

- Use people pictures if possible
- If pictures aren't possible, tell specific stories of ministry accomplished (For example, "Because of your generous support, over 200 people experienced the journey of Holy Week and the Joy of Easter at Grace." is more helpful than "Because of your generous support, we had a wonderful Easter worship service.")
- From a design standpoint, less is more and white space is good.
- On your statements, include contact information for how to ask for corrections.
- On your statements, delete any references to "Balance Due" or "Amount of Pledge Remaining". This is a giving statement, not a bill.