

WIN TEAM UPDATE: Financial

July 2018 – Manchester UMC

PRIORITY:	Grow the Financial Resources of Manchester UMC
GOAL:	By December 31, 2021: <ul style="list-style-type: none"> • \$500,000 raised for HVAC upgrade • \$400,000 raised for mortgage principal payments
LEADER:	Pastor Phil Estes
WIN TEAM:	Ed Crawford, Ali Fields, Tom Hilton, Cheri Hoeflerlin, Craig Hoeflerlin, Tom Lawrence, Jennifer McGillivary

A. Briefly describe the most helpful resources your WIN Team is using to gain relevant information:

- The source of our financial priorities is the Leadership Board.
- Our approach is discerned through team idea sharing, including consultation with Rusty Lewis of Generis Stewardship.

B. Based on your learnings, briefly describe what trends/realities your WIN Team sees working in our favor:

The Leadership Board's decision to move away from the "One Fund" approach by narrowing our stewardship priorities to just two capital initiatives (Mortgage Principal payments & Heating/Cooling system upgrades) improves our ability to communicate key needs clearly and concisely. Success improves when we use "SMART" Goals, i.e., goals that are specific, measurable, attainable, realistic and time-based.

There has been a clear message from laity that paying down the debt and improving heating and cooling systems is critical to free funds for ministry over the long term.

While the 2018 change in the tax code provides an increased standard deduction*, the predominant opinion among stewardship experts is that individuals and families develop a commitment to tithing and giving over time which is motivated by spiritual discipline, a matter of the heart.

C. Based on your learnings, briefly describe what trends/realities your WIN Team sees working against us:

The 2018 change in the tax code allows a new standard deduction (e.g., \$24,000 for married filing jointly). While committed tithers will likely continue to give regardless of the tax code, individuals with less commitment to the identified mission strategy of the church may give less.

D. Briefly describe the 5 most impactful insights/discoveries/lessons your WIN Team has uncovered so far:

Insight #1	A giving sermon series is most effective in growing stewardship.
Insight #2	Personal studies, like Financial Peace University offer biblical learning around money, and grow stewardship leaders.
Insight #3	Church growth will always fuel improved finances. A clear and compelling Vision/Mission is a critical success factor.
Insight #4	Positive and frequent interactive communications, small group gatherings, and one-on-one meetings with giving leadership improve giving.
Insight #5	Clear, easy to understand messages are most effective by answering questions like: "What do you want me to do? How do you want me to do it? When do you want me to do it? and What will result for the mission?"

E. Describe how your WIN Team recommends that we define/measure/count progress toward the goal:

Giving will be tracked by the Finance Office. Results will be reported to the Leadership Board and congregation at least quarterly.

F. Does your WIN Team feel the goal is achievable or does it need to be adjusted up or down? Why?

The team feels it is achievable. For perspective, MUMC has approximately 1,100 giving households. Our goal of \$225,000/year equates to **\$205/household**.

G. Provide 5 strategies your WIN Team has identified (or seriously considering) to help achieve the goal:

Strategy 1:	See Communications/Events Below	Due Date:	
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Communications and Events

Spring:

- **“52 Weeks” mailer** with Commitment Card (W/O April 30)
- **Donor Dessert** (Led by Pastors Greg and Phil, May 21, 6:30 p.m.; Staff providing desserts;
- Presentation by L.B. Chair Emily Garretson or designee (L.B. Activity in support of vision)

Summer/Fall “Unfinished” Refresh Plan:

- **May 19/20, Pentecost Birthday of the Church Worship Theme**
- **August Informational Meeting – August 13, 2018**
 - Open to the Congregation
 - Update on church financials
 - Highlight Capital Needs (Mortgage principal payments/HVAC)
 - Q & A
- **September Consecrate** Youth Room Remodel in worship – Date TBD by Greg. Youth/parent Life Impact Story
- **October**
 - Sermon Series – Pastors Greg and Stephanie; “The Acts 4 Church”
 - Weekly Life Impact stories – video
 - Call for new pledges and growth in pledges to support Unfinished priorities of General Fund, Debt Reduction/HVAC Goals by **November 11, 2018**
 - Generosity Team weekly presence in Narthex Kiosk
- **New Member Class** (Ongoing):
 - Vision Video
 - Unfinished Brochure and possibly revised version of the 52 Weeks piece
 - Commitment Card

H. Describe how your WIN Team will monitor/measure each strategy to see if it is successful (LEAD Measures)

Strategy 1:	Giving performance to budget will be measured using five categories: <ol style="list-style-type: none"> 1. New Pledge Fulfillment 2. Identified/Non-Pledged Giving 3. New Member Giving 4. Special Gifts to Mortgage Principal 5. Special Gifts to HVAC Sinking Fund
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I. What are some “quick wins” (easy steps), if any, that your WIN Team suggests we take now?

- *Pentecost Gifts and pledges received as of June 30, 2018: \$32,845 (Mortgage \$22,600**; HVAC \$10,245)*
- Youth Room Goal of \$50,000 surpassed. Total as of June 30, 2018: **\$57,696**. I also received a verbal commitment to fund carpet for the entire youth room space. Cost TBD.

J. What else would your WIN Team like the Leadership Board to know about your efforts?

*The **standard deduction** amounts will increase to \$12,000 for individuals, \$18,000 for heads of household, and \$24,000 for married couples filing jointly and surviving spouses. For **2018**, the additional **standard deduction** amount for the aged or the blind is \$1,300.

**Includes unpaid pledges of \$4,010.