

WIN TEAM UPDATE: GENEROSITY
February 17, 2019 – 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, Debbie Hilton, Tom Hilton, Cheri Hoeflerlin, Craig Hoeflerlin, Tom Lawrence, Jennifer McGillivray, Rev. David Bennett, Vicki Strohm, Joe Strohm, Kurt Rehwinkel, Phillip Lynn, Phil Wiseman, Matt Pasley, Ali Fields

1. 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, Barna Group, and other stewardship publications.

2. 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) improved 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.

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

As of 12/31/18, giving remained strong and projected revenue was achieved, with a small surplus of \$19k. The 2018 change in the tax code allowed a new standard deduction (e.g., \$24,000 for married filing jointly). This change was a potential negative variable. However, it was expected that committed tithers would continue to give regardless of the tax code, in some cases, exceeding their pledge. 2018 results appear to have born this theory out. Tax code changes remain a concern for 2019.

4. 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? – Grow in Financial Stewardship to support life change; How do you want me to do it? – Be intentional with money management/put God first on your monthly budget; When do you want me to do it? and What will result for the mission?” – More lives changed for Christ/more savings for ministry through utility/interest expense savings.

5. 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 monthly, to the and congregation at least quarterly.

6. 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**.

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

Strategy 1:	See Communications/Events Timeline Below	Due Date:	
	<p><u>Communications Next Steps - 2019</u></p> <ul style="list-style-type: none"> a. Begin Spring Communications Mailers (Feb./March) b. Emphasize Biblical Money Management through Financial Peace University (FPU) (Winter/Fall Sessions). c. Begin organizing team for 2020 FPU Momentum emphasis d. Continue to prepare environment for a single-year ask (2020), and move to two-funds (Operating/Building) v. one fund. <p><u>Financial Peace University "Momentum" 2020 Classes</u></p> <ul style="list-style-type: none"> a. FPU Adult Class b. FPU Teens c. JRs Adventures d. Legacy Journey e. Smart money Smart kids 		

Communications/Events Timeline

Spring 2019

- **2018 Annual Report** – Celebrate life-impact supported through financial stewardship (1st week of March)
- **First Quarter Life-Impact mailer**; link giving progress to ministry impact; Revised Commitment Card (Late April)
- **Donor Dessert** (Late May; Staff providing desserts)
 - Presentation by L.B. Chair Mike Clement or designee (L.B. Activity including support of 2018 – 2021 Goals)
 - May, begin scheduling informal one-on-one coffees

Summer/Fall 2019 “Unfinished” Finish Strong Plan:

- **Mailer - Late May/Early June: Pentecost Theme – Birthday of the Church and Life Impact**
- **August Informational Meeting**
 - Open to the Congregation
 - Celebrate Successes
 - Update on church financials
 - Highlight Capital Needs/Progress (Mortgage principal payments/HVAC)
 - Q & A
- August One-on-One coffees - Phil
- **September** - Celebrate Youth/parent Life Impact through new Youth Center (Partner with Boemler/Peich)
- **October 2019**
 - Sermon Series
 - Weekly Life Impact stories – video
 - Call for support of 2020 General Fund, Debt Reduction/HVAC Goals; Strong 2019 finish
 - Promote 2020 Financial Peace Momentum effort
 - Generosity Team weekly presence in Narthex Kiosk

- **New Member Class** (Ongoing):
 - Include Stewardship Discipleship learning component
 - Commitment Card

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

Measures:	Giving performance-to-budget will be measured using five categories: <ol style="list-style-type: none"> 1. Pledged Giving 2. Non-Pledged Giving 3. New Givers 4. Special Gifts to Mortgage Principal 5. Special Gifts to HVAC Sinking Fund 6. Communications assessment by Generosity Team
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9. What are some “quick wins” (easy steps), if any, that your WIN Team suggests we take now?

- Celebrate Youth Center Remodel/Giving Achieved
- Announce 2018 Year-end Financial results/Ministry Program WIN team results (March Annual Report)

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