

Generosity Committee Meeting Minutes

March 9, 2023 7 p.m. via Zoom

Attending: Rick Blum (staff), Scott Rogers (Chair), Health Allen, Jen Holmer

The meeting started with a prayer by Rick at 7:02.

Giving Update:

The meeting started with update on giving from Rick.

- Giving flat from 2022 to 2023. This is good news, since the campaign would suggest giving would go down by 4.5%. General at 20% of total, even though 16% of the year has passed.
- Dreaming Beyond giving 36% of total so far. Mortgage has been reduced to \$863,000 as of Mar. 1.
- We ended up with 462 Pledges total. 145 didn't turn in cards, but continued with their electronic giving..

Thank You Notes:

Rick said last year, the committee send personal thank you's (with some help) to everyone that donated to church that year. We have not done that yet in 2023, and it's already March. The question is whether we should still try and do something.

Scott pointed out that people that donated to Dreaming Beyond did get a thank you letter in January, and that he liked the Dreaming Beyond letter format. He wondered whether there was an opportunity to do an update on giving, plus add some Generosity themed communication with it?

Heather agreed that due to the lag, a personalized note would seem odd at this point. However, she thought what was most important to her was an acknowledgement.

Rick then mentioned that GSB has advocated strongly that we should use our quarterly statements as a tool to keep Generosity messaging going. He said we could use the 1Q statement as that tool instead of a personalized note.

Scott asked whether you could add a second non-personalized sheet to the statement. Rick said he thought you could, but he would have to check (**NOTE: Rick confirmed you could do that.**)

Scott suggested that we:

1. Stuff envelopes
2. Print all statements instead of emailing them.

Rick said he would check with Breeze to see what type of flexibility we have with the statements. **(NOTE: conversations with Diane and Breeze suggest we have some flexibility on how to do notes with statements. However, what we couldn't do was create a page break between a note and the statement, which might make the formatting wonky. The feeling from both was that stuffing a written note with the statement might be the best way to go.)**

Heather asked what type of numbers are we talking about in terms of notes to donors.

Rick said we received 462 pledges, but only 317 cards.

Scott reminded the group that last year, we didn't send thank you notes to the people that kept their electronic giving, but didn't turn in a card, because we didn't want to awake a sleeping bear that may not realize they are still giving to Good Shepherd.

Rick also pointed out that 50-75 of our major donors to Dreaming Beyond did already receive a thank you note for that donation.

Rick said if we went with the adding a letter to statement route, what should the letter say?

Jen said she thought if we just changed the statement with an acknowledgment, it would be a deposit.

The group also thought that adding a thank you letter isn't that hard for 1q, but adding a story might be. However, Scott thought there's a way to recycle stories to reuse content. Heather added that she's not a social media expert, but in social media there's a lot of repeats, so she thought that was a good idea.

Rick said in 2021, the stories shown in church were also sent as a written equivalent via direct mail. In 2022 we didn't, so if we did send something in writing, it wouldn't seem as repetitive.

Scott said we could take old blurbs, and update with new material, new stats of the campaign, and remind people to give. Rick asked whether anyone on the committee had the bandwidth to try and create a new piece. Scott said he could try that, but it would help if Jen or Heather can look at the stories. Jen and Heather both said they could. Jen thought this was a good idea, because it would remind people what they gave to. Scott also said we could ask GSB for stock or templates. He said he would Call GSB.

The question moved to a timeline. Rick said 1Q statements wouldn't go in the mail until early or mid-April. He thought if we held a Generosity meeting the week of April 10, we would have time to stuff envelopes then and sent out statements. Heather said she would be happy to stuff envelopes. Scott said he had been extremely busy, but he should have some time around in March to work on materials.

Recruiting:

The topic then moved to adding people to the Generosity committee. Rick said Nikki was getting married this summer and wasn't sure if she would return. Ronda also said she would be stepping away from the committee. Everyone agreed she had done plenty and deserved a chance to work on other things.

Scott wondered whether the first place we should look for committee members is the Dreaming Beyond house parties from last fall. Maybe we should look at the hosts and the attendees to see if someone would help generate money. He said the biggest donors at the non-profit he works at are our most effective recruiters. Jen was worried that some of the people on that list were already serving on other committees, so we should compare committee rosters to make sure we're not asking people to serve on multiple committees.

Rick said he would dig for data out of Dreaming Beyond house parties.

The group agreed to meet again at 7 p.m. Thursday, April 13 in the Verona conference room, prepared to stuff envelopes..

Action Items:

Rick:

- Talk to Breeze, see what's possible with Quarterly reports
- Get content to Scott by early next week.
- Talk to Diane about change in quarterly reports.
- Produce deadlines for communication for 1q by March 17.
- Review Dreaming Beyond house party attendees, look for possible new additions to committee for review in April.
- Finish committee meeting minutes.

Scott:

- Email Evan at GSB for templates and content.
- Look at repurposing content.

Heather and Jen:

- Review contents and make suggestions.

We finished with the Lord's Prayer at 8:55.

CODA:

Breeze updates –Drew Ruiz:

Ask about Quarterly reports,: No limitation on what the statement to have, you could definitely have. Statements from church vary greatly. No limitation.

Sending quarterlies both online and in mail: Yes, we could do that. When you go to statements, go to All Donors and hit print.

Adding a letter to online statements: You'll be able to generate a list of all the donors. When you do that, you'd have the option of emailing them or texting them all the same letter.