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# Annual Giving Statements

How to Surprise &  
Delight Your Givers



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"The annual giving statement  
represents an incredible moment to  
inspire and inform your givers."

- Generis

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## THE CALENDAR SAYS JANUARY

Someone is knocking on your door, slamming your email inbox or asking for a timeline because *“it’s time to send out those giving statement things.”*

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## AS A LEADER,

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you have tasks on your devices and lists. Not only are you responsible for the daily care of the congregation, you also deal with unexpected life moments that require your pastoral attention, lead the staff and volunteers, and - oh, by the way - the weekend and message prep that keep popping up every week. This annual statement is just one more function to get done. Or is it?

Taking what is normally a mundane administrative function and turning it into a powerful pastoral moment can not only grow your relationship with your giving community, but can position your church giving in a robust financial reality for all of 2019. Taking this obligatory moment and turning it into a vision-centering, mission expansion and pastoral connection is a shrewd move on your part as a leader. Elevating the giving conversation in your church to say thank you to givers is huge.

Do not miss this natural moment to invest into the spiritual life of your givers. It is worth the focus and the work!

Yes, you can go the easy route with the automated function in your church software. But do you really want to say “thank you” via a windowed envelope with a brief number of characters available to express your pastoral heart?

As you prepare an annual giving communication for your givers, we hope that using this resource to frame your work will make the task easier and more effective. This e-book will walk you through several important steps to engage with your givers on a new level this year, opening their hearts and developing deeper roots in their church engagement.

The work is well worth the effort as we engage hearts and demonstrate a spirit of gratitude!





## **THE IMPORTANCE OF AN ANNUAL GIVING STATEMENT STRATEGY**

[WATCH VIDEO](#)

See why a pastor should approach this important task, and you will be encouraged to take this vital step of building into the spiritual life of your congregation.

## **WHAT'S NEW FOR 2019 GIVING STATEMENTS?**

**1** Given that December is likely to have been a record setting giving month, you want to especially say “thank you” to those who have chosen to invest into your church as their highest giving priority destination. This giving statement should be one part of your thank you strategy. Consider a hand-written note to those who have made significant financial investments.

2 While 2019 might continue with an increased amount of appreciated assets, we have no certainty that the markets and economic currents will remain positive. A strong, effective response now might position you even better for prioritized giving in 2019 to your church.

3 The church continues to change within our culture. Some givers might be dissuaded from increasing giving to your church. Let's demonstrate high level gratitude as well as demonstrated impact from their giving to preserve giving.

4 As some economic clouds have lifted, we have perhaps the best moment in a decade to grow a giver base. Most church data shows that nearly 70% of givers give nothing or a minimal amount to the church. Given the increased optimism, we can begin a 2019 adventure to increase giving among those giving at lower levels.

5 **Social media continues to grow with its impact.** Simply sending a letter with a statement will not be remembered. Coupling your annual giving statement around a social media strategy will enhance your relationship and connect with your giver base substantially more than just a one-time statement distribution.

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GOAL FOR ANNUAL GIVING STATEMENT

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Sending out a giving statement shouldn't just be an administrative task. Many church software systems are designed to make the process simple and efficient. However, our goal is much more than efficiency...

Our goal is meaningful communication and connection with your giver. Efficiency systems tend to send an incongruent message to your givers.

Engaging the heart of the donors will further align them to the mission of the church, increasing their passion to give. We want donors to be ever increasing in their belief that giving to the church will be an outstanding investment into ministry.

**OK**

**LET'S GET STARTED!**

**02**

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TIPS FOR MAILING



Let's get practical as we begin this journey together. There are three main considerations about the mailing of annual giving statements: the envelope, cover letter and statement, and postage.

## ENVELOPE

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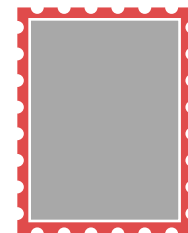
This mailing should be sent in an envelope that does NOT have a window that allows the giver's name and address to show through. (Remember, this is an exercise in building a pastoral relationship, not in communicating a transaction about giving data.)

Instead, the envelope should be addressed individually. A printed address is good; a label could be confused as a bill and would miss a natural relational connection with the giver's heart.

The use of a church envelope is appropriate for this mailing. This ensures the recipient will quickly recognize who it is from and increases the likelihood of the letter being opened right away.



Generis Church  
6455 E Johns Crossing, Ste  
275 Johns Creek, GA 30097



Julie & Jim Smith  
123 Anywhere St.  
City, State, 12345

03

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COVER LETTER & SUMMARY

# THERE ARE TWO PIECES TO THIS MAILING:

1

A cover letter from the senior pastor that exudes gratitude and shares vision.

2

A secondary sheet generated by your church software that shows the giving data for the last completed year.

The mailing should be assembled in a way that the first page seen as it is taken out of the envelope is the cover letter. The actual giving statement should appear as an addendum to the letter.

While the cover letter can be two pages, one well-written page is most effective. Keep in mind, we are engaging the giver for less than 90 seconds in this communication. The use of church letterhead is also appropriate for this mailing.

## POSTAGE

Avoid using bulk mail. Instead, consider using a large, colorful, first-class stamp. Why not use the postage meter undoubtedly awaiting your visit in the workroom, you ask? Envelopes using colorful stamps are opened at a much greater rate than metered mail. Studies often show that small steps, such as selecting an appropriate stamp, create a more engaged reading and an increased sense of connection.

**NOTE:** Your statement must contain the phrase “no goods or services were received in exchange for this gift.” Please check with your qualified attorney to make sure your statement is in IRS compliance.



### TOOLS CHECKLIST

- Church letterhead
- Church envelopes  
(with name and address printed directly on each envelope)
- Brightly colored first-class postage stamps

**04**

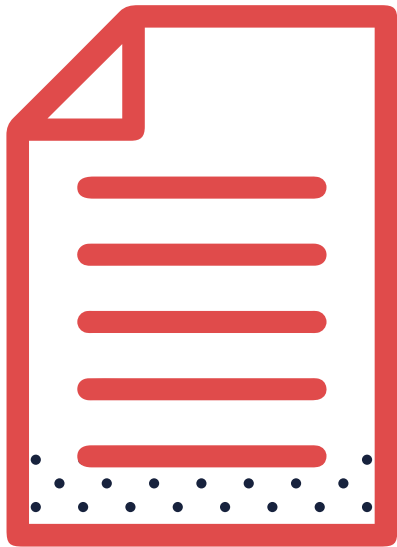
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COVER LETTER ELEMENTS

## STARTING THE LETTER

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Now that we have all our tools at hand, let's start crafting the cover letter itself. What you write in this correspondence is important. It should be addressed appropriately and should give thanks and encouragement to the recipient in order to make the best impact. Keep in mind, your goal is engaging the heart of the giver. The cover letter is where this will happen, so appropriate content and wording are essential. Here are a few guidelines to consider as you draft your letter.



## INSIDE ADDRESS

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Use the first name of the giver with the address. This creates a personal touch and builds relationships. Make sure names and spellings are correct. Errors in this mailing will send a message of non-importance.

## SALUTATION

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What is your reaction when you read “Dear Friend of Generis Church” at the top of a letter? It’s not exactly what you desire from those keeping watch over your soul, is it? Make it non-negotiable with first names. “Dear Jim and Julie” feels much better!

## FLOW OF THE LETTER

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The first paragraph is a relationally-affirming, one-line opener that prompts the reader to continue reading. No paragraph should be more than three sentences. No sentence should contain a conjunction like “and, but, or,” etc.

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SEGMENTS TO INCLUDE

# SEGMENTS TO INCLUDE

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- Several statements that highlight values of your church and celebrate what actions you want more of: “We are a church that...”
- A version of your mission statement, but generally not the actual mission statement that is often written in business language rather than faith-inspiring words
- At least two facts that demonstrate power in the ministry and value in their financial investment; “We grew by 28% in 2018. We baptized 130 people last year.”
- One brief story of a specific person to personalize the ministry and mission
- A reference to the exciting quarter or year ahead
- An affirmation of the spiritual value in their intersected faith and finances
- An alert to read their enclosed statement
- A relational affirmation to conclude
- An inspirational closing
- Signature of the senior pastor (Only the senior pastor should sign this letter - not the treasurer, not the business administrator, only the senior pastor. What if the pastor does not know what a household gives? This is simple to honor and deflect by saying, “While I am not aware of the actual amount you give, I am aware of the impact your investment makes.”)
- The P.S. to close (No, we are not reverting to junior high here. Studies show that the P.S. is the most read part of a letter. It becomes the best relationally connecting line of the letter.)

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COVER LETTER SAMPLE



Knowing that the standard church contribution letter decreases giver connection rather than building loyalty, here is an example of an uplifting and encouraging annual statement cover letter.

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Dear Brad and Lisa,

What a year we have experienced together at Generis Church! Could we have imagined God's work over just these last 365 days? Who could forget the 65 baptisms, each with such a fresh encounter with God through our church? How can we measure the impact of so many kids engaging with God thanks to the most incredible children's ministry volunteers? And fresh water now runs in our sister village of Tabora, Tanzania, eliminating disease and saving women and children the 3-mile round-trip daily walk for dirty water.

Yesterday, a single mom, Judy, teared up when she told me about her Life Group's embracing her and helping her to heal even though she only timidly walked through our doors five weeks ago. Way to go Hansens' Life Group! We are a church that makes a difference and gives ourselves away. We don't have to do this; we get to do this.

We get to do this because of people like you who generously invest financially to this incredible mission. Thank you. Your giving directly changes lives for eternity.

While I do not know who gives what amount, I do know that we as a church honor your investment and handle the responsibility with great integrity. For your records, I have asked our business team to include a listing of your gifts in this letter. If you have questions, please give Barry an email at [barry@generischurch.org](mailto:barry@generischurch.org).

2019 looks to be another huge year of life change. The stories continue to emerge on how we as a church engage with those who don't know God. We have challenges: our Kids' Zone is out of room; we know that seats are hard to find in the 11 a.m. service. Looks like we will go forward with our first multi-site this fall as planned! Our leadership team is on it. Look for updates on these and other things by May 1st.

Thank you for being such a vital part of the Generis Church. Buckle up for the year ahead!

A handwritten signature in black ink, appearing to read 'Don'.

Pastor Don

P.S. I cannot believe I get to pastor such an incredible group of people!

Generis Church  
6455 E Johns Crossing, Ste 275  
Johns Creek, GA 30097

**07**

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PRE-STATEMENT VIDEO

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Whether you choose to distribute your giving statement by postal mail or email, take advantage of the task to create a brief and powerful alert about the mailing.

You can do this with a simple, 90-second or less video to preview the statement ahead. (You could do this with an email only, but givers report that a personal, pastoral connection by video is far more effective.)

Sure, you can accomplish the same objectives in written format without the video. However, reading this level of content is a challenge to many of us with an already heavily-filled inbox.

A video is far more winsome, relational, and pastoral. The video can be done in less than five minutes, and the final version does not need to be perfect. Givers simply seek a personal engagement that elevates the relationship with your church and increases the connection between a person's giving and the impact that giving makes.

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THE ELEMENTS OF THE VIDEO

- ❑ Take another opportunity to say thank you
- ❑ Show that you are committed to your mission (and rehearse your mission in this segment)
- ❑ Mention something like, “Your giving, our unity, our work are making an impact. You give and important things happen. Lives are changed.”
- ❑ Give a brief narrative of your church’s impact in the last 72 hours (“Just this weekend, we saw 10 baptisms. Gloria’s story was amazing, was it not? We want hundreds more stories around here like Gloria’s!”)
- ❑ Give another taste of the year ahead (“2019 promises to be our best year ever.”)
- ❑ Alert that the statement is coming in the mail this week
- ❑ Ask the viewer to open and to interact
- ❑ **Bonus:** At the end of the video, consider having a series of people say thank you in very quick, short bursts. You could have the staff, the children in the kids’ ministry, the people in the lobby pre-service, and missionaries sending in video clips to give a series of thank you affirmations in this video. Be sure to make it energized with good music and pacing.

And in case you still need a nudge to create a video as a precursor to the distribution of your statement, check the video sample on the right for a real-life example of what your video can be like.

### IN-SERVICE ANNOUNCEMENT IDEAS

See how a pastor might address his congregation in a pre-statement video about the upcoming annual giving statement they will soon receive.

[CLICK HERE](#)

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IN-SERVICE ANNOUNCEMENT

The week before the annual statement goes out in the mail, take two or three minutes within the worship service to alert people to watch their mail and to highlight the statement. The time around the offering is a natural place to make this work.

**THERE ARE SEVERAL OBJECTIVES IN THIS ANNOUNCEMENT, INCLUDING:**

- Saying thank you to your givers
- Normalizing the conversation of faith and finances in a smaller way that will help to craft the larger spiritual value of giving
- Making the connection once again with the giver, saying, “Your giving makes an impact. You give and great things happen!”
- Telling a brief story of how your church has made a difference this week
- Alerting people that the statements are coming soon
- Affirming that the church financial leadership takes their work seriously. We manage funds well, honor your giving, and guard what has been entrusted with us. (If you have an annual independent audit, here is another perfect moment to remind the givers of the integrity around the church.)
- Making this moment so fun and informative that those who have yet to give are more likely to give (It is appropriate to mention that if you have yet to invest into your church, why not start today?)
- Asking the people to open and to interact with the communication that comes this week

How to Communicate to  
your Church About Annual  
Giving Statements

**WATCH VIDEO**

# SOCIAL MEDIA PLATFORMS

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While a postal or email distribution is adequate, effectively engaging your givers through social media can make their generosity come to life.

The best way to engage your church is through story. The more your church experiences firsthand the stories life change that have happened because of their generosity, the more generosity becomes ingrained in their DNA. It is no longer a vague concept with no tangible results - it is now something they can see and identify with. Human beings care about stories and other people more than they care about numbers and graphs.

Social media is a fast and easy way to keep these stories at the attention of your givers. Here are a few practical tips on implementing this approach:

- Select the social media platform you have the best engagement on and invest your energy there. Creating posts that are tailored to the specific platform perform better than posts that are cookie-cutter and blasted on every available platform.
- Take the week or month before the giving statement distribution to tell a story each day about some level of impact around your church. Make each story or photo personal and visually creative.
- Include a next step in every post you publish, and make it simple. Once you have the attention and emotional investment from your church via these stories, invite them to be a part even further. This could be something as easy as a link to give.

**Note:** Remember, the fewer barriers there are, the higher engagement you'll receive. Your audience is already on their phones, this is a perfect way to draw attention to your mobile giving.



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AN ADDED BONUS

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It's helpful to craft a narrative about the recent impact of the church along with the distribution of these statements, and that can be done very well through an annual impact report.

Sending an annual impact report prior to or in conjunction with an annual giving statement is wise, as it helps further connect your givers' generosity with the actual ministry impact it has.

Using an impact report, we can tell stories, report numbers, and share photos of how each individual's generosity affects the life and faith of others. Plus, it reinforces the giving journey and gives the reader encouragement to continue giving so even more can be accomplished through their generosity.

Here are a couple examples of great reports that showcase what content to include, as well as how to put it together in a visually appealing way.

## **ANNUAL REPORT**

Source File & Sample

[DOWNLOAD](#)

## **ONE PAGE IMPACT REPORT**

Source File & Sample

[DOWNLOAD](#)

# ENJOY THIS RESOURCE?

Check out more at [Generis.com/resources](http://Generis.com/resources)





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