



The Council for Health &
Human Service Ministries

United Church of Christ

What Will Stewardship and Finance Look Like Post-COVID?

Presented by the Office of Philanthropy, Technology, Identity and Communication (OPTIC) and United Church Funds

Welcome and Introductions



- Rev. Dr. Charles Buck, President & CEO
- Mr. Matt Wagner, Vice President of Institutional Relationships



OPTIC

Office of Philanthropy, Technology, Identity and Communication

- Rev. Kent Siladi, Director of Philanthropy
- Ms. Jacqueline Owen, Development Strategist
- Rev. Andrew Warner, Generosity Outreach Officer

Post-COVID Considerations

Individual donors and churches who support CHHSM agencies are consuming information and meeting in new ways, which will continue post-pandemic.

- How is your organization strategically responding to stay in front of these donors, partners, and stakeholders?
- What organizational shifts are still required in 2021 to prudently stewards existing assets?
- What new steps and channels are you using to expand your brand and reach new donors?



Review of Key Factors Impacting Non-Profits in 2020



- **Massive Fiscal Stimulus to Steady Markets**
- **CARES Act**
- **Strategic Pivots (Organizational and Financial)**
- **Social Unrest and Calls for Racial Equity**
- **End of the Trump Era and Political Shifts**



Finance, Endowment and Investment Considerations for 2021 and Beyond



- **Strategic Asset Allocation Review**

- ❑ 2020's volatility may have impacted asset allocation vs. investment policy.
- ❑ How has the social unrest in the US impacted your organization and donors?
- ❑ Does your investment policy reflect responsible investing parameters?

- **Budgeting for a New Normal**

- ❑ Budgets should reflect a post-pandemic reality

- **Endowment Governance Considerations**

- ❑ Distribution rates
- ❑ Gift Acceptance policies

Fundraising Thoughts for 2021

- **Healthcare and human services are critical during the pandemic.**
- **Don't hesitate to invite support!**
- **Build strategies around mission and values.**



Fundraising Thoughts for 2021

CONTRASTS:

Who can fill the seat?	How can we help donors fulfill their passion?
What is your organization's "why?"	What is your donor's "why?"

Fundraising Thoughts for 2021



“Giving is self-care.”

—Amy Poehler

UCC CARDD Survey

- In December 2020, the United Church of Christ's CARDD team issued a report that focused on the impact of COVID on UCC churches in 2020.
- Findings were based on a survey sent to UCC pastors.
- 345 out of 823 clergy responded (42% response rate).
- Responses were collected from mid-August through mid-September 2020.



UCC CARDD Survey



FINDINGS:

- 95% of churches reported that they stopped worship due to COVID-19
- 57% of the churches had not resumed in-person worship (at the time of the survey)
- 86% of the churches were providing online worship (only 9% offered online service prior to COVID) – an 855% increase
- 90% reported higher attendance rate for online worship
- 78% will continue to use the technology adopted during COVID

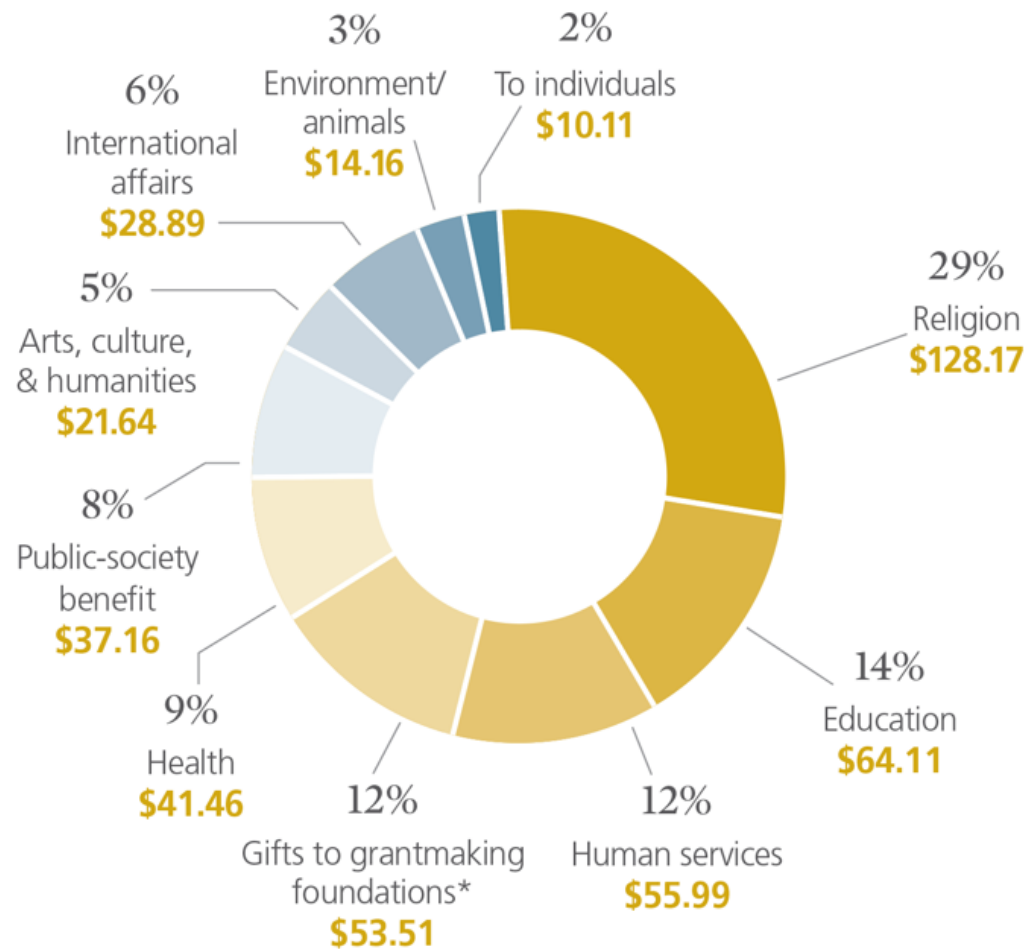
UCC CARDD Survey



How has giving in your church changed since COVID-19?

- 41.7% of churches noted a decline in giving.
- 19.8% of churches noted an increase in giving.
- 38.6% of churches stayed the same.

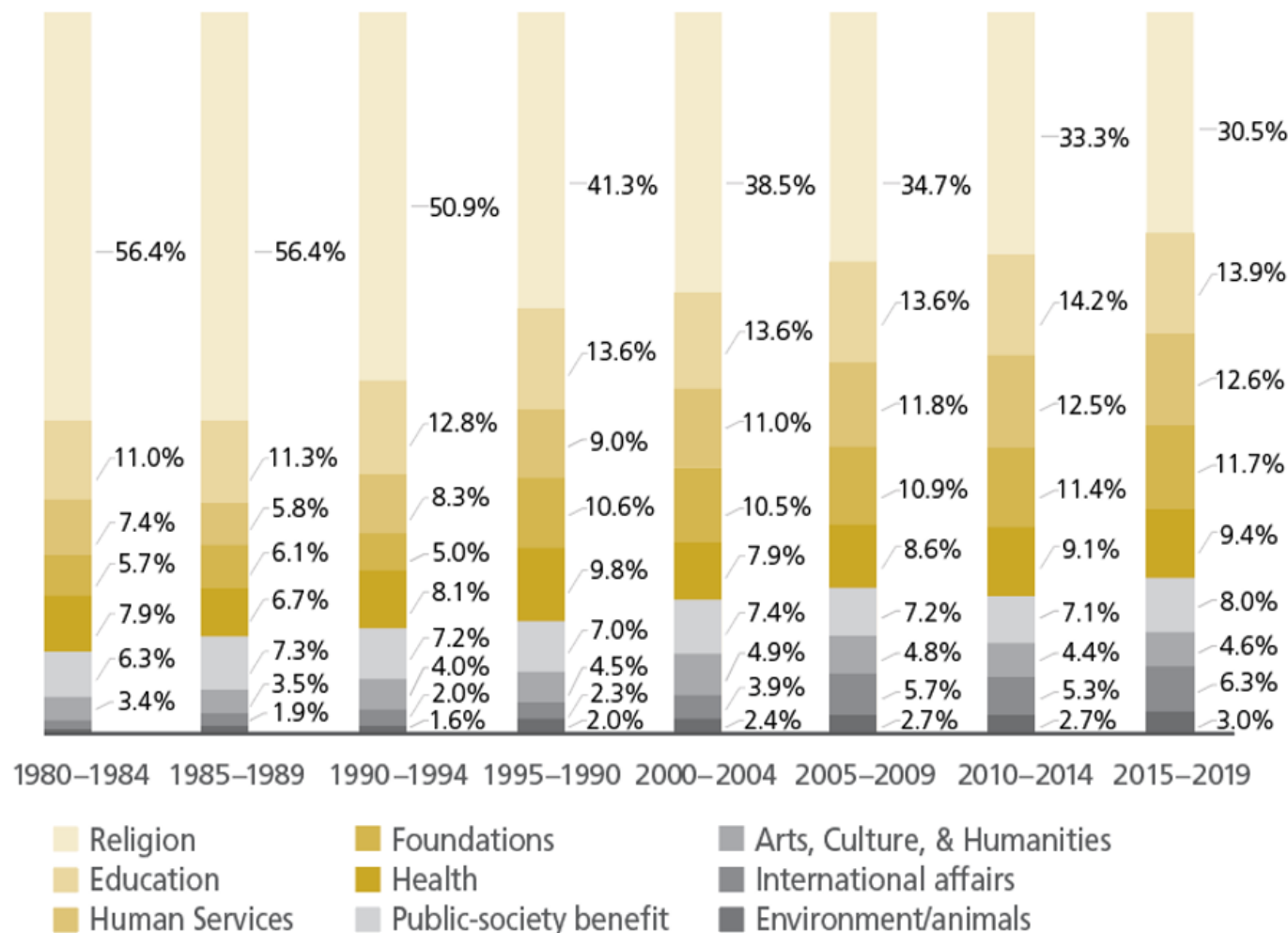
Giving Trends



**Giving in 2019
Remained
Very Strong**

2019 Contributions:
\$449.64 billion by type
of recipient
organization
(in billions of dollars –
all figures are rounded)

Giving Trends



Giving Categories Over Time

Giving by type of recipient as a percentage of the total in five-year spans, 1979-2019*

(adjusted for inflation, 2019 = \$100, does not include “unallocated”)

Giving Trends

Giving USA - Implications



Long term trends likely to be extended:

- More major gifts
- Less donors
- Static % of Income (about 2% of GDP)

Trends to Watch

- “Soft” and continual decline in giving to religion
- Growth of Donor Advised Funds (DAFs)

Questions

- As faith-based organizations, what role do you want to play in the faith-formation of donors?
- How can you help nurture a culture of generosity?
- How can you cultivate new and growing donors who in a previous generation learned through a faith community?

Questions & Answers

Don't miss our live workshop during the CHHSM Virtual Annual Gathering!

Thursday, March 4, 11:30-12:30 EST



For more information, contact:

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