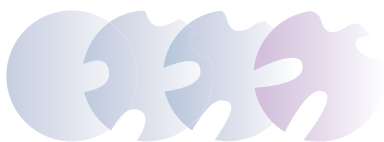


Planning for effective follow-up

Effective follow-up must be as personal as it is efficient. The goal is not simply more money for ministry, however important, but growing generous givers as part of personal discipleship. This paper offers guidance on follow-up that honours the response of the church and builds personal relationships.



Good follow-up matters. Congregational responses to the invitation to give generously are never a financial transaction to sustain an institution. Rather our giving response is a small but significant step in personal transformation, in generous discipleship. The heart of follow-up is a personal touch and appreciation, underwritten by efficient administration.

A triple-A rating is the highest rating that a financial institution can be given for the management of its funds. Follow-up has its own triple-A rating that assures well managed, personal follow-up of response forms.¹

Action: as easy as 1, 2, 3

We asked people to read our emails, letters and brochures and to make a prayerful, thoughtful response. Now, we could take all returned response forms for granted, a duty done; but we shouldn't. When people don't respond we could shrug our shoulders in indifference, frustration or anger; but we shouldn't. When response forms ask for information about the Parish Giving Scheme, we could email information or catch folk by chance in church, but we shouldn't.

We must respond personally and promptly on receipt of response forms. Otherwise we risk two negative effects.

The first is to devalue the prayerful response of the church member by failing to acknowledge and *appreciate* promptly.

The second negative effect is to increase the chances that people's best intentions will not be translated into positive action. So, in follow-up:

- Within **one week** and ideally within a few days send a personal thank you letter to everyone who returns a response form.
- Within **two weeks** of the closing date for replies we courteously write again to all non respondents.
- Within **three weeks** of receiving the response form we arrange a personal visit to everyone who has requested additional information, such as a Gift Aid declaration. On this visit, see below.

Administration

Effective administration is important. Poor record keeping, missed visits or the wrong literature can backfire in the short and long term. Research suggests that trust in leadership around money is correlated with higher levels of giving.² Good follow-up is a small but important part of trust building whilst poor practice can be corrosive of confidence and shape perceptions of the stewardship practice in the church.

There is an initial administrative task in preparing information request literature; see Information Requests Literature below. When responses come in three steps must be taken.



- The person named on a reply envelope or as the recipient of a reply email should open and record the details of response form.
- Each response is recorded against the list of letters sent: a) the date the response was received - a thank you letter is sent within one week; b) the level of a pledged increase in giving; c) any information requests such as the Parish Giving Scheme or Gift Aid etc.
- Individual giving pledges are confidential but keep a running total. For example, after one week responses pledge an additional £97 per week. This running total should be reflected in the thank you letters and the non response letters. It can also be shared on social media as good news.

Authorship

Be careful with the authorship of the thank you letters and the reminder letters to non responders. In most cases clergy sign the original ask letters to church members. However, the name on the response envelope or the recipient of response emails or any online response forms is very likely someone else: a lay leader such as the planned giving officer or the chair of a stewardship committee. This person will know the details of each pledged increase.

Now, both the thank you letter and any reminder come from the clergy who wrote the initial ask letter. Whether clergy should know church member giving is much contested, a debate for another time.ⁱⁱ For now we note that generally clergy don't open individual responses or know pledged amounts. So the letter of thanks includes a line stating that the clergy are aware of the overall response but not the details. The reminder letter also refers to the details of responses being held by the named lay leader.

The personal follow-up visit

Wherever humanly possible a personal visit should be made to all who request information in their response forms. Don't catch people with requested information leaflets as they chat over coffee - unless you agree that in advance. Resist the temptation to get the job done quickly by email unless there is no choice. Don't confuse appreciation and information requests. Never add leaflets to the thank you letter. Follow-up is about appreciation of the giver and the value of personal relationships. You cannot communicate this in a rushed encounter at the church door.

A giving pledge or a request for information about giving can represent a subtle but important shift in the relationship of the giver to their church and in

their faith. We may never know the story behind the request but a personal response is always helpful.

Personal follow-up visiting may require a small follow-up visiting team and a little training. Guidance on this can be found at the [Visitor Training](#) tab.



Information request literature

The follow-up administrator will prepare simple literature for those who have requested information. Generic and customisable leaflets are provided under [Responding to Requests](#).

Follow-up information leaflets must be downloaded and ready as email attachments or for hard copy printing. Churches have the option to customise the generic leaflets using the online Canva templates. Remember to include the name and contact details of the church officer who leads on the Parish Giving Scheme, on or Gift Aid or the Parish Legacy officer and so on. Electronic files may be uploaded to the church website.

Notes and Resources

i Sharing a common root the analogy of the Triple A rating has been differently applied by Stewardship as Attitude, Administration & Accountability. See the excellent church finance resource, [Raising the Standard](#)

ii *Money Matters: personal giving in American churches* by Hoge et al (1996) p 163- 176