BACK TO CHURCH WEBINAR

Key Points & Practical Takeaways

How to assess, engage, retain, and grow people through generosity data and intentional discipleship.

Central idea: Giving data represents people, not transactions. The goal is to use those insights to better shepherd, engage, and disciple people.

1 Generosity should be viewed as discipleship, not fundraising

The central message is that giving data represents people, not transactions. Use generosity insights to better shepherd, engage, and disciple people.

2 Use data to understand the health of your church

Do not stop at attendance and total giving. Look at the movement behind the totals and use it to build actionable workflows.

- How many new givers you are acquiring
- How many are being retained
- Giving per household and giving trends
- Churn and movement between giving segments
- Demographic trends and who is increasing or decreasing

3 New giver retention is a major opportunity

A first gift should be treated as the beginning of a relationship, not the completion of a transaction. Pay close attention to people who do not make a second gift, not only those who do.

Benchmark: In one webinar example, 85% of first-time givers had not made another gift after four months.

4 Build an intentional New Giver Journey

Churches should have a documented process that moves people from first-time giving toward consistent generosity.

- Thank them personally and create an opportunity for dialogue
- Educate them about biblical generosity
- Reinforce the church's mission and vision
- Help them understand what the church wants for them, not simply from them
- Use an ongoing communication journey, such as a six-week email series

5 Know your churn

Churches should know who is staying, leaving, increasing, decreasing, upgrading, and downgrading. Churn is a silent disruptor because it can be hidden by overall growth.

Benchmark: A webinar analysis found that only about 50% of a 2022 giver cohort was still giving in 2025. Millennials and Gen Z were the most transient segments in that analysis.

6 Core givers are your “best friends”

Core givers are generally more established, connected, serving, and involved in community. They represent an important group to disciple toward deeper generosity.

- Identify people with both the desire and capacity to grow
- Create intentional next-step conversations
- Track retention, churn, and movement into the top-giver segment

Benchmark: Suggested benchmarks: core giver retention above 75%; at least 10% growth from core givers into the top-giver category.

7 Top givers need a strategy too

Top givers are often among the church's most loyal and committed supporters. They understand the mission and want to see how generosity advances ministry.

- Track growth in the number of top givers
- Monitor increasing versus decreasing giving
- Measure retention
- Understand capacity and demographic indicators
- Know their individual stories rather than treating them as a financial category

Benchmark: Suggested benchmark: top-giver retention above 80-85%.

8 Continually communicate the vision and impact of giving

Because giver populations turn over significantly, churches cannot assume people understand why the church teaches generosity. Develop a clear case for support that connects giving to mission and ministry impact.

- What God is doing through the church
- Where resources go
- What ministry generosity makes possible
- Local, national, and global impact

9 Improve database hygiene and segmentation

Age, address, contact information, and other demographic data matter because they allow churches to communicate more appropriately with different groups. You cannot build an effective segmented engagement strategy if you do not know who is in your database.

10 Older and wealth-capable givers need different education

Churches often teach primarily about giving from income, while much of an older giver's financial capacity may exist in stored wealth and assets. This requires a different generosity journey.

- Appreciated assets and stock
- Estate gifts
- Donor-advised funds
- Multi-year gift stacking
- Charitable gift annuities
- Charitable remainder trusts

11 Different generations require different strategies

Do not communicate with a first-time giver the same way you communicate with a 75-year-old who has been part of the church for 20 years. For Millennials and Gen Z, capacity can be a significant issue, and mentoring and modeling generosity may be especially important.

12 The overall framework: Assess → Engage → Retain → Grow

Build intentional generosity pathways that move from data to discipleship.

- Assess your data
- Identify who needs attention
- Engage them personally
- Educate and disciple them
- Retain them
- Help them grow in generosity

THE BIG IDEA

Do not simply grow giving. Grow generous disciples.

Every giving segment should have its own defined journey, goal, communication strategy, and measurement for success.

Source: MortarStone “Back to Church” webinar transcript