



THE NEXT SUNDAY PODCAST SUMMER SESSION
WITH JIM SHEPPARD & FRANK BEALER



THE WORKBOOK

BEYOND THE GENEROSITY GAP

PREPARING THE SOIL FOR A FRUITFUL GIVING SEASON

HOW IT WORKS

One workbook. Five sections. One goal.

The goal is to arrive at fall having already prepared the soil for a fruitful giving season. Read each section before the corresponding episode, then return to it after. The questions will sharpen what you hear, and what you hear will deepen the work.

Each section moves through three movements.

REFLECT These are honest questions designed to help you see things clearly before you try to change anything.

ASSESS These are questions to help you evaluate where your church is right now across the specific area that the episode addresses.

ACT These are concrete, specific steps to take before the next episode, that are designed to help you prepare well for the fall.

Work through this alone or bring your leadership team into the conversation. Some sections will be most useful as personal reflection. Others will open up exactly the kind of honest conversation your team needs to have before September.

A WORD OF CAUTION

Resist the temptation to move quickly. Treat this as a formation practice, not a planning exercise. The summer is the window. Use it well.

A THEOLOGICAL FRAME

Readiness is cultivated, not conjured.

Before you begin, it helps to know what you are actually working toward. In 2 Corinthians 9:7, Paul writes that God loves a cheerful giver. It is one of the most quoted lines in conversations about generosity, and one of the most misunderstood.

GREEK · HILARÓS

Two co-equal meanings: **joyful** and **ready**. A cheerful giver is not simply a happy giver. A cheerful giver is a prepared one.

Paul uses the word *ready* five or six times in the verses immediately before that line. His intent is clear. Most churches spend the fall trying to produce that readiness on a short timeline. This workbook is built on a different premise: readiness is the fruit of formation, honest reflection, genuine assessment, and intentional action taken before the calendar creates urgency.

That is what these five sections are for. Not to help you run a better campaign, but to help you prepare the soil so that when the season arrives, something is already growing.

01

The Mirror Nobody Wants to Look In

REFLECT

When did you last genuinely examine your own relationship with money, not as a pastor preparing a message, but as a disciple?

Is your theology of generosity settled and convicting, or do you find yourself softening it, apologizing for it, or avoiding it?

When trusted voices speak into this area of your life, are you genuinely receptive? Or do you find yourself explaining why their counsel doesn't quite apply to your situation?

Jim describes leaders who keep going around the roundabout rather than driving through the intersection. Where are you going around rather than through?

THE MIRROR NOBODY WANTS TO LOOK IN

ASSESS

Pastoral formation self-assessment across three dimensions.

Can you preach on generosity with the same conviction and clarity you bring to prayer, scripture, or any other core spiritual discipline? Or does something shift when the topic turns to money?

Are you entering this season with energy and conviction, or with depletion and avoidance? What is the honest answer?

Who in your life speaks honestly into your relationship with money and stewardship? When did you last genuinely listen to them?

THE MIRROR NOBODY WANTS TO LOOK IN

ACT

Name the one unresolved tension in your own relationship with money that is most likely to limit your leadership this fall.

Commit to a personal generosity goal for yourself in this season (this is not a goal for your church).

Identify one person you will invite to speak honestly into this area of your life before September arrives.

02

Why It Feels Harder Than It Used To

REFLECT

What have you been sensing about generosity in your church that you have not yet named out loud to yourself, to your team, or to anyone?

Where have you been reading false signals as good news? What has hitting the budget been concealing about the actual formation depth of your congregation?

Is generosity in your church a discipleship issue that is taught and cultivated consistently or something that surfaces mainly when the church has a financial need?

WHY IT FEELS HARDER THAN IT USED TO

ASSESS

A giving culture diagnostic across four indicators.

What percentage of your congregation gives consistently? Do you actually know? When did you last check?

Who is carrying the weight of giving? Is that picture sustainable, or is an older generation quietly propping up a formation gap in younger families?

Pull the last three giving communications your church sent. Were they transformational, inviting people into worship and discipleship, or transactional, focused on what the church needs?

Outside of campaign season, where in your regular teaching and formation rhythms is generosity addressed as a spiritual discipline?

WHY IT FEELS HARDER THAN IT USED TO

ACT

Name one specific change in language, teaching, or how you read your giving data that you will make before fall.

Take the Generosity Scorecard before your next leadership team meeting and bring your results into the conversation.

RESOURCE

The Generosity Scorecard

A free 5-minute assessment of your church's giving culture across five areas: culture, communication, leadership, offering moment, and teaching. Take it before the Assess step and bring your results into the conversation with your team.

generis.com/scorecard →

03

Starting Strong

REFLECT

How has your church historically treated the fall campaign, year-end giving, and the new year launch? As one connected rhythm or three separate events?

Where does the energy run out? Where does your congregation arrive depleted rather than ready?

Jim and Frank introduce two ancient questions: Cain's (*how much can I afford, how much does my church need?*) and Abel's (*what does the Lord require of me that I might worship him well?*). Which is your giving communication leading your congregation to ask?

The week between December 25 and January 1 is one of the highest giving windows of the year. Does your church have a plan for it?

What does your church communicate in January about giving, and does it feel like a continuation of something, or a cold start?

STARTING STRONG

ASSESS

A second-half narrative audit.

Do you have a single story thread that carries from September through February? Or does the narrative reset with each season?

At what point in your current plan does the communication shift from transformational to transactional? Is that the right place?

Pull last year's annual giving statement. Read the cover letter. Does it cast vision, invite response, and connect the giver to the mission or does it confirm the gift and close the loop? What would it look like if it were the most strategic piece of communication your church sends all year?

ONE STORY, TWO MOMENTS

ACT

Draft the single narrative thread that will carry your congregation from fall commitment through year-end giving and into a strong new year launch. Write it in one paragraph. If you cannot, that is the gap to address.

Make a timeline, mapping out the key communication moments across the full arc, including the giving statement and January outreach, as part of one cohesive plan.

Identify where the current plan loses momentum and name one specific change that would extend it through February.

RESOURCE**The Generosity Calculator**

Use the Generosity Calculator to get a clear picture of your church's current giving relative to its actual potential. Built on attendance data and community demographics, it shows you where you are and what is possible with the right formation and discipleship in place.

generis.com/generosity-calculator →

04

The Generation Nobody's Discipling Into Generosity

REFLECT

Frank describes "checkomatic giving": automated digital giving that, while convenient, has removed generosity from everyday family life and eliminated the discipleship moments that once happened around the kitchen table. Is that pattern showing up in your church? In your own home?

Is your church intentionally discipling Gen Z into generosity, or assuming it will happen on its own?

Jim traces the pattern: Boomers didn't disciple Gen X well here. Gen X didn't disciple Millennials well. Millennials have not yet disciplined Gen Z well. Where does that pattern show up in your church? And where does it stop?

Deuteronomy 6 is clear: the deepest discipleship happens at home. What is your church doing to equip parents to carry generosity formation there?

THE GENERATION NOBODY'S DISCIPLING

ASSESS

A generational generosity audit across three areas.

What does giving participation look like among your Gen Z members? Not the dollar amount, but the willingness. Do you know?

Is the way your church talks about and structures giving genuinely accessible to Gen Z? Or is it built entirely around another generation's formation experience they do not share?

Is generosity being taught to the children and students in your church in ways that will form Gen Alpha before the window closes? Who is responsible and have you checked lately?

THE GENERATION NOBODY'S DISCIPLING

ACT

Look at your giving participation data by age range. What does it tell you about where discipleship is happening and where it is not?

Identify one specific way to adjust your second-half giving narrative to genuinely include Gen Z in language, in structure, or in invitation.

Equip one ministry leader or parent-facing pastor with a practical conversation starter to begin discipling generosity in families before fall arrives.

05

What “Ready” Actually Means

REFLECT

Is your congregation being formed toward readiness or are you managing their reluctance? If you are not sure, listen to how you talk about giving on a Sunday morning. The answer is usually there.

Jim notes that most pastors worry more about people giving under compulsion than giving reluctantly, but reluctant givers are far more common. Where do you see reluctance? And where have you been accommodating it rather than addressing it?

What would it look like for your congregation to arrive at September already leaning in with willing minds, willing hearts, and willing spirits, before the first ask is ever made?

Who else in your church is communicating about money and generosity? Are they coming from the same posture you are working toward, or the same avoidance you are trying to move past?

WHAT "READY" ACTUALLY MEANS

ASSESS

A second-half readiness checklist. Mark each one honestly. The gaps are the work that remains.

- Pastoral health.** Have you done the interior work from Section 1 that makes genuine leadership here possible?
- Formation depth.** Has your congregation been taught generosity as a spiritual discipline in regular teaching, not just campaign season?
- Narrative clarity.** Do you have the single cohesive story from Section 3 that carries the season from fall through the new year launch?
- Generational inclusion.** Have you taken the steps from Section 4 to bring Gen Z into the arc and begin the pipeline work for Gen Alpha?
- Communication posture.** Does your giving language (Sunday morning, email, social, the giving statement) cultivate readiness and joy, or apologize for the ask?

WHAT "READY" ACTUALLY MEANS

ACT

The final action plan. Using the key decisions from all five sections, write a clear picture of what you will do differently this second half.

Review your giving communication posture with your team. Where does the language need to shift from managing reluctance to cultivating readiness?

The closing question. By December 31, what do you hope is true about your congregation's relationship with generosity that is not true today?

CLOSING NOTE

You made it to the end. That means something.

This means something because the leaders who will lead their churches into genuine generosity this fall are the ones who were willing to sit with hard questions in the summer. You did that. The work you have done here is not separate from the ministry you will do in September, October, and December. It is the foundation of it.

We want to leave you with a picture Jim and Frank returned to in the final episode. In Exodus 35, Moses invited the people of Israel to give toward the building of the tabernacle. He did not pressure them. He did not remind them of the budget shortfall. He simply extended the invitation to those who were willing, and then something extraordinary happened. The people kept coming. They brought more than was needed. The artisans had to leave their work and go to Moses with a problem nobody anticipated: *tell them to stop. We have more than enough.*

That is not a story about a successful campaign. It is a story about a people who had been discipled and whose hearts were ready before the invitation to give was ever made.

That is what we want for your church. Not a better campaign season. A ready congregation. One whose generosity flows from formation, from worship, from a settled conviction that everything they have come from God's hand and can be released back to his purposes with joy.

The preparation you have done this summer is real. Trust it. And go lead your people well.

WANT TO GO DEEPER?

The conversation doesn't have to stop here. Every episode of the Next Sunday Podcast is designed to help you lead with greater clarity, conviction, and generosity.

[generis.com/podcast](https://www.generis.com/podcast) →