

CREATING A PLANNED GIVING PROGRAM



A number of important steps are necessary to implement before a parish can say it has an effective planned giving program.

1. The parish needs to have a mission and ministry plan that reflects its community membership which is well known and communicated by both clergy and lay leadership.
2. The parish needs to have an active Stewardship Committee which has a comprehensive year-round stewardship plan in place which is approved and supported by clergy, wardens and the parish council.
3. A subset of the Stewardship Committee is a small group (3 or 4) that focusses on Planned Giving. This group's mandate is part of stewardship and their work should be integrated into the overall year-round stewardship plan. This work is not a life sentence. Renewal of membership is important and should happen regularly to ensure that the committee continues to be vibrant and excited about its work.
4. There are three needs for money gifts in a typical parish: annual operating funds; from time to time, capital to upgrade or renew buildings; and legacy gifts which are often permanently endowed funds. This later area is where the Planned Giving Committee does most, but not all of its work.
5. The parish, on the advice of the Planned Giving Committee, should adopt a Gift Acceptance Policy. This policy typically sets out the types of gifts the parish is prepared to receive, what happens to large bequests (restricted or unrestricted), sets up an endowment fund, etc. It is always better to have thought through the handling of various gift situations before the "big-one" arrives and no procedures are in place. Samples are available from the Diocesan office.
6. If the parish decides to establish an endowment fund it is best to create some policy around that as well, including the election of trustees, opening of bank accounts, etc. Samples are available from the Diocesan office.
7. The Planned Giving Committee needs to recruit a team of allied professions who can offer advice and support to gift-givers who need financial advice.
8. Receiving legacy gifts, all gifts really, require regular communications about the needs, the giving options available and the benefits of giving this way. This communication plan should include brochures, bulletin reminders, guest speakers and seminars, personal testimony from gift-givers and regular celebrations of the successes of the Planned Giving Committee. There should also be a "Planned Giving Centre" in a high traffic area of the church building where information is available and updated frequently.
9. Planned giving must be integrated with regular giving to the parish. There should be checkboxes on annual pledge cards where gift-givers can request planned giving information or indicate they have made a bequest in their will.
10. The success of your planned giving program starts with you. Do you have a current will? Lead by example and ensure that you have a current and up-to-date will that includes a bequest for your parish, the diocese or the national church.
11. On a regular basis, the planned giving program should be reviewed to ensure it is still operating effectively to the benefit of the parish and gift-givers.
12. If you need help with this work, the diocese can help. Please contact the Director of Stewardship & Gift Planning (see below).