

Choosing a Planned Giving Shepherd

Leadership Webinar

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What is the Episcopal Church Foundation (ECF)?

Overview:

- Independent and lay-led foundation
- ECF's mission is to strengthen the **leadership** and **financial** capabilities of Episcopal congregations, dioceses, and other institutions
- ECF carries out this mission through a wide array of programs including...



Leadership Resources

- ECF Vital Practices (ecfvp.org)
- Vestry Resource Guide
- Fellowship Partners Program
- Educational Events
- Vital Teams

Financial Resources

- Vision and Strategic Planning
- Capital Campaigns
- Planned Giving
- Endowment Management
- Annual Giving/Stewardship

What are Planned Gifts?



Planned gifts are a variety of charitable giving methods that allow the donor to express his or her personal values by integrating charitable, family and financial goals.

What is special about Planned Giving?



- Future focus
- Donor passion
- A planned gift raises the institution to the level of family in a person's estate plans
- Sensitivity to individual needs, estate planning and end of life issues
- Building trust & sustaining awareness

Promoting Planned Giving



For all levels of a PG program:

- Awareness
- Basic understanding of the “why’s” & “how’s” of planned giving
- Competition from other charities

PG Resources from ECF

- Funding Future Ministry
- PG Booklets & Brochures
- Life Income Gift Illustrations
- Planned Giving Sponsored Website for Donors www.episcopalgifts.org
- NEW RESOURCE:
 - ***Planned Giving on Demand***



What is *Planned Giving on Demand*??

- **A toolkit that empowers leaders!**
- **Learn at your own pace**
- **Everything you need in one place**
- **Consider joining ECF new national network of PG Shepherds**

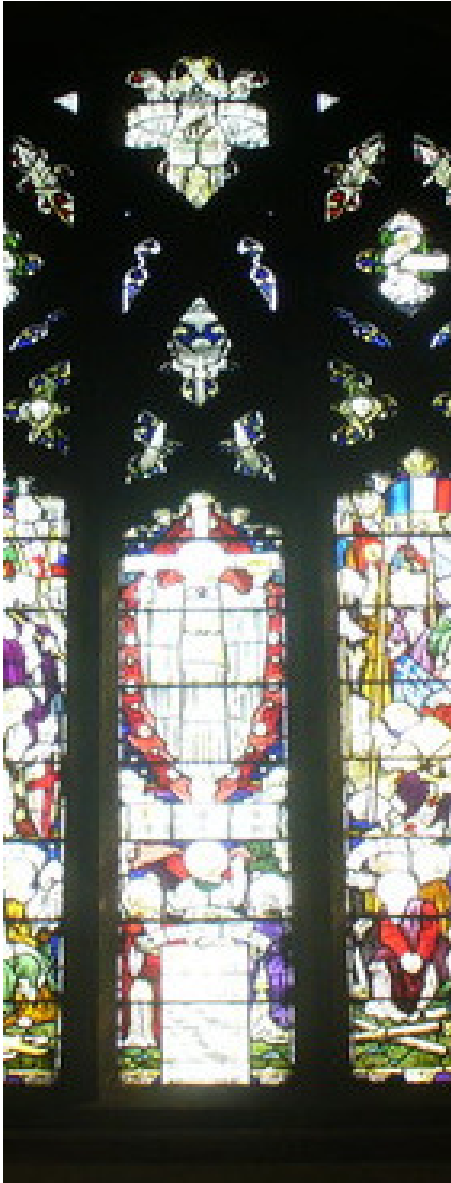


Qualities of a Planned Giving Shepherd

- **Type A personality preferred**
- **Has made a planned gift**
- **Respected in congregation**
- **Willingness to learn**
- **Willingness to collaborate and educate others**
- **Time to focus on moving efforts forward**

Who shouldn't be your Planned Giving Shepherd

- **Your Rector**
- **Normally not: Churchwarden or Treasurer**
- **Normally not: Finance Committee
or Endowment Fund Chair**



Asking your PG Shepherd to serve

- Are you looking in the mirror?
- Be clear about commitments
- Confirm that they willing to guide and teach others, especially other PG leaders?
- Time frame of service and training on next PG Shepherd

What your PG Shepherd should do first?



Be Pro-Active

- Listen to webinars and encourage others leaders to view as well
- Seek out additional Planned Giving volunteers
- Contact ECF as needed
- Move leaders to create/review Endowment & Gift Acceptance Policies (available from ECF)

What to do next?

- Using Pg. 445 BCP

The Minister of the Congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families, and of all persons to make wills, while they are in health, arranging for the disposal of their temporal goods, not neglecting, if they are able, to leave bequests for religious and charitable uses. (BCP pg. 445)

What to do next?

- Encouraging your Rector to use Pg. 445 BCP
- Begin sharing information with parishioners/leaders
- Should you do a 'Quick Start'?

Quick Start Article

Starting Planned Giving from Scratch

What's the sure-fire way to set up a planned giving effort from scratch in any congregation? There's no magic bullet. I've worked with congregations all across the country, and I've learned that each is unique. However, there are some basic steps that should work for almost any Episcopal faith community:

Choose your Shepherd: Appoint and empower at least one leader to oversee your effort.

Empowered and appropriate leaders are essential for success in every ministry. Your planned giving ministry is no different. Here are some things to keep in mind:

- Your PG shepherd (and yes, you can choose more than one) should be knowledgeable about your congregation, its history and ministries, and care deeply about its future.
- She/he should be responsible, trustworthy, discreet, well-respected, and happy to work with others.
- Your PG shepherd does NOT need to be a professional fundraiser, financial consultant, or lawyer. However, your shepherd should be willing to learn the basics about planned giving.



Basic steps for starting a planned giving program for your congregation.

What to do next?

- Encouraging your Rector to use Pg. 445 BCP
- Begin sharing information with parishioners/leaders
- Should you do a 'Quick Start'?
- Encourage Vestry to know more
- Begin forming a PG Committee

PG Shepherd should focusing on planning.....

- Build up others on PG Committee
- Consider events for the parish
 - Final Affairs Fair
 - Adult Forums - Using the 'Donor Webinar'?
 - Testimonials and initial correspondence
- Begin planning for the Legacy Society

Questions??

Recorded Webinars to Empower your Leaders

- Basics of Planned Giving for Parish Leaders
- Basics of Endowment Management for Parish Leaders
- Prospective Donors of Planned Gifts
- Basics of a Capital Campaign
- Annual Stewardship
- Vestry Leadership 101

For links to recordings visit: www.ecfvp.org



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