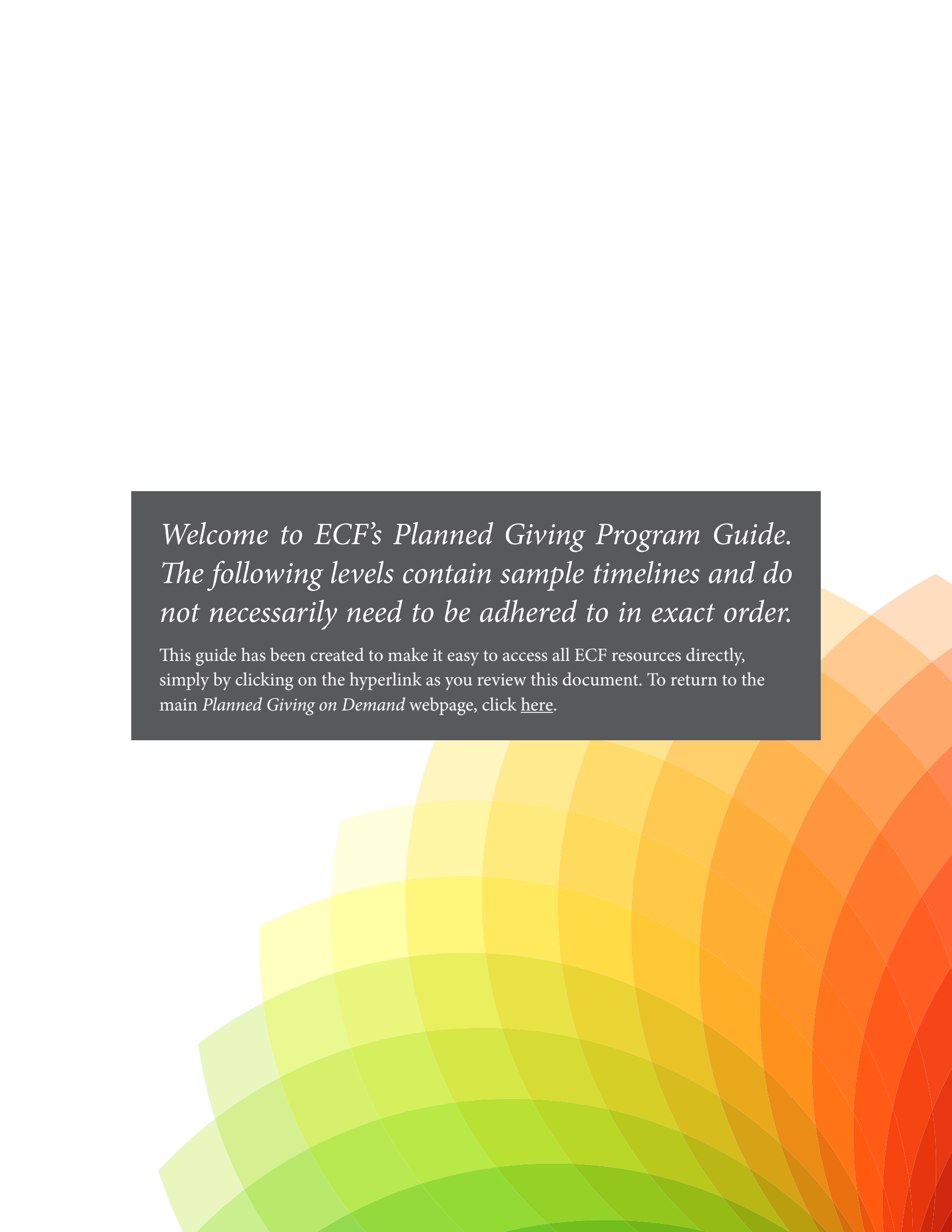


PROGRAM GUIDE

A Planned Giving on Demand guide to launch and sustain a planned giving program in your church

- **LEVEL 1:
GETTING
STARTED**
- **LEVEL 2:
BECOMING
PRO-ACTIVE**
- **LEVEL 3:
MAINTAINING
CONTACT**
- **LEVEL 4:
CREATING AN
ON-GOING
PROGRAM**
- **LEVEL 5:
LEGACY
SOCIETY
STAGE**



Welcome to ECF's Planned Giving Program Guide. The following levels contain sample timelines and do not necessarily need to be adhered to in exact order.

This guide has been created to make it easy to access all ECF resources directly, simply by clicking on the hyperlink as you review this document. To return to the main *Planned Giving on Demand* webpage, click [here](#).

● LEVEL I: GETTING STARTED

This level is appropriate for congregations that are just beginning a Planned Giving (PG) effort.

Although the suggestions below are passive, they may well produce gifts by simply raising awareness.

ECF Resources for Level I:

- **Book:** *Funding Future Ministry*
- **Article:** *Starting Planned Giving from Scratch*
- **Brochure:** *Planned Giving: Stewards of God's Bounty*
- **Booklet:** *Planning for the End of Life*
- **PG Brochure & Booklet Series:** ECF Planned Giving Brochures and Booklets
- **Webinars:** *Basics of Planned Giving*
Making a Planned Gift to Your Congregation (for donors)

PG Volunteer needed: A person who will shepherd the PG program and serve as the contact.

HOW TO BEGIN:

- I** Ask the rector to speak about the importance of creating a will, and to remind parishioners of the language in the Book of Common Prayer (BCP page 445):

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.

Planning for the end of life can be an empowering event and an important spiritual exercise. *Planning for the End of Life* booklets should be ordered and prominently displayed for all who are interested. Individual donors expressing early interest may view the Donor Webinar.

2 Rector should advise the Stewardship Committee of the upcoming planned giving effort.

3 The vestry should appoint a Planned Giving (PG) Shepherd to initiate the program and to serve as its contact person. The PG Shepherd should then:

- Read Funding Future Ministry and the article called Starting Planned Giving from Scratch
- View the Basics of Planned Giving webinar
- Begin inserting notes about planned giving in bulletins and other appropriate mailings. A suggested tagline: “Have you remembered the church in your will (estate plans)? If you would like to speak to someone about this, please contact (insert name of PG Shepherd, rector, or church wardens).”

4 Order or download and reproduce ECF Planned Giving Brochures and place in tract rack and/or other appropriate locations.

5 Add the following lines to annual pledge cards next to a check off box:

- *Check here if you have already remembered the congregation with a planned gift*
- *Check here if you would like more information about planned giving opportunities*

6 Contact ECF to obtain best practice endowment and gift acceptance documents by emailing giving@episcopalfoundation.org or calling 800-697-2858.

Note: If someone asks for information about making a life income gift (charitable gift annuity, charitable remainder trust, etc.), direct him/her to the Episcopal Church Foundation for further information. ECF is available to help with individual donor questions as well as to support your leaders on all planned giving issues. ECF can be contacted at 800-697-2858 or emailed at giving@episcopalfoundation.org. The PG Shepherd should keep track of all inquiries and responses.

● LEVEL 2: BECOMING PRO-ACTIVE

This level is appropriate for congregations that are ready to become more actively engaged in providing planned giving information and getting a PG program organized. In addition to the PG Shepherd, one other person should be designated to learn more about PG and to begin to educate others.

ECF Resources for Level 2:

- **Brochure:** *Writing Your Will*
- **Booklet:** *Planning for the End of Life*
- **PG Brochure & Booklet Series:** [ECF Planned Giving Brochures and Booklets](#)
- **Webinars:** *Basics of Endowments*
Making a Planned Gift to Your Congregation (for donors)

PG Volunteer needed: The PG Shepherd should begin seeking additional lay volunteers to assist

CONTINUE TO FOSTER AN ACTIVE PG PROGRAM:

- 1 Complete the steps for Level 1.
- 2 The rector/church wardens should assemble a small team to review (or create) your endowment fund policies and guidelines. ECF can assist with this process and can provide samples of best practice documents used by hundreds of Episcopal congregations throughout the Church. Clear, well-publicized policies will enhance trust and confidence and, over time, bring more planned, and other major gifts, to the congregation. Contact ECF about receiving best practice endowment and gift acceptance documents by emailing giving@episcopalfoundation.org or calling 800-697-2858.
- 3 Identify the individuals who have already set up a planned gift for the congregation and who may be interested in talking to others.
- 4 Work with your communication leaders to publicize the program. This can be done by creating a *Planned Giving Corner* in the parish bulletin or on your website, and including a PG article or testimonial on a regular basis.

- 5 Add the ECF planned giving link (www.episcopalgifts.org) to your website and announce that you've done it, then encourage people to learn more about various planned gifts for themselves. The website also provides a way to simulate one type of planned gift, life income gifts, illustrating varying amounts of gifts from several income streams.
- 6 Make the Donor Webinar available for private viewing and/or hold an initial planned giving adult forum to show the donor web conference, and include testimonials from individuals who have already made a planned gift to the congregation.

- 7 Announce (or publicize the existence of) the endowment fund and explain how it is organized, invested, and used. Create an easy to follow handout describing your endowment fund and make it available with other PG brochures and booklets.

Note: The PG Shepherd should keep track of inquiries and responses in the congregation's database for future follow up.

● LEVEL 3: MAINTAINING CONTACT

This level is for congregations ready to increase the awareness of planned giving and able to follow up. It requires additional volunteers who will learn some basic information about PG and who can organize a direct mail effort (A complete set of PG bulletin inserts/articles are in development).

ECF Resources for Level 3:

- **Brochures:** *Pooled Income Fund*
Charitable Gift Annuity
Charitable Remainder Trusts
Planned Giving: Stewards of God's Bounty
- **PG Brochure & Booklet Series:** ECF Planned Giving Brochures and Booklets
- **Webinar:** *Endowment Spending Rules*

PG Volunteer needed: The PG Shepherd should begin seeking additional volunteers who will serve on the PG Committee.

INCREASING AWARENESS ABOUT YOUR PG PROGRAM:

- 1 Complete the steps for Levels 1 and 2.
- 2 Continue to publicize the endowment fund, how it is managed, and purposes.
- 3 Take time at the annual meeting or another major parish gathering to allow for one or two individuals to give testimony about why they made their planned gift to the congregation. Recognize and commend all those who have already made a planned gift (with their permission).
- 4 Make the Donor Webinar, www.episcopalgifts.org, and brochures available as needed.
- 5 Encourage congregational leaders to make planned gifts. Rector should send a handwritten thank you note for each gift.
- 6 Vestry should have completed and approved endowment and gift acceptance policies (based on samples available from ECF); they should now be publicized. These formalized policies

will enhance the trust and confidence of the congregation in its leadership and will likely lead to more planned gifts.

- 7 Order one packet (25 copies) of Planned Giving: Stewards of God's Bounty brochure from Forward Movement.
- 8 Invite 5-10 capable individuals, who have been selected with input from the rector/church wardens, and all of whom should have made a planned gift, to a training meeting to learn more about planned giving, using the Basics of PG Webinar. Include other PG educational materials from ECF and possibly copies of Funding Future Ministry for their review, along with other brochures (printed and e-book versions are available). The packet should include a cover letter that explains the reason for the invitation and the importance of PG to the congregation. Getting your leaders on board early will be key in inspiring the rest of the congregation to witness the importance of this effort and encourage more parishioners to want to take action.

- 9 One month after the meeting, check in with the participants to see if they have questions or need additional information and THANK them for attending, and for their interest.

- 10 Consider a mailing to the entire congregation or a selected group. Include a response card and a copy of the Stewards of God's Bounty brochure with a letter that explains the importance of planned giving to the congregation. Keep a record of the response cards as they come in and send appropriate follow up information with ECF brochures, or if using email, the link to appropriate brochures and booklets. Also, place extra brochures in visible areas.

Note: The PG Shepherd or a designee should track all inquiries and responses in the congregation's database.

● LEVEL 4: CREATING AN ON-GOING PROGRAM

This level is for congregations with multiple leaders who will learn some basic information about PG and promote it in the congregation's publications and special forums. The PG Shepherd can transition into a PG Committee Chair leading other volunteers.

ECF Resources for Level 4:

- **Book:** *Funding Future Ministry**
- **Brochures:** *Stewards of God's Bounty* *Charitable Gift Annuity*
Pooled Income Fund *Charitable Remainder Trusts*
- **PG Brochure & Booklet Series:** *ECF Planned Giving Brochures and Booklets*
- **Webinars:** *Basics of Planned Giving*
Basics of Endowments

Make the Donor Webinar available on the congregation's website

PG Volunteer needed: The PG Shepherd (Chair) should begin seeking additional volunteers who will serve as the initial members of the PG Committee.

* All committee members should have read *Funding Future Ministry* as background.

A MONTH-BY-MONTH APPROACH TO A PG PROGRAM (BUILDING ON LEVELS 1-3):

Month 1:

- Create a PG Committee. Determine who will be responsible for responding to inquiries and educate them to be able to speak generally about planned giving (use ECF Webinars and *Funding Future Ministry*).
- With the help of the PG Committee, generate a list of prospective participants.

Month 2:

- Ask the rector to speak to the importance of creating a will, reminding parishioners of the language in the BCP (see Level 1).
- Announce the PG Program in the congregation's literature, coffee hours, and services, as well as by other means.

- Place an announcement/article in newsletter/ bulletin, stressing the importance of planned giving as a means of supporting valued ministries—list several examples of your ministries that would be supported.

Month 3:

- Using material from the PG Article download Level 1, place your first life income gift article in the newsletter.
- Make response cards available for potential donors who would like more information and respond promptly to any inquiries with appropriate brochure or link.
- Set and announce a date for an estate planning seminar. If your parish has attorneys or financial planners who understand they are volunteering their time and NOT promoting their own business, they could lead a session on basic estate planning and make use of ECF's *Planning for the End of Life* booklet. Keep a record of attendees for future follow up. Each attendee should receive a copy of the *Planning for the End of Life* booklet.

Month 4:

- Place another planned giving article in the newsletter.
- Order enough copies of the basic PG brochure, *Stewards of God's Bounty*, to distribute to potential donors (see note on mailing in Level 3, item 10).
- Using the list generated in Month 1, begin a direct mail effort; send a cover letter and the PG brochure, *Stewards of God's Bounty*, to prospective donors.
- Respond promptly to any inquiries, sending appropriate ECF PG brochures.
- Continue planning and promoting estate planning seminar.

Months 5 & 6:

- Place another planned giving article in the newsletter.
- Begin following up or, if appropriate, visiting donors who responded to mailing.
- Hold estate planning seminar, possibly using the Donor Webinar, and personal testimonials.

Months 7 & 8:

- Continue to place articles in newsletter/bulletin.
- Promote and hold a coffee hour to discuss the benefits that ministries supported by PG would receive; have response cards and brochures available.
- Order additional brochures if needed.
- Continue responding to inquiries.

Months 9 & 10:

- Continue to place articles in newsletter/bulletin and continue responding to inquiries.
- Promote and hold a coffee hour devoted to life income gifts (use ECF's Donor Webinar and the testimonials of those who have made the commitment of a planned gift to the parish).

Month 11:

- Evaluate your efforts. How many gifts and/or inquiries have been generated? Which avenues were most effective—coffee hour talks, estate planning seminar mailings?

- Evaluate the impact on the volunteers. How do volunteers feel—over or under worked? Are people enthusiastic about the program or does more promotional work need to be done?

Month 12:

- Create a second year plan. Repeat techniques that worked best. Try new ideas.
- Educate new or additional volunteers as necessary.
- Begin planning a second estate planning seminar.
- Begin planning additional coffee hours.

Note: The PG Chair, with assistance from committee, tracks inquiries and responses.

● LEVEL 5: LEGACY SOCIETY STAGE

12-month planned giving program

This level is for congregations that are ready to educate the parish 1-2 times per year on end of life planning and which have enough volunteers to share leadership of the PG Committee and Legacy Society.

ECF Resources for Level 5:

- **Book:** *Funding Future Ministry**
- **Brochures:** *Pooled Income Fund*
Charitable Gift Annuity
Charitable Remainder Trusts
- **PG Brochure & Booklet Series:** ECF Planned Giving Brochures and Booklets
- **Webinars:** *Endowment Spending Rules*

Make the Donor Webinar available on the congregation's website

PG Volunteers: The PG Shepherd (Chair) should begin seeking additional volunteers who will serve as the initial members of the PG Committee to be convened at a future date.

* *All committee members should have read Funding Future Ministry as background.*

A MONTH-BY-MONTH APPROACH TO A PG PROGRAM AND A LEGACY SOCIETY (BUILDING ON LEVELS 1-3):

Month 1:

- Create a PG Committee. Determine who will be responsible for responding to inquiries and educate them to be able to speak generally about planned giving (use ECF Webinars and *Funding Future Ministry*).
- Select an inaugural date for the Legacy Society's first event and confirm it with the rector and those responsible for the congregation's calendar. This should be done when planning every successive calendar year for a congregation; it ensures that at least one, if not more events, are scheduled each year.

- Generate a list of prospective donors.
- Begin to establish your Legacy Society and use ECF materials and the [ECF web conference on Legacy Societies](#). What are the criteria for becoming a member? What is the theme? How will you recognize members? Be as inclusive as possible when setting up the membership qualifications for your Legacy Society. Normally, you should not require evidence of a planned gift, such as asking for a copy of a will, but focus on building a trusting relationship. However, if individuals reveal that they have made the parish a beneficiary of a life insurance policy, you may ask people for evidence of designation of that as insurance companies may not seek out beneficiaries, but rely on you to contact them.

Month 2:

- Ask the rector to speak to the importance of creating a will, reminding parishioners of the language in the BCP (see Level 1).
- Announce the program in the congregation's literature, coffee hours, services and other forums.

- Draft Legacy Society documents: a brochure including enrollment form, acknowledgement/thank you letters (ECF has samples on the [Funding Future Ministry website](#)).
- Place announcement article in newsletter/bulletin, stressing importance of planned giving as a means of supporting valued ministries—list several examples of ministries that would receive support.
- Continue planning and promoting estate planning seminar.

Month 3:

- Using material from PG Article download (in development), place your first life income gift article in the newsletter.
- Announce name and theme of Legacy Society and invite people to consider becoming founding members.
- Brainstorm ideas for first Legacy Society recognition event; make tentative arrangements.
- Make response cards available for potential donors who would like more information.
- Respond promptly to any inquiries.

- Set and announce a date for an estate planning seminar (Use ECF's Donor Webinar and the testimonials of those who have made the commitment of a planned gift to the congregation).

Months 4 & 5:

- Place another planned giving article in the newsletter.
- Using the list generated in Month 1, begin a direct mail effort; send a cover letter and the Planned Giving: Stewards of God's Bounty brochure to prospective donors.
- Respond promptly to any inquiries and continue planning and promoting the estate planning seminar.
- Continue promoting Legacy Society and founding membership.
- Finalize details for Legacy Society recognition event.

Months 6 & 7:

- Place another planned giving article in the newsletter.
- Begin visiting donors who responded to the mailing.
- Hold estate planning seminar.
- Continue promoting Legacy Society and founding membership.
- Announce date of first Legacy Society recognition event.
- Plan Legacy Society information session/coffee hour (separate from recognition event).

Months 8 & 9:

- Promote and hold a coffee hour to discuss the benefits that ministries supported by planned giving would receive; have response cards and brochures available.
- Order additional brochures if needed.
- Continue promoting Legacy Society and founding membership.
- Hold information session and have enrollment forms available.

Month 10:

- Promote and hold a coffee hour devoted to life income gifts (use [Donor Webinar](#) as previously described).
- Send invitations to Legacy Society recognition event. Invite members to bring a guest who is not in the Society.
- Continue to place articles in newsletter/bulletin.
- Continue responding to inquiries.

Month 11:

- Hold Legacy Society recognition event.
- Follow up promptly with the non-member guests who attended the event; invite them to consider joining.
- Evaluate your efforts. How many gifts and/or inquiries have been generated? Which avenues were most effective—coffee hour talks, estate planning seminary, mailings?

- Evaluate the impact on the volunteers. How do volunteers feel—over or under worked? Are people enthusiastic about the program or does more promotional work need to be done?

Month 12:

- Create a second year plan. Repeat techniques that worked best. Try new ideas.
- Train new or additional volunteers as necessary.
- Begin planning a second estate planning seminar.
- Begin planning second Legacy Society event.

Note: PG Chair and Legacy Society Chair should work with committees to track inquiries, responses, and notices of estate planning.

If you would like additional information or suggestions, contact the Episcopal Church Foundation at 800-697-2858 or email us at giving@episcopalfoundation.org.



475 Riverside Drive, Suite 750, New York, NY 10115
800-697-2858 ■ www.EpiscopalFoundation.org