

Episcopal Diocese of San Diego



This presentation is intended for the Vestry or a group considering establishing a more formal planned giving entity for your parish.



Planned Giving

Does your congregation have a plan?

Planned Giving is more than just a name. It really is intended to be a formal organized method for obtaining gifts AND perhaps just as important, managing, protecting and using the gifts that you receive.

Just a thought, do you have a plan? What is it? Who is in charge of obtaining, receiving, managing and protecting those gifts?

If a gift is given, what do you do?

- We accept any gift?
- We have a committee / person who looks at gift for acceptance?
- We just keep a list of what was given?
- We have an account, and maintain records?
- We have an established plan for dealing with gifts?

Here are some ways that congregations handle gifts.

If you do any of these, is it (are they) sufficient?

Are there other things that ought to be done?

Would doing more, make your givers more confident that their gift would be protected AND used for the reason they intended?

How do you recognize givers?

- We think gifts should be anonymous
- We send a letter thanking the giver
- We have a plan for recognition
- We have a visible way of thanking givers
- We have a legacy society

Some people want their gifts to be anonymous, but some would like some recognition. Some would never say they want recognition, but in truth they are rather pleased when it is given.

Certainly every gift should be acknowledged. Your mother probably insisted that you write a thank you note. SHE WAS RIGHT!!! Men, more than women, have a rather significant shortfall in this area. Nevertheless, “thanks” are always appreciated and need to be given.

A legacy society (by whatever name) is a good way to acknowledge that people have remembered the church, either in current special giving or in some death time plan.

What Kind of Structure

- Form a task force to create a permanent structure
- Formalize leadership's commitment.
- Construct a "well woven basket"
- A board or committee responsible to the Vestry

Creating or forming a legacy society gives you a permanent and regular way of addressing issues of planned giving.

That the vestry endorses the program is not only necessary, but is a visible way of showing the church's commitment to planned giving.

Unless you have some formal structure, planned giving will remain an occasional and generally unaddressed issue. You will be surprised and delighted to receive a gift, but won't really know why it occurred. Having a formal structure won't answer all of the questions, however it is a way of keeping the issue in front of your congregants and reminding them that unless they plan... there will be no gift. There still will be (we hope) those surprise gifts! The objective is that there will be more gifts.

Whose property?

- Endowment funds
- A savings account to protect from uncertainty?
- Or, resources to do the work of God?
- Should they be used for operating budget?
- If not for budget, what for?

There are a number of ways that funds are held. But letting your congregation know their options (or your general intent) certainly provides more openness and likelihood that members will actually make planned gifts (i.e., those other than for the annual operating budget.)

Are there gifts which shouldn't be accepted?

- Probably
- Investigate gifts which are other than cash
- Classic examples: old gas stations, hazardous material dumps, industrial sites
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Cash is always nice. But it certainly isn't the only gift that people give. HOWEVER, just because someone is willing to give a gift does not mean that it is desirable or prudent to accept the gift.

The committee charged with managing planned gifts needs to be able to say no, we simply can not accept that gift. Or, figure out a way that a gift could be accepted, perhaps in some other form.

When do you ask?

- Now!
- If you don't ask, how is one supposed to know you would like a donation?
- How much should one give: "Until it hurts"? or "Until it feels good"?

Planned giving involves asking.

Sometimes general gifts are solicited, sometimes there is a specific program or objective that you would like to seek gifts for. Many people find it much easier to give when there is a specific objective. On the other hand, some people find that "for the growth of the kingdom" is sufficient. You will need to craft any planned giving program or solicitation of the various members for your congregation and the needs of the church.

What kinds of planned giving?

- Outright gifts
- Regular gifts
- Gifts at death
- Pooled income funds
- Charitable remainder trusts
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There are many kinds of gifts, although in truth, regular gifts for the support of your ongoing program while certainly “planned”, are not generally grouped under the topic of “Planned Giving.”

The most frequent and certainly the easiest from the point of view of giver is an end of life gift. It can either be in specific amount (or asset) or as a percentage. But, no matter what kind of gift is given, it should be given taking into consideration the other responsibilities and concerns of the giver. They are not buying their way into Heaven. They are addressing something that has been important in their life.