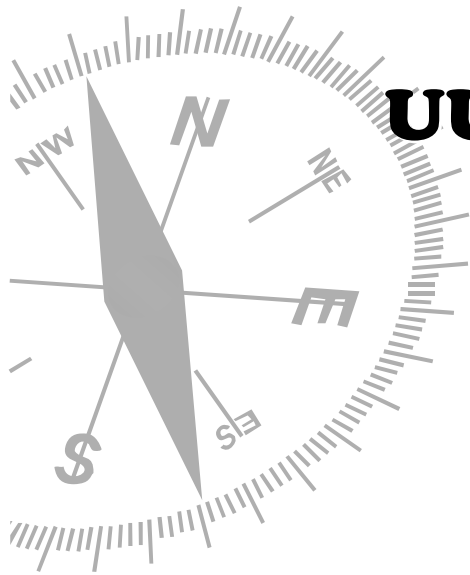


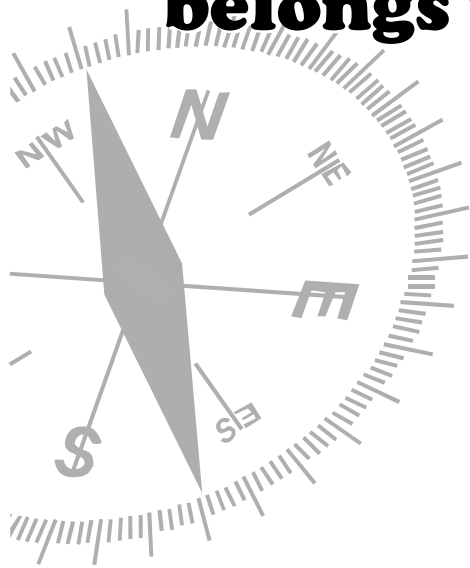
# **Creating a Planned Giving Program**

**with Wayne B. Clark**



**UUA Large Church Conference**  
**Louisville, Kentucky**  
**March 13-16, 2008**

**One of the greatest missing teachings in the American church today is the reminder to men and women that nothing we have belongs to us.**



**—Gordon Macdonald**

# **Workshop Goals**

**1. Present 10 Steps to successful planned giving program**

**2. Allow time for questions and answers**



**Workshop material is excerpted from**

***©Beyond Fundraising:***

***A Complete Guide to***

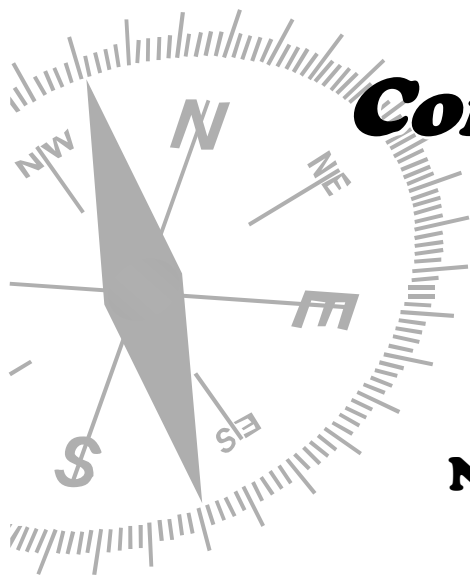
***Congregational Stewardship***

**by**

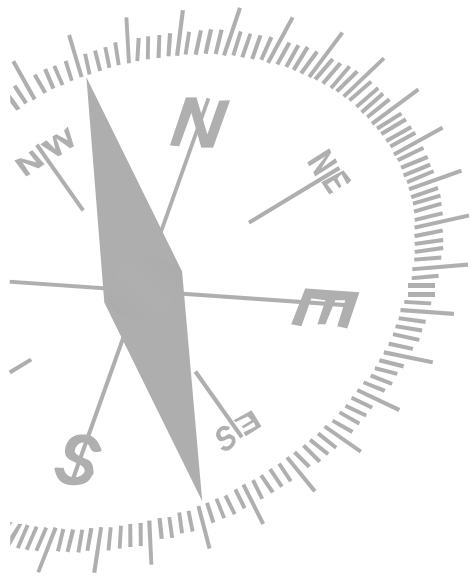
**Wayne B. Clark**

**Now available at [www.uua.org/bookstore](http://www.uua.org/bookstore)**

**and 800.215.9076**



# Accommodations?



# Questions

**Have an endowment fund?**

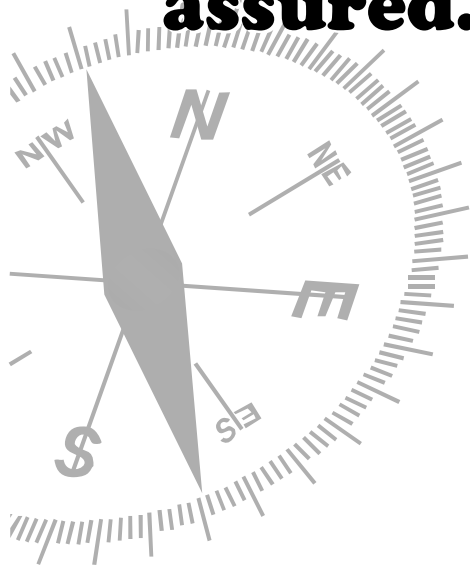
**More than \$500,000?**

**Planned giving plan?**

**Active planned giving program?**



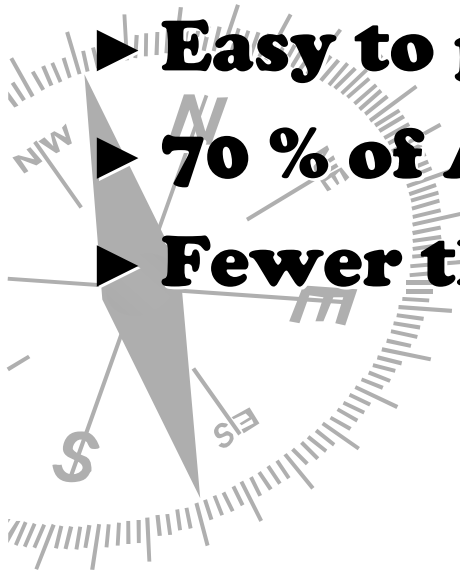
**By providing investment income, the endowment fund becomes the vehicle through which long-term fiscal stability is assured.**



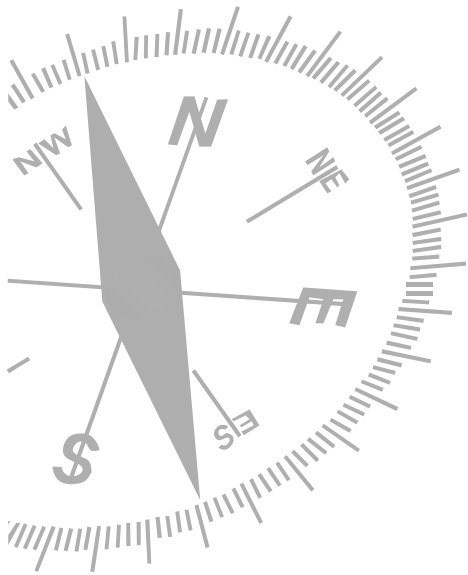
**—Wayne B. Clark**

# Charitable Bequests

- ▶ **Through a legal will or living trust**
- ▶ **Save \$1.00 in estate tax liability for every \$1.00 given**
- ▶ **Easy to promote**
- ▶ **70 % of Americans die without a will**
- ▶ **Fewer than 10% have ever been asked**



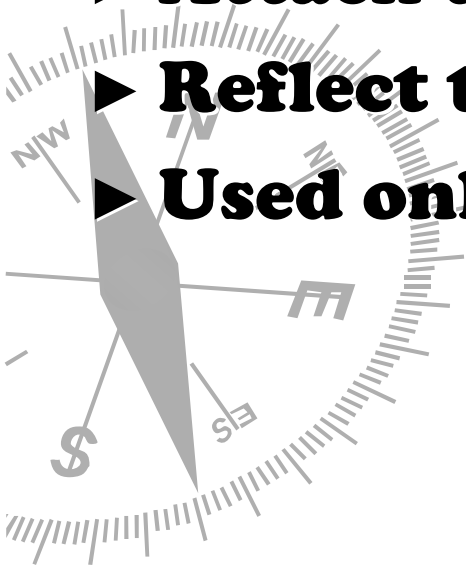
# **10 Steps to Creating a Planned Giving Program**



# Step 1

## Approve the Enabling Resolutions

- ▶ **Define purpose and procedures**
- ▶ **Attach to bylaws**
- ▶ **Reflect timeless features**
- ▶ **Used only as designated by donors**

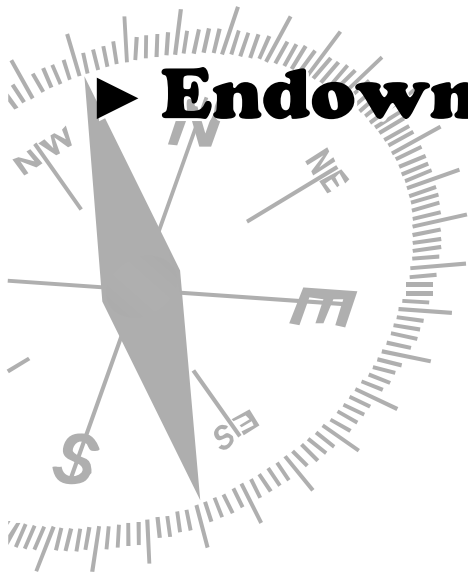


# Step 2

## Establish Committee Structure

▶ **Planned giving committee**

▶ **Endowment fund committee**



# **Step 2 continued**

## **Endowment fund committee**

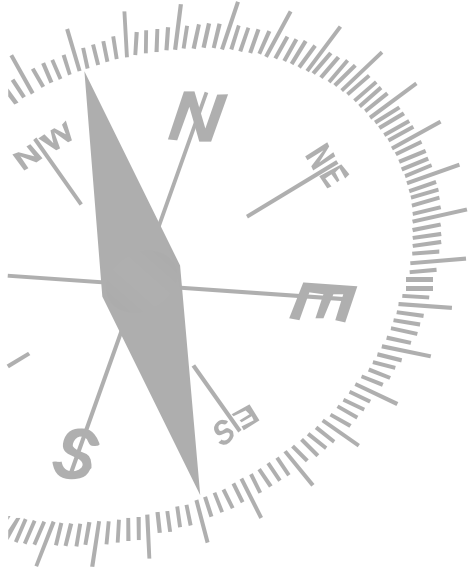
- \*encourage, accept, acknowledge**
- \*honor restricted gifts**
- \*arrange for professional accounting**
- \*report on fund activities**
- \*make investment decisions**
- \*administer the funds**
- \*checks and balances**



# Step 3

## Develop a Mission Statement

- ▶ **Make a clear and compelling case**
- ▶ **Get widespread acceptance**



# Step 4

## Create an Endowment Document

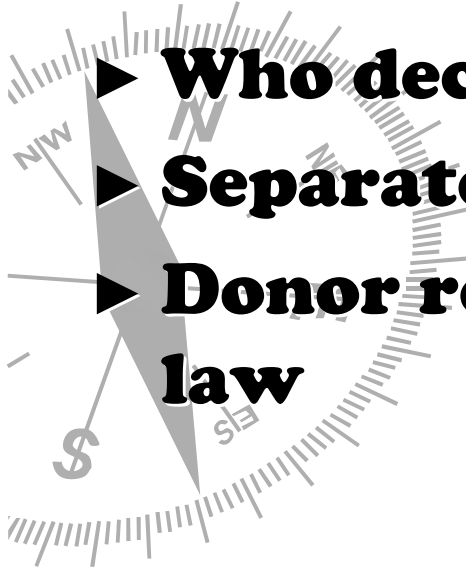
- ▶ **Receive unrestricted gifts**
- ▶ **Types of acceptable gifts**
- ▶ **Review and approve gifts**
- ▶ **Liquidating stocks process**



# Step 5

## Define the Fund

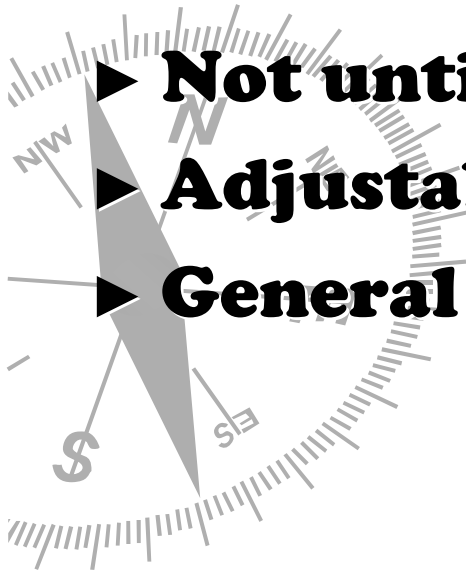
- ▶ **Identify the destination**
- ▶ **How much can be spent**
- ▶ **For what purposes**
- ▶ **Who decides**
- ▶ **Separate and distinct**
- ▶ **Donor restrictions, sound accounting, state law**



# Step 6

## Manage the Fund

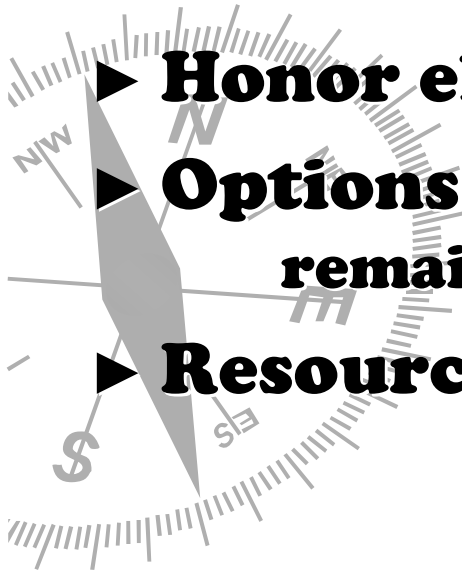
- ▶ **Balance growth and income**
- ▶ **Seek outside advice at >\$500,000**
- ▶ **Distributions: The Harvard Model**
- ▶ **Not until twice operating budget**
- ▶ **Adjustable guidelines**
- ▶ **General concept of prudence**



# Step 7

## Market the Planned Giving Program

- ▶ **Testimonials**
- ▶ **After-worship forum**
- ▶ **Literature rack and bulletin board**
- ▶ **Honor elders**
- ▶ **Options workshop: insurance, charitable remainder trust, will, retirement**
- ▶ **Resource list: legal and financial planning**



# Step 8

## Identify Prospects

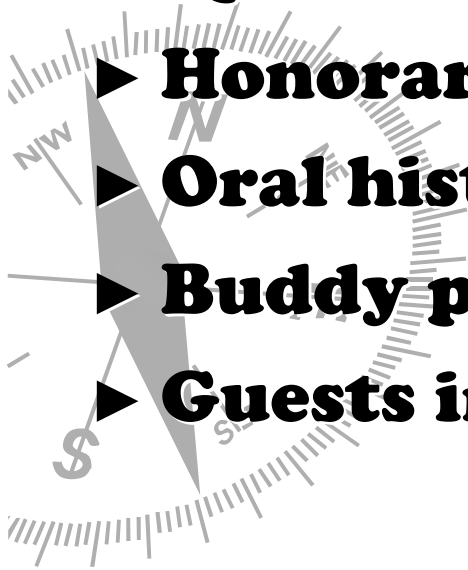
- ▶ **Often over 50, but not always**
- ▶ **Get to know them . . . engage regularly**
- ▶ **Get them involved**
- ▶ **Ask them!**



# Step 9

## Bequest Recognition Society

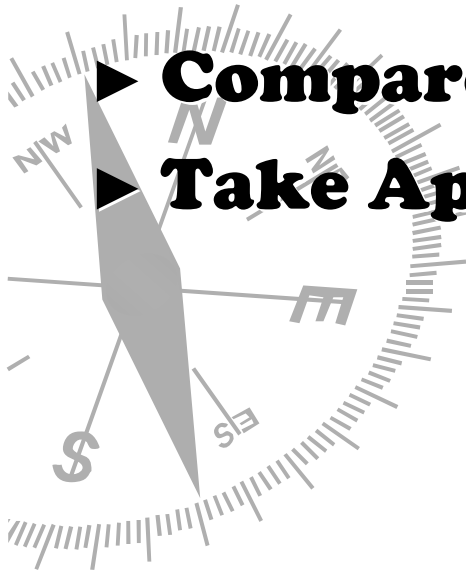
- ▶ **List of charter members**
- ▶ **Recognition wall**
- ▶ **Special events**
- ▶ **Honorary members of ABD team**
- ▶ **Oral history**
- ▶ **Buddy program**
- ▶ **Guests in religious education classes**



# Step 10

## Evaluate the Program

- ▶ **Thorough review every 3 years**
- ▶ **Determine patterns of gifts**
- ▶ **Get feedback**
- ▶ **Compare with other congregations**
- ▶ **Take Appreciative Inquiry approach**



# **Unitarian Universalist Association Congregational Stewardship Services**

**Wayne B. Clark, Director**

**Robin Nelson, Administrator**

**Carole Czujko, CA    Martha Easter-Wells, IA**

**Rev. Tricia Hart, PA    Tamsin Kemos, ME**

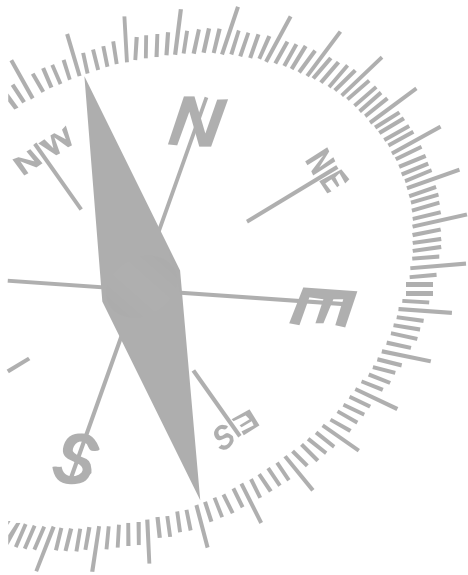
**Frankie Price Stern, NC    David Rickard, AR**

**Aggie Sweeney, WA    Larry Wheeler, NC**

**Barry Finkelstein, NH    Mary Gleason, WA**



**Questions?**



**For more information:**

**[www.uua.org](http://www.uua.org)**

**Click on the Google box**

***congregational stewardship services***



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