

Ten Steps to Creating a Planned Giving Program

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Accommodations?

Burning Questions

Workshop Goals

- 1. Define workshop parameters**
- 2. Start a planned giving program**
- 3. How to revive a moribund program**
- 4. Adhere to a specific sequence**
- 5. Answer all questions**

**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

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 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**
- ◆ **Liquidate 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**

Step 7

Market the Planned Giving Program

- ◆ **Testimonials**
- ◆ **After-worship forum**
- ◆ **Literature rack and bulletin board**
- ◆ **Honor elders**

Step 7 continued

Market the Planned Giving Program

- ◆ **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 stewardship team**

Step 9 **continued**

Bequest Recognition Society

- ❑ **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**
- ◆ **Appreciative Inquiry approach**

Review Workshop Goals

- 1. Define workshop parameters**
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Contact

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