



PLANNED GIVING PROGRAMS

Level 1: “Getting Started”

For a parish that is just beginning a PG effort. Although suggestions below are basically passive, they may well produce gifts from simply raising awareness.

Materials Needed: ECF brochures order here:

www.episcopalfoundation.org/resource-library

Suggested Volunteers: No additional

Suggested Main Contact: The Rector/Churchwardens

What your parish can do:

1. Have the Rector speak about the importance of creating a will, reminding parishioners of the language in the *Book of Common Prayer*. Planning for the end of life can be an empowering event and an important spiritual exercise.

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)

2. Begin inserting notes about Planned Giving in bulletins and other appropriate mailings, including pledge cards. A tagline could be something like: “Have you remembered the church in your will (estate plans)? If you would like to speak to someone about this please contact the Rector or Churchwardens”.
3. Place ECF brochures in tract rack

If someone approaches the rector/vestry about a life income gift (charitable gift annuity, charitable remainder trust, etc.) you could direct the individual to the Episcopal Church Foundation for further information. ECF is available to help with individual donor questions as well as to support your Rector or Churchwardens on all planned giving issues.

*** Rector/Churchwardens should keep track of inquiries and responses.**



PLANNED GIVING PROGRAMS

Level 2: “Becoming Pro-Active”

For a church that is ready to become more pro-active in providing planned giving information and getting organized. One additional person should be designated to learn more about PG and to begin to educate others.

Materials Needed: Brochures from ECF www.episcopalfoundation.org/resource-library and contact ECF for additional resources.

Suggested Volunteers: One PG volunteer

Suggested Main Contact: The Rector/Churchwardens

What your parish can do:

1. Complete steps for Program 1.
2. Create a “Planned Giving Corner” in the parish bulletin; once a month include a PG article (or place on your website).
3. Sign up the PG volunteer and others to receive the free ECF donor e-newsletter.
4. Add the ECF link to your website, where people can investigate Life Income Gifts for themselves and can simulate gift illustrations with income streams.
5. Assemble a small team to review (or create) your endowment fund policies and guidelines. ECF can assist with this process and can provide useful samples. Well-publicized policies will enhance trust and confidence and, over time, bring more planned gifts to the parish.
6. Announce (or publicize the existence of) the Endowment Fund and explain how it is organized, invested, and used.

*** PG volunteer should keep track of inquiries and responses for future reference and follow up.**



PLANNED GIVING PROGRAMS

Level 3: “Making Regular Contact”

For churches with additional volunteers who are willing to learn some basic information about PG and who can organize a direct mail effort.

Materials Needed: See 1 & 2, response cards, initial letter, parish stationery, ECF draft policies for endowments and gift acceptance policies.

Suggested Volunteers: At least 3 volunteers to divide up tasks, in addition to PG Chair

Suggested Main Contact: PG Chair or the Rector/Churchwardens

What your parish can do

1. Complete steps for Programs 1 + 2
2. With the assistance of the Rector/Churchwardens, endowment and gift acceptance policies (samples available from ECF) should be approved and publicized in parish. These policies will enhance trust and confidence in a parish and its leadership, leading to more planned gifts.
3. Order one packet of the “Ministry of Gift Planning” brochure (25 copies). With input from Rector/Churchwardens and PG volunteers, create a list of ten to twenty individuals and send a letter (or use the Foundation’s sample letter) inviting them to learn more about planned giving by returning the response card. Place extra brochures in visible area.
4. As response cards come in, send them to the Episcopal Church Foundation, ECF can send appropriate follow-up information.
5. One month later, check in with the individuals to see if they have questions or need additional information and THANK them for inquiring.

*** PG Chair should track inquiries and responses.**



PLANNED GIVING PROGRAMS

Level 4: “A 12-Month Planned Giving Program”

For churches with multiple leaders who are willing to learn some basic information about PG and to promote planned giving in parish publications and special forums.

Materials Needed: See previous levels and materials for estate planning seminar from ECF

Suggested Volunteers: 5 volunteers or more, including PG Committee Chair

Suggested Main Contact: Planned Giving Committee members, which might include, the Rector or Churchwardens

What your parish can do

Month 1:

- Create a planned giving committee. Determine who will be responsible for responding to inquiries and educate them to be able to speak generally about planned giving (**ECF can assist with training**)
- With the help of the Committee, generate a list of prospective participants.

Month 2:

- Ask Rector to speak to importance of creating a will, reminding parishioners of the language in the BCP.
- Announce PG program in parish literature, coffee hours, and services and by other means
- Place announcement article (**ECF can assist with this**) in newsletter/bulletin, stressing idea of planned giving as a means of supporting valued ministries—list several examples of ministries that would be supported.

Month 3:

- Using material from the Marketing Subscription Service, place your first life income gift article in the newsletter
- Make response cards available for potential donors who would like more information (**available from ECF**) and respond promptly to any inquiries
- Set and announce a date for an estate planning seminar (**ECF can provide suggestions for agenda and types of speakers**)

Month 4:

- Place another planned giving article in the newsletter
- Using the list generated in Month 1, begin a direct mail effort; sending a cover letter and the Ministry of Planned Giving brochure to prospective donors **(ECF can assist with the drafting of this letter)**
- Respond promptly to any inquiries
- Continue planning and promoting estate planning seminar

Months 5& 6:

- Place another planned giving article in the newsletter **(available from ECF)**
- Begin following up, or if appropriate, visiting donors who responded to mailing. ECF can still contact prospective donors if preferred.
- Hold Estate Planning Seminar

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 available, as well as brochures - 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 **(ECF can provide suggestions for agenda and assist speakers, who do not have to have an in depth knowledge of planned giving)**

Month 11:

- Evaluate efforts. How many gifts, inquiries, have been generated? Which avenues were most effective? Coffee hour talks? Estate seminar? Mailings?
- How do volunteers feel? Over or under worked? Are people enthusiastic about the program or does more promotional work need to be done? **(ECF can assist with this assessment)**

Month 12:

- Create second year timeline, using techniques that worked best
- Educate new or additional volunteers as necessary
- Begin planning a second estate planning seminar
- Begin planning additional coffee hours

***PG Chair, with assistance from committee, tracks inquiries and responses.**



PLANNED GIVING PROGRAMS

Level 5: “A 12-Month Planned Giving Program with Legacy Society”

For churches that are ready to educate the parish 1-2 times per year on “Final things” as well have enough volunteers to share leadership of PG Committee and Legacy Society. ECF can help you to customize a schedule to best fit your parish.

Materials Needed: See previous levels and, template for Legacy Society, sample brochure text and other documents from ECF.

Suggested Volunteers: 7 to 8 volunteers, including a Chair for PG Committee and Chair of Legacy Society

Suggested Main Contact: Planned Giving Committee (which may include the Rector) and Legacy Society Chairs

What your parish can do

Month 1:

- Create a planned giving committee. Determine who will be responsible for responding to inquiries and educate them to be able to speak generally about planned giving (**ECF can assist with training**)
- Generate a list of prospective donors.
- Begin to establish your Legacy Society. What are the criteria for becoming a member? What is the theme? How will you recognize members? (**ECF can assist with this**)

Month 2:

- Ask Rector to speak on importance of creating a will, reminding parishioners of the language in the BCP.
- Announce program in parish literature, coffee hours, services and other forums
- Draft Legacy Society documents: brochure including enrollment form, acknowledgement/thank you letters (**ECF has samples**)
- Place announcement article (**ECF can assist with this**) in newsletter/bulletin, stressing idea of planned giving as a means of supporting valued ministries—list several examples of ministries that would receive support.

Month 3:

- Using material from ECF, 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 **(available from ECF)**
- Respond promptly to any inquiries
- Set and announce a date for an estate planning seminar **(ECF can provide suggestions for agenda and types of speakers)**

Month 4 & 5:

- Place another planned giving article in the newsletter
- Using the list generated in Month 1, begin a direct mail effort; sending a cover letter and the Ministry of Planned Giving brochure to prospective donors **(ECF can assist with this)**
- Respond promptly to any inquiries & continue planning and promoting 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 **(available from ECF)**
- Begin visiting donors who responded to 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 would receive; have response cards available, as well as brochures (if possible)
- Order new brochures, if necessary
- Continue to place articles in newsletter/bulletin
- Continue responding to inquiries
- 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 (**ECF can provide suggestions for agenda and assist speakers who do not have to have an in-depth knowledge of planned giving**)
- 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 efforts. How many gifts have come in? Which avenues were most effective? Events? Mailings?
- How do volunteers feel? Over or under worked? Are people enthusiastic about the program or does more promotional work need to be done? (**ECF can assist with this assessment**)

Month 12:

- Repeat techniques that worked best
- Train new or additional volunteers as necessary
- Begin planning a second estate planning seminar
- Begin planning second Legacy Society Event

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

***Note that these are sample programs and timelines. Steps do not necessarily need to be carried out in this order or in consecutive months. If, at any time, you would like additional information or suggestions, contact the Episcopal Church Foundation.*