



CATHOLIC
COMMUNITY
FOUNDATION®

WHERE GIVING LASTS FOREVER

Building a Planned Giving Endowment Ministry



WHERE GIVING LASTS FOREVER

“However, be on your guard and be very careful not to forget the things your own eyes have seen, nor let them slip from your heart as long as you live, but make them known to your children and to your children’s children...” Deuteronomy 4:9

Dear Friends:

On behalf of the Catholic Community Foundation, I am pleased to present this resource for building an effective Planned Giving program in your parish.

This booklet was created in recognition of the U.S. Conference of Catholic Bishops’ pastoral letter, *Stewardship - A Disciples Response*, which speaks directly to the importance of providing parishioners with information about planned giving as an integral part of their stewardship. A program designed to promote planned giving can be a wonderful tool to help parishioners deepen their stewardship commitment to the Church.

We know that planned and estate gifts hold great potential for helping parishes sustain and even grow their ministries for current and future generations. For example, churches in America today receive about 33% of all charitable gifts annually, but receive only 8% of bequest income (source: *Creative Giving-Understanding Planned Giving and Endowments in Church*, Discipleship Resources, 2005). Why aren’t churches receiving planned gifts? Largely because they have not been asking!

We’re confident you will find this step-by-step guide helpful as you seek to grow the long-term investment fund(s) you have with the Catholic Community Foundation. Thank you for your continued commitment to the Catholic Community Foundation, and we wish you success in your planned giving efforts.

With our Best,

A handwritten signature in black ink, appearing to read "AC Miller". The signature is written in a cursive, flowing style.

Anne Cullen Miller, M.B.A.
President

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The Case for Planned Giving

“For we brought nothing into the world, just as we shall not be able to take anything out of it.... For the love of money is the root of all evils... be rich in good works, to be generous, ready to share, thus accumulating as treasure a good foundation for the future, so as to win the life that is true life.”

~1 Timothy 6: 7-19

The U.S. Catholic Conference of Bishops’ Pastoral letter, *Stewardship-A Disciple’s Response*, speaks directly to the importance of providing individuals and families in your parish with information about planned giving as an integral part of your stewardship program. An educational program designed to promote planned giving can be another tool to help parishioners seeking to deepen their stewardship commitment to the Church. It can remind them of their overall stewardship responsibility and, at the same time, provide practical suggestions on how to use their accumulated assets to increase their income, save taxes, and contribute to sustaining the mission and ministries of your parish for future generations.

Here are a few more reasons why your parish NEEDS a Planned Giving program:

- If you’re not asking your parishioners for planned gifts, *someone else is*
- Cash-starved times *are the best times* for planned giving
- A typical planned gift is *200 to 300 times* the size of a parishioner’s annual gift to the Church
- Planned Gifts *do not affect* a parishioner’s cash flow
- Many parishioners *are eager to make a planned gift*, but simply don’t know how
- Parishioners making gifts through their wills will typically increase their annual fund support
- *Anyone* can make a planned gift
- Some parishioners have already named your parish in your will and *you don’t know it*
- There is *tremendous potential to increase financial support* for your parish today and forever

Here are some benefits you will find in the pages to come:

- A step-by-step process that is easy to follow
- Templates, samples and model documents provided for every step
- A toolkit that offers proven techniques to strengthen your planned giving program or start a new one
- Proven stewardship principles and practices

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The Steps to Building an Endowment Fund(s) and Cultivating a Culture of Planned Giving in your Parish

- Step 1: **Establish a Fund** at the Catholic Community Foundation (see Tab 3)
- Step 2: **Get started with a ‘Will Survey’** to identify those parishioners who already have a charitable intent to leave the parish a gift from their will or estate plan (see Tab 4)
- Step 3: **Recruit a person to ‘Champion’ your Planned Giving/Endowment Program** - Recruit a parishioner to lead your parish’s efforts to grow your endowment fund(s) and have this person serve on the parish’s Stewardship Committee (see Tab 5)
- Step 4: **Recruit a Planned Giving/Endowment Committee.** This committee could be a subcommittee of the Stewardship Committee (see Tab 5)
- Step 5: **Set goals for the Parish Endowment Campaign** - Identify financial goals for the endowment fund(s) based on how establishment and growth of the endowment supports the parish’s current or long-range strategic plan (see Tab 6)
- Step 6: **Develop a time and action plan to educate and engage parishioners** in supporting the parish endowment fund(s) and becoming members of a parish ‘Legacy’ or ‘Heritage’ Society (see Tab 7)

Marketing tactics to reach your target audience(s) might include:

- Personal visits by committee members to parishioners’ homes
- Planned Giving seminars
- Direct mailings
- Bulletin & pulpit announcements
- Web content
- Stewardship Days
- Matching gift promotions

Consider what parish initiatives are already happening (e.g. celebrating a milestone in the history of the parish) and build on them.

- Step 7: **Establish a “Legacy Society”** to honor parishioners who have named the parish in their estate plans or made a gift to the endowment(s). Consider naming the society after something unique in meaning to your parish.
- Step 8: **Add a link to the Catholic Community Foundation, www.ccf-mn.org, on your parish’s website.** This online resource enables your parishioners to learn about a variety of planned gifts and get immediate estimates of the income and charitable deductions for their gifts.
- Step 9: **Develop the necessary administrative policies and procedures** to document, track and record annual cash and/or planned (deferred) gifts to your endowment fund(s). This would include documents to record parishioners’ written intent to leave the Church a gift from their estate as well as policies for accepting gifts to your endowment.

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Institutional Funds with the Catholic Community Foundation

“Then the one who had received the five talents came forward, bringing five more talents and saying, ‘See I have made five more talents.’ His master said to him, ‘Well done, good and faithful servant; you have been trustworthy in a few things, I will put you in charge of many things. Enter into the joy of your master.’ – Matthew 25:20-22

The Catholic Community Foundation partners with Catholic parishes, schools and institutions to establish and manage endowments and long-term investment funds. These funds can be used to support outreach efforts, capital improvements, education ministries, or other designated priorities.

Through the Foundation, your fund gains access to investment portfolios and significant professional expertise not typically available to smaller funds. An experienced Investment Committee, advised by a leading investment management consultant, monitors the Foundation’s investment pools. We reflect our Catholic identity in our investment choices. In addition, the Foundation offers resources to help design a planned giving marketing program to secure gifts and you’re your fund.

We manage two types of funds:

Endowment Funds

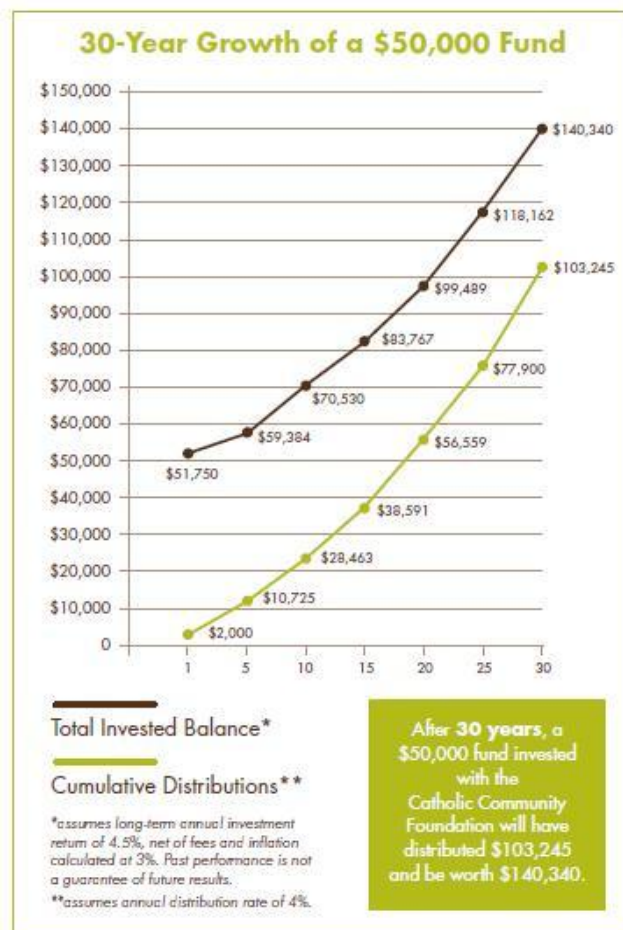
- Protects donor intent and fund corpus, in perpetuity.
- The Catholic Community Foundation manages annual endowment distributions, designed to protect the perpetual nature of the fund.

Agency Funds

- Various investment pools are available for long-term investment funds.
- The institution may deposit and withdraw assets at any time.
- The fund remains a legal and accounting asset of the establishing institution.

Benefits of Fund Management with the Catholic Community Foundation

- All Foundation investments are managed using an extensive due diligence process involving an independent investment consultant and financial experts serving on the Foundation’s Investment Committee.
- The Foundation can be a resource in securing complex gifts including the donation of real estate and property; private businesses; life insurance; and retirement accounts.
- The Foundation helps your staff and volunteers effectively promote planned gifts.



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PARISH LOGO

OR LETTERHEAD

**WILL SURVEY
SAMPLE LETTER**

“For we brought nothing into the world, just as we shall not be able to take anything out of it.... For the love of money is the root of all evils... be rich in good works, to be generous, ready to share, thus accumulating as treasure a good foundation for the future, so as to win the life that is true life.”

~1 Timothy 6: 7-19

Dear (First Names),

One of the priorities at [parish name] is to ensure the long-term viability of our parish community. By focusing on the future, we can ensure that dynamic liturgies, enriching faith formation programs and critical pastoral ministries will be available to the next generation of parishioners.

To this end we are pleased to announce the creation of a new “Legacy Society” at [parish name]. The purpose of our Legacy Society is to encourage planned and estate gifts to one of our parish endowment funds. As these funds grow, they will provide an increasing source of annual income to our parish, school and related ministries.

Creating our new Legacy Society allows us the opportunity to acknowledge and recognize parishioners like [individual or couple who agree to provide testimonial] who have remembered [parish name] in their will and/or estate plans. Their commitment to the future of [parish name] is founded in their strong faith:

“Our Catholic faith is the foundation of our lives and our gift will ensure that future generations will benefit from the quality faith formation ministries we and our children have experienced.”

- Jim and Mary Smith

As we establish our Legacy Society, we are asking parishioners to respond to the enclosed survey so that we are aware of parishioners who already have included [parish name] as a beneficiary in their estate plan, or who perhaps are intending to include the Church in their estate planning. **Please take a moment to complete and return the enclosed survey to the parish office by [date].**

You will be learning more about the Legacy Society next spring as we begin to formally introduce our planned giving and endowment ministry here at [parish name]. If you have any questions about the survey or Legacy Society, please contact [parish contact] at [email address] or [phone].

Blessings,

Fr. _____

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Will and Estate Plan Survey

There are many ways to express your stewardship of our parish, including a gift in your will or estate plan. Informing us of your intentions allows us to plan for the future and ensures that your gift will be used as you wish. Please complete this brief survey and return it in the Sunday collection basket. Thank you for taking the time to respond!

[1] I/We have a will or estate plan. YES NO

[2] I/We have included this parish in my/our will or estate plan. YES NO

[2A] (If applicable) I/We have included the parish school in my/our will or estate plan. YES NO

If you answered yes to 2 or 2A, would you like your name(s) to be included in recognition materials?

Yes, you may include my/our name(s). Please note exactly how you'd like your name(s) to appear below:

No, I/we prefer to remain anonymous.

[3] I would like to learn about gift planning opportunities to benefit our parish and/or school endowment fund. Please contact me regarding:

Naming the parish and/or school endowment as a beneficiary in my will or estate plan.

Establishing a charitable gift annuity or charitable remainder trust to benefit our endowment.

Designating the endowment as a beneficiary of a life insurance policy or retirement assets.

Donating stock or other appreciated property such as a home or share in a business to the endowment.

[4] I would like to learn about creating my/our own permanent endowment fund to benefit the parish and/or school forever. YES NO

[5] I have not included the parish in my will or other estate plans and do not care to receive information at this time.

[6] Please contact me regarding serving on a committee to engage other parishioners in charitable planned giving to benefit our parish. YES NO

Name (Please print.)

Address

City, State

ZIP

Email

Phone

We respect your privacy! Information collected here will be kept strictly confidential. It will not be sold, rented, loaned or otherwise disclosed, and it will not be used in ways to which you have not consented.

Recruit Volunteers

A. How to Identify and Recruit a Planned Giving and Endowment Ministry Champion

The first critical element of any successful Planned Giving/Endowment Ministry is effective leadership. This begins with the pastor of your church. The pastor is the gatekeeper. Very little in the life of any faith community is successful without the pastor's true support. If a project involves money, the pastor must be fully engaged and not simply pay lip service to the effort.

This does not mean that your pastor should chair the planned giving/endowment committee; he should not. However, pastors can play a key role in recruiting the lay leadership of the committee, attend planned giving/endowment events, and make their own planned or estate gift to lead by example.

With the pastor as the gatekeeper, the person selected to lead the Planned Giving/Endowment program is the force that pushes and energizes the program after the gate has been opened. As you consider who should chair your Planned Giving/Endowment Committee, think about people who:

- ✓ Are well known and respected in your parish and who grasp the necessity and urgency of a planned giving/endowment program.
- ✓ Have been in the parish for a significant length of time and know many individuals and families who have been in the parish for many years.
- ✓ Attend Mass regularly and have demonstrated their heart for your Church's ministries by actively participating in one or more of those ministries during their lifetimes.
- ✓ Have donated financial gifts on a regular basis in support of the parish. Ideally these people have given a gift in support of your endowment fund(s) and/or would be willing to make a cash and/or planned estate gift prior to taking on the role of Committee Chair.
- ✓ Have the time to devote to the effort. These could be parishioners who are semi-retired or retired or otherwise not involved in other Church ministries/projects at the time they are asked to chair the committee.
- ✓ Have a background or interest in one or more of the following areas: Christian stewardship, Secular Fundraising/Development, Sales/Marketing, Financial Planning, Estate Law, etc.

Once you've identified your prospective champions (note: candidates not recruited as Chair could be potential committee members), these people should be personally visited by the pastor together with the chair of the Church Council and/or Stewardship Committee and asked to serve in this leadership capacity. Those recruiting the champion should meet ahead of time to decide on the agenda for the visit and their respective roles, for example:

Planned Giving/Endowment Chairperson Recruitment Visit Agenda

Pastor's Opening Remarks:

- Opens meeting with prayer or scripture related to stewardship
- Acknowledges and thanks prospect for their support of the Church and their financial stewardship gifts in particular
- Acknowledges the potential value of the Church's endowment fund(s) and their importance to the mission of the Church today and for future generations (paints a vision of how these funds impact the Church)

Church Council Chair and/or Stewardship Committee Chair Remarks:

- Reiterates the importance of the Church's endowment fund(s) to the future of the parish and shares some of the basics of how a parish endowment fund works
- Acknowledges the need to raise additional funds for the endowment(s) and in particular focus on an area of untapped giving potential (i.e. planned and estate gifts)
- Describes the charter of the planned giving/endowment committee and where it fits in the overall Church lay leadership structure
- Shares some information about another successful parish endowment program in the Archdiocese
- Describes the current partnership of the parish with the Catholic Community Foundation and its services available to the chair and committee to build a planned giving/endowment program
- Describes the role of chair of the committee and asks the prospect if they would be willing to serve in this capacity for a period of ____ years (depending upon the policies of the Church related to lay leadership tenures on committees)

At this point allow the prospect to ask questions or clarify any issues they would like to address.

If prospect says YES! Assure them of the Church Council's and/or Stewardship Committee's support for his or her committee's work going forward.

If the prospect says NO. Ask if they if they would be willing to serve on the Planned Giving/Endowment Committee and if they have any suggestions of others in the parish that might be good prospects to chair and/or serve on the committee.

Pastor closes the meeting with a prayer of gratitude.

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B. How to Identify and Recruit a Planned Giving Endowment Committee

The second critical element of any successful Planned Giving/Endowment Ministry is making the program's success manageable. The Pastor cannot do it all, nor can the person he recruits to 'Champion' this ministry in your parish. The first action the Champion should take is to identify and recruit 5-9 other parish members (depending on the size of your parish) to serve with him/her on the Planned Giving/Endowment Committee. The committee should be diverse and include some of the most respected, spiritually motivated members in the parish. Like the Chair, these committee members must have track records of being generous contributors to the Church. Their generosity will demonstrate that stewardship is a personal and familial priority in their lives.

Further, the committee members need to be potential respondents who will be able to declare, "We have included the Church in our estate plan" or "We have established a charitable gift annuity that will benefit the Church" or "It was truly a blessing when John and I filled out the Declaration of Intent for a Future Estate gift to the Church the other evening." The Planned Giving/Endowment Committee can function under the auspices of the Parish Stewardship Committee but should remain a separate sub-committee. The Stewardship Committee focuses on raising funds for the **current annual operating needs of the parish**; the Planned Giving/Endowment Ministry stewards members' assets for the purposes growing endowments to ensure the **future financial stability and growth of the parish for future generations**.

In addition to the criteria mentioned above, consider engaging professional advisors within the parish who can plan and guide your planned giving/endowment ministry by virtue of their professional expertise. Check your parish membership list for members who are:

- ✓ Attorneys familiar with tax matters and estate planning
- ✓ Certified Public Accountants
- ✓ Members who sell life insurance
- ✓ Certified Financial Planners
- ✓ Bank and Trust Officers
- ✓ Planned Giving Professionals in other organizations
- ✓ Members familiar with approaches to effective marketing

Some of these individuals might be internal to your Church; others might be non-members or external advisors to the committee. In any event, the committee must adopt a policy for itself and for any advisors in order to avoid any conflicts of interest. Neither the committee nor its advisors can ever be in a position to expect to receive any gain, financial or otherwise, from participating in the work of the committee - with the exception perhaps of a feeling of great satisfaction.

Two additional qualities to consider in recruiting committee members are confidentiality and patience. It is imperative that every member of the committee and every advisor be able to maintain the confidentiality of the information they receive as members of the committee. Some of the information to

which the members might become privy can be deeply personal and private and the confidentiality of this information must be protected without exception. In addition, the members of your committee should have the spiritual gift of patience; planned giving programs by definition are programs that do not reap immediate financial rewards. **The Committee's work is to teach, to plant seeds and to convey the impact of planned giving on ministry.**

Once your committee is recruited, it should have a formal Charter Statement. Here is a SAMPLE Charter Statement for a Planned Giving/Endowment Committee:

Reporting to the Parish Stewardship Committee, this committee is responsible for encouraging current, planned and estate giving to financially ensure the future stability and growth of parish ministries for future generations.

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C. Sample Job Description for Parish Planned Giving Endowment Committee Members

A successful Planned Giving/Endowment Ministry is not pastorally driven; it is lay-driven with high pastoral support. The most critical lay participation comes from the members of your parish you recruit to serve on your Planned Giving/Endowment Committee. Here is a SAMPLE job description, which you can customize to fit the needs of your parish program. Be sure to bring this job description with you when you recruit committee members:

Qualifications:

1. Spiritual commitment to the stewardship mission of _____ Catholic Church, as evidenced by consistent and faithful donations of your time, talent and treasure to our various parish and community activities (e.g. regular participants in the offertory collection, Capital Campaigns and Endowment program(s) to include a planned/estate gift commitment in support of the Church.)
2. Strong interpersonal and organizational skills; ability to work productively with Church staff and volunteers.
3. Demonstrated leadership skills.
4. Additional qualifications preferred (but not required): Demonstrated skills or interests in financial planning, legal estate planning, sales and marketing, life insurance, etc.

Responsibilities:

1. Commit to making a planned estate gift (e.g. simple bequest, charitable gift annuity, Charitable Remainder Trust, IRA, Life Insurance Policy) in support of the Church.
2. Attend and actively participate in all meetings of the Committee throughout the year.
3. Participate in the development and execution of a three to five-year marketing plan in support of Parish endowment fund(s).
4. Attend and participate in events educating and/or honoring parishioners in regard to planned giving.
5. Assist in the identification, cultivation and solicitation of parish members who are prospective planned giving donors.
6. Assist in the identification and recruitment of individuals and/or couples who are willing to share personal testimonials with parishioners about their participation in the (Legacy/Heritage) Society.
7. Assist in determining endowment fund distribution policies and procedures for the parish (e.g. make recommendations to the Church Council and/or Finance Committee) on how funds are to be distributed to parish ministries each year.
8. Assist in identifying, recruiting, and orienting new members of the Committee.

Time Commitment: 24 Hours (one day a year to ensure the future of our Church forever)

1. Attend and Participate in Quarterly Meetings of the Committee (8 hours)
2. Attend and Participate Legacy/Heritage Society events (8 hours)
3. Other work duties in support of the Planned Giving/Endowment Marketing Plan (8 hours)

Suggested Term of Membership

Three Years

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Setting Goals for the Endowment Campaign

Goals are important in any fundraising activity, but are particularly important for building an endowment. Whereas your Church's annual stewardship drive is measured by the number of dollars raised, an endowment campaign (because they are funded largely through planned gifts) is measured in large part by non-financial goals. Clear goals allow your parish to make an effective annual evaluation, to measure your progress, to know when you're experiencing success and when you need to regroup and make a new plan.

Step 1: Begin with a VISION – What does the parish need from an endowment? The best way to focus the Church's leadership is to involve them in setting objectives. Use the parish's long-term strategic plan to identify specific funding objectives, whether those are unrestricted funds to support shortfalls in operation revenue (i.e. an operational reserve fund), funds to expand existing ministry programs or funds to award scholarships for students to attend your Catholic school.

Step 2: Move to the Practical –why does the parish need an endowment? Why are these goals critical to the parish's future? If the parish is building from a long-term strategic plan, the answers will be in the plan. If it does not have one, it is imperative a parish strategic plan is established to provide a foundation for the need, prioritize the needs of the parish and provide the context for the endowment campaign.

Step 3: Bridging the vision and the reality: when can you achieve the endowment objectives? Goals must be grounded in reality. Most endowment campaigns have short-term and long-term goals. Goals will vary depending upon the length of the endowment campaign and the non-financial goals that are integral to success (especially with the long-term endowment building approach using a planned giving program.)

Short-term goals may include:

- Identifying your target audience(s) by segmenting your donor base into categories, for example:
 - Those who give small to moderate amounts (\$200-\$1,000 annually) to plate and envelope consistently over many years
 - Those who give a significant amount to plate and envelope (\$1,000+ annually)
 - Those who give significant gifts to special projects
 - Active parish volunteers, who have committed 25+ hours/year
- Hiring a professional counsel to assist you in planning and executing the endowment campaign
- Writing a 'case statement' for the endowment campaign
- Developing campaign literature (e.g. an endowment brochure and pledge form)
- Conducting an initial campaign among Parish leadership (e.g. Parish Council members)
- Training board and parish lay staff on planned giving
- Adding temporary staff to support the campaign

Long term goals may include:

- Raising a specific dollar value in current gifts

Example: Goal: Increase the principal balance of the endowment by \$100,000 by FY 2020

- Objective 1: Secure X number (or \$value) of Charitable Gift Annuities that fully or partially benefit our parish endowment
 - Objective 2: Secure X number (or \$value) of testamentary gifts (bequests, life insurance, retirement assets) that fully or partially benefit our parish endowment
 - Objective 3: Secure \$X in outright gifts (cash or stock) that benefit the parish endowment
- Making X number of personal visits with parishioners to solicit support for the Endowment Fund

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How to Create a Multi-year Marketing Plan to Promote Planned Giving in your Parish

The third critical element of any successful Planned Giving/Endowment Ministry is *creating a positive climate for giving* within your parish. Like any ministry in your Church, parishioners are not going to engage themselves in this ministry without being educated about why the ministry exists, how it functions, how it relates to the overall mission of the parish, and how it relates to their own faith and spiritual development as Christian stewards in the Church.

While parishioners are being bombarded with thousands of commercials (messages) a day from a variety of media, you have a natural advantage in that you already have an established community where people gather each week. Parishioners, for the most part, know who you are and appreciate your work as evidenced by the Stewardship that is already taking place (i.e. volunteering of time and/or financial support.) On the other hand, we also know that while Churches receive on average 33% of the charitable dollars in the U.S.A., they are receiving only 8% of bequests. The primary reason for this statistic is simply that the donation of one's assets at the end of one's life to the Church is not on a lot of people's radar screens. *The reason many of your parishioners are not making planned gifts to your parish is because it has not occurred to them.*

Don Joiner, in his book, Creating a Climate for Giving, suggests that many churches have organized committees, developed policy statements, selected wise counselors and still failed to secure planned gifts for their ministries for the following reasons:

1. Unclear vision (paint a vision of how planned gifts further the mission of the Church)
2. Not knowing who will give (determining who your audience is for planned giving)
3. Not planning enough into the future (importance of strategic planning)
4. No budget (failure to devote enough resources to this area of stewardship)
5. Lack of patience (this is a marathon not a sprint)
6. Focus on annual rather than long-term financial sustainment goals
7. Lack of passion
8. Lack of promotion

The creation of a multi-year Planned Giving Marketing Plan should address all eight areas listed above.

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Planned Giving Marketing Steps

Step 1: **KICK OFF:** Mail or publish a letter from your pastor and Champion(s) announcing the endowment and the planned giving resources available to parishioners via the Catholic Community Foundation. Include information about upcoming planned giving education efforts, such as seminars, Legacy Society events, web resources, etc.

On-going “touch” strategy begins and should include:

- a) Regular mentions in the parish bulletin (i.e. language for wills, bequests, rotating “tips”, etc.)
- b) Ongoing content on webpage (i.e. “Planned Giving Corner”, language for wills, bequests, rotating “tips”, etc.)
- c) Mailings to your target audience(s), with phone or personal follow up.
- d) Announcements at Mass regarding making bequests to the parish, endowment fund updates, planned giving resources via CCF, etc.
- e) Planned Giving materials displayed in school/parish racks. See CCF for off-the-shelf resources or create your own brochure/flyer.
- f) Other periodic displays/posters/signage in school/parish supporting periodic events.

Step 2: **First Semi-Annual Event: Educate**

The goals are to announce the parish’s vision of the endowment fund and educate potential donors about planned giving options. Consider hosting it at a natural gathering time or venue for one or more of your target audiences (after daily Mass, during a senior’s group, during your parish festival, etc.) Send personal invitations to your target audience(s) and be sure to have a follow-up plan to reconnect with those who attend.

- a) Speakers may include your pastor, endowment champion(s) or Catholic Community Foundation Gift Planning staff.
- b) Possible topic: Leaving a Legacy at the parish

Step 3: Continue on-going “touch” strategy as described in Step 1.

Step 4: **Second Semi-Annual Event: Honor and Inspire**

The goal is to honor those who may already have contributed to the endowment fund and inspire others to consider a legacy. Consider providing a meal (luncheon or dinner) and making this a social event for your benefactors. The program may include a testimonial from one of your benefactors.

Plan to provide a recognition gift to your benefactors. Examples might include a plaque or item with unique significance to your parish community.

Step 5: Continue on-going “touch” strategy as described in Step 1.

Step 6: Year Two Schedule

- a) Repeat Step 2
- b) Repeat Step 3
- c) Repeat Step 4, as it becomes an annual benefactor recognition event
- d) At year-end, assess progress (i.e. – number of new will/bequest/beneficiary designations, number of new funds/CGAs established at CCF for the benefit of the parish, etc.) and report back to the parish in the bulletin or personal letter.

Repeat these steps annually and you will succeed in creating a culture of planned giving in your parish.

Remember:

Planned giving education is a marathon, not a sprint. Consistent, steady communications are the key!

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Timeline for Planning your Parish Planned Giving Seminar

Date	Action	Description	Responsible Parties
4 months prior to the scheduled Seminar	Finalize Plans with Seminar Leaders	Finalize plans with the seminar leaders. These professionals might include a local tax attorney who can address issues about estate planning matters as well as representatives from the Catholic Community Foundation who can present information on how CCF can help facilitate charitable gift planning as part of estate plans.	
	Develop List of Invitees	Develop a list of the names/addresses and telephone numbers of all parish members age 40 and older who have a history of giving to the parish and/or are active volunteers.	
	Prepare Letter of Invitation	Determine who will prepare the letter of invitation. Each letter should have an inside address and a personalized salutation. Each letter should be signed by two people: the Pastor and the Chair of the Planned Giving Endowment Committee for the parish. Draft the letter for review.	
	Establish Date/Time and Place	Confirm the date, place, meal (or refreshments to be served) and other arrangements for the seminar. Enlist one person as a site coordinator who can engage additional persons to assist.	
	Ask for Prayer	Inform any existing parish prayer groups of the plans for the seminar and request that they regularly include the planning committee, parish and prospective participants in their prayers.	
3 Months Prior to the scheduled Seminar	Perfect the List of Invitees	Eliminate those who no longer live in area and others for whom an invitation would be inappropriate (e.g. no longer mentally able to make decisions.)	
	Review First Draft of Letter	First draft of letter is prepared and distributed to planning committee for review.	
	Draft Articles for Parish Newsletter	Choose a person(s) to write four promotional newsletter articles to precede and promote the seminar and begin drafting articles.	
	Develop Professional Logo	Determine whether the parish has a graphic artist who can assist committee in developing a professional quality logo to be used in all publications or announcements of the seminar.	
	Balance the Planning Committee	Balance the seminar planning committee to include a liaison representative from other parish lay-leadership committees (e.g. Finance Committee or Church Council) if not already represented. This is an effective way of enhancing ownership in the seminar by all Church leaders.	
Week 8 before the	Prepare Invitees Index Cards	Prepare 5" x 8" index cards with name, address and telephone	

Date	Action	Description	Responsible Parties
scheduled Seminar		number of each invitee/couple. Include spouses by name, even if not members of the congregation. Mailing labels can be used.	
	Authors Confer on Articles	Author(s) of newsletter articles confer to determine approach, emphasis and style of articles.	
Week 6 before the scheduled Seminar	Assign Invitees to Committee Members	Assign every invitee to a member of the planning committee for personal invitation and follow-up. Recognize and honor existing relationships; consider best contact for each invitee. Distribute 5x8 index cards. Maintain a master list of all planning committee members and invitees they are to contact.	
	Prepare Letters for Mailing	Prepare all letters for mailing with individual signatures, hand addressed envelopes and first-class stamps.	
	Determine Delivery Method	Determine whether any invitations should be hand-delivered, and if so, who should deliver them. (Hand-delivered means making an appointment or taking the letter to the home or office).	
	Finalize Newsletter Articles	All four newsletter articles are drafted, reviewed and finalized.	
Week 5 before the scheduled Seminar	Publish Newsletter Articles	Newsletter articles submitted for publication with clear indication of order, dates of publication, who to contact if there are questions, etc.	
Week 4 before the scheduled Seminar	Mail or Hand-deliver Invitation Letters	Mail or hand-deliver invitation letters from the planning committee. Publish newsletter article #1.	
Week 3	Confer with Presenters	Confer with seminar presenter(s) to determine space, audio/visual, and display requirements (e.g. technology needs.)	
	Reconfirm all Logistics	Reconfirm all plans for place, special arrangements, audio visual equipment, food, etc.	
	Publish Newsletter Article	Publish newsletter article #2	
	Announce Seminar during Mass	Layperson announces seminar during the Sunday masses	
Week 2	Make Calls to Invitees	Planning committee members call every invitee to encourage attendance, answer questions and determine approximate participation. Make notes on cards for later reference. Report any pastoral concerns to pastor immediately.	
	Publish Newsletter	Publish newsletter article #3	

Date	Action	Description	Responsible Parties
	Article		
	Announce Seminar from Pulpit	Pastor announces seminar from pulpit at Sunday masses	
Week 1	Report on Attendance	Callers report attendance projections to site coordinator for arrangements, seating, food, etc.	
	Make Reminder Calls	Late in the week, callers telephone to remind each invitee who has indicated definite or possible plans to attend the seminar.	
	Prepare Name tags	Prepare name tags for all possible attendees and have extras for unexpected attendees.	
	Publish Newsletter Article	Publish newsletter article #4	
Day of Seminar or just before	Finalize Logistics	Finalize space settings and arrangements. Include reception table with prepared nametags.	
	Announce at Mass	<p>Chair of Planned Giving Endowment Committee announces seminar during mass.</p> <p>All committee members report to room 20 minutes early to serve as hosts and hostesses.</p>	

(Source: Creative Giving-Understanding Planned Giving and Endowments in Church Michael Reeves, Rob Fairly, Sanford Coon, Discipleship Resources 2005)

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SAMPLE CCF Marketing Materials



“So the next generation would know them, even the children yet to be born, and they in turn would tell their children...”

PSALM 78:6

Free Seminar: Your Life, Your Legacy

How can you ensure that your values will live on after you pass away? You can take steps today to document how you wish to be remembered by creating an *ethical will*. Join us to learn more about how ethical wills can inform your estate plans, and how the Catholic Community Foundation can help you exercise your charitable giving to support your parish and other causes close to your heart. You'll have a chance to consider significant questions such as:

How is the world better because I've lived?

How can I pass my values on to future generations?

How do my values influence my charitable giving decisions?

Speaker:

Bill Marsella, M.S.W.
Director of Institutional Relations
Catholic Community Foundation



Guardian Angels Church
Dining Room
Friday, January 6, 2012
11:15 a.m.

Please RSVP by calling the Church Office at 651-738-2223 if you are interested in lunch following the presentation.

SAMPLE CCF Marketing Materials

5 WAYS TO SUPPORT OUR PARISH FUND

1

Cash or Stock

Contribute any amount, any time! Checks should be made payable to the parish, with a note that your gift is for our long-term fund at the Catholic Community Foundation. Gifts of stock are converted to cash and the value is added to our fund. By donating appreciated stock, there is a possibility of eliminating federal capital gains tax while supporting our parish community.

2

Bequest in Your Will or Estate Plan

A simple, easy way to remember our parish is in your will or estate plan. You may designate a specific dollar amount or percentage of the residue of your estate as a gift to our long-term fund. Please contact your attorney or the Catholic Community Foundation for applicable language to include in your will.

3

Charitable Gift Annuities (CGA)

A CGA provides you with regular payments for the rest of your life. The balance of your annuity then becomes a charitable gift to our parish fund at the Catholic Community Foundation. A minimum gift of \$10,000 is required to establish a CGA.

4

Life Insurance or IRA Beneficiary Designations

You may name our parish as a full or partial primary or contingent beneficiary on your life insurance policy. If you donate a policy, you may deduct its fair market value (as determined for tax purposes) or the cost basis, if lower. In the case of retirement plan assets such as an employee plan, IRA or tax-sheltered annuity, your beneficiaries will owe income tax on these assets, which may be up to 35 percent. Donating even a portion of your plan can provide a significant tax benefit.

5

Donations of a Business, Personal Property or Real Estate


Avoid the hassle of selling a business; piece of property such as a home, cabin or farmland; or other personal property of value—all while receiving valuable income tax, capital gains tax, or future estate tax deductions. In the case of a primary or vacation home, you can even choose to continue to use it for the rest of your life, and dedicate it to our parish in your estate plan.



The Catholic Community Foundation (CCF) in St. Paul helps parishes, schools and Catholic institutions achieve financial sustainability through the efficient and sophisticated management of long-term investment funds. With CCF's expertise—and your support—our fund will provide financial resources for the future needs of our community. www.ccf-mn.org • (651) 389-0300



SAMPLE Materials used by St. Odilia in Shoreview, MN




Your Endowment Fund at Work

More than 60 projects identified by parish leadership have been made possible by the St. Odilia Endowment Fund. Distributions of earnings from the fund are used for one-time, unbudgeted priority needs of the parish community. Examples include:

- Church Carpet
- Church Projection System
- Classroom Projectors, Smart Boards and Storage Lockers
- Computers
- Courtyard Air Conditioning
- CPR Equipment
- Faith Formation Camcorder and Digital Camera
- Faith Formation Tuition Assistance
- Grand Piano for Worship Space
- Handicap Door Access
- Immigration Conference
- Lawn Irrigation System
- School Tuition Scholarships
- Server Vestments
- Spanish Gospel Book
- Youth Mission Trip

Next Steps

For more information on contributing to the St. Odilia Endowment Fund, please complete the attached form or contact:




Roger Toogood
Volunteer Chair,
St. Odilia Endowment
Fund Committee
Rtoogood@msn.com
651-484-2340


{

"We have chosen to be long-term supporters of the Catholic Community of St. Odilia by contributing to the Endowment Fund. We know that our gift will be multiplied and used effectively for future needs."

}




Jim and Elizabeth Foley



Catholic Community
of St. Odilia


3495 North Victoria Street
Shoreview, MN 55126

651-484-6681
www.stodilia.org



Catholic Community
of St. Odilia

Endowment Fund



**Grateful Today –
Planning for Tomorrow**

**Grateful Today –
Planning for Tomorrow**

Since its inception in 1987, the St. Odilia Endowment Fund has become a sustainable source of income for our parish community. Gifts to the Endowment Fund can be designated to support one or more of the following priorities:

Worship
Provides materials and equipment like sound and video as well as other resources to maintain inspirational, dynamic liturgy and music for our parish community.

Faith Formation
Enriches life-long faith formation and supports creative programs for parishioners ranging from early childhood to adulthood.

Faith Formation Scholarships
Provides financial assistance for children and teens from families of modest means for ongoing faith formation and sacrament preparation.

Pastoral Care
Supports outreach ministries to the elderly, homebound, sick, and grieving members of our parish community. Also provides emotional and spiritual care to those in crisis or life transitions such as marriage, divorce, and parenting.

Justice
Promotes social justice issues within our community and helps to meet the needs of the poor within and outside our parish.

School
Strengthens the quality of programs, staffing, and instructional materials at St. Odilia School.

Connor Anderson Scholarship Fund
Provides tuition aid for families of modest means seeking a Catholic education.

Capital
Finances improvements, maintenance and repair of our campus buildings and equipment.

Undesignated
Allows the allocation of resources as needed to cover unbudgeted priorities of the parish community.



A Gift That Lasts Forever

Gifts to the Endowment Fund are invested for perpetuity and only the earnings are used to support special projects not included in the parish's annual operating budget. Contributions of any size are greatly appreciated. There are many ways to support the Endowment Fund:

Gifts of Cash or Stock
Contribute any amount, any time! Checks should be made payable to "St. Odilia Endowment Fund." Gifts of stock are converted to cash and the value is added to our Fund. You can even donate online by using a credit card! Simply visit www.stodilia.org and click on the Stewardship dropdown menu.

Charitable Gift Annuities (CGA)
A Charitable Gift Annuity provides you with a guaranteed, fixed rate income for the rest of your life. The balance of your annuity then becomes a charitable gift to the Endowment Fund. A minimum gift of \$10,000 is required to establish a CGA.

Bequest in Your Will or Estate Plan
A simple, easy way to remember St. Odilia is in your will or estate plan. You may designate a specific dollar amount or percentage of the residue of your estate as a gift to the Endowment Fund. Please contact your attorney or us for applicable language.

Life Insurance or IRA Beneficiary Designations
You may name the St. Odilia Endowment Fund as a full or partial beneficiary. You can remember your parish community with a gift that does not tap into your current cash assets.

Donations of a Business, Personal Property, or Real Estate
You can donate your home or cabin and continue to use it for the rest of your life. You might consider gifts of a closely-held business or other assets of value.

If your gifts total \$1,000 or more, you will be recognized as a Benefactor of the St. Odilia Endowment Fund.

{

Currently valued at more than \$1.2 million, earnings from the fund have generated more than \$300,000 for special projects not included in the parish's annual operating budget. The Endowment Fund has over 300 benefactors.

}





SAMPLE Materials used by St. Odilia in Shoreview, MN

Yes! I want to help plan for the future of our parish with an outright or planned gift to the St. Odilia Endowment Fund. I am especially interested in the:

- Undesignated Fund
- Justice Fund
- Worship Fund
- School Fund
- Faith Formation Fund
- Connor Anderson Scholarship Fund
- Faith Formation Scholarship Fund
- Capital Fund

Please have an Endowment Fund Committee member contact me regarding making a gift through my estate or other planned giving vehicle.

Name _____

Address _____

City _____

State _____ Zip _____

Phone _____ Email Address _____

I am enclosing a gift to the St. Odilia Endowment Fund
(please make checks payable to "St. Odilia Endowment Fund.")

Amount: \$1,000 \$2,000 \$3,000 \$5,000 Other _____

St. Odilia Endowment Fund
3495 North Victoria Street
Shoreview, MN 55125

Place
Stamp
Here



Catholic Community
of St. Odilia

Endowment Fund

**Grateful Today –
Planning for Tomorrow**

Notice of Intent for a Future Estate Gift

One of the common tools used in any planned giving program is a “Donor Letter of Intent for a Future Estate Gift.” Some may call it a pledge form, and it is a simple document that is not legally binding but records the expressed written intent of the donor(s) at the time they are making the commitment to join your Planned Giving/Endowment Society. The letter is designed to capture five essential pieces of information:

1. The formal indication of the donor(s) to include your Church in their Estate Plan
2. The type of planned gift being donated (e.g. a simple bequest, a gift from a Retirement Account or Trust, Charitable Gift Annuity etc.)
3. Where the donor(s) would like to have the money spent in support of the Church (i.e. the specific endowment fund(s) they want to support)
4. The approximate amount or value of the gift if known
5. The donor(s) permission to publicly list their names (i.e. recognize them for their commitment to join your Legacy Society) or designation that they wish to remain anonymous

Having this information on file is essential for managing and tracking your Planned Giving/Endowment program. Among other things, this information will allow you to follow-up with family members of the donor(s) upon their death (i.e. to secure the gift from their estate) as well as give you a rough idea of how much money you can expect to receive from planned/estate gift donors who have joined your Society (commonly referred to as ‘planned gift expectancies’).

Following is a sample format for you to use and customize for your parish.

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SAMPLE INTENTION NOTICE FOR A FUTURE/ESTATE GIFT

As evidence of my/our desire to provide a legacy of support to (NAME OF YOUR CHURCH), I/we hereby inform you that I/we have made a provision for a gift in my/our estate plans. I/we understand that this commitment is revocable and can be modified by me/us at any time.

It is my/our intent to leave a legacy gift to (NAME OF YOUR CHURCH) through my/our:

Will Living Trust Retirement Plan Assets
 Charitable Remainder Trust Life Insurance Policy Other

My/our gift is restricted in support of (INSERT the funds your parish holds with CCF):

e.g. _____ Parish School Endowment Fund: to ensure quality education for future generations

e.g. _____ Perpetual Care Cemetery Fund: to ensure a final resting place for future generations

I/we wish to inform you for long-term purposes only that, as of this date, the value of my/our gift is \$_____. * (If your gift is a percentage of your estate, please indicate the approximate value of that percentage.) I/we understand that, by stating an amount, my/our estate is not legally bound by this statement and I/we may choose to add, subtract, or revoke this bequest at any time, at my/our sole discretion. (NAME OF CHURCH HERE) kindly requests notification any time you make changes or adjustments to your gift.

Unless checked below, I agree to have my/our name(s) published on lists of legacy donors as a motivation for others to leave a future gift to benefit (NAME OF CHURCH HERE). (*Note: The amount of your gift is not published and remains confidential.*)

Do not list my/our names either internally/ externally (Anonymous gift)

Please list my/our names internally only (No outside publication)

List your name(s) as you would like it (them) in print.

Donor Signature

Date

Donor Signature

Date

Name(s): _____

Address: _____

City, State Zip: _____

Date of Birth: _____ Date of Birth: _____

Phone: _____ E-mail(s): _____

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How to Ask for Planned/Estate Gifts to Support the Parish Endowment Fund

Even the most ideal marketing plans for educating your parishioners about planned giving will fail unless there are people who are willing to make a planned gift commitment themselves and then go out and ask others to follow them.

The intent of this section is to give you some helpful tips on how to organize and train your volunteer ambassadors to accomplish this part of your annual stewardship ministry.

Where do you find ‘ambassadors’ to help cultivate and ask other parishioners to join the Legacy Society?

It’s always easier to ask someone else to do something if you have already done it yourself. The best first-line ambassadors for your Planned Giving/Endowment program are parishioners who have already left a gift from their estate to the Church or parishioners who have a strong connection to the parish and support the idea of leaving gifts to an endowment fund. Your Pastor can be a source of information on parishioners who might fit these categories, however one of the objectives of the Will Survey (**see Tab 4**) is to identify parishioners who can possibly be recruited as ‘ambassadors’ to contact others about planned gifts. As suggested earlier, these are also the people you want serving on your Planned Giving Committee and their job description should include helping identify and recruit parishioners to join the Legacy Society of your Church (**see Tab 5**.)

What role should the Pastor have in helping identify and recruit new members of the Legacy Society?

Your pastor is the spiritual leader of your community and plays a key role in making your Planned Giving program successful. The Pastor can assist you with:

- Identifying parishioners that might have the interest, willingness and capacity to make a financial gift in support of the endowment fund(s) and join your Legacy Society.
- Accompany you on personal visit(s) with parishioners to educate them about the endowment fund(s) and ask them to join your Legacy Society.

Your pastor is in a unique position to introduce your Endowment Committee to the parish and announce that members of this committee will be going out to visit parishioners to educate them about your endowment fund(s) and the Legacy Society. He can do this by putting an article in the church bulletin or newsletter, announcing it from the pulpit on Sunday and/or sending a letter to parishioners prior to their receiving a phone call (i.e. to set up a personal visit). Here is a SAMPLE letter by your Pastor introducing the home visits by members of your Endowment Committee:

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Sample Letter from the Pastor Announcing a 'Visit' from an Endowment Committee Member

"For we brought nothing into the world, just as we shall not be able to take anything out of it.... For the love of money is the root of all evils... be rich in good works, to be generous, ready to share, thus accumulating as treasure a good foundation for the future, so as to win the life that is true life."

~1 Timothy 6: 7-19

Dear John and Mary:

In his book, Have a Little Faith, author Mitch Albom talks about a conversation he has with his childhood Rabbi before his Rabbi's death. He asks, "Rabbi do people fear dying?" His Rabbi replies, "No, my son, people do not fear dying. What they fear is being forgotten, they call it a 'second death'."

Here at (Name of Parish), our parishioners need not fear being forgotten after their deaths. We offer everyone a unique opportunity to live out their Catholic faith and values by supporting the (Name of Parish) Endowment Fund(s) we have established with the Catholic Community Foundation. The fund(s) is/are a proven financial vehicle for sustaining current parish ministries while offering creative, alternative ways for supporting parish needs for future generations.

In the past the earnings from our endowment(s) have helped our parish:

(here list examples of how money from the endowment(s) have been used to benefit the parish or a specific ministry program within the parish; try to be specific by telling a story about a parishioner whose life was impacted by the funds; for example if the funds are used for school scholarships give an example of a student who has received such a scholarship)

Our Endowment Committee is a group of parishioners responsible for growing this fund, and helping parishioners become engaged in the work of the Endowment Fund. It is in this spirit, that I would like to introduce (name of volunteer making the visit) to both of you. (Name) is a member of our Endowment Committee and he/she will be calling you to set up a time to visit. I trust you will take the time to visit with him/her because I know you take seriously your commitment to give your time, talent and treasure to God, who has blessed you and our faith community with such abundant gifts.

(Name)'s visit will not only give you an opportunity to learn more about the impact our Endowment Fund(s) is/are having on our parish community, but moreover it will give us a chance to LEARN FROM YOU what areas of ministry and parish life you feel are most important for receiving sustaining and growing financial support from the Fund in the future.

Yours in Christ,

Father _____

Pastor

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Identifying prospective parishioners to engage in conversation about joining the Legacy Society:

Step 1

If you haven't done so, start by sending out a Will Survey to the parish (see Tab 4.) Collect the surveys identifying parishioners who have indicated that they have already left the parish/school in their will and those parishioners who have expressed an interest in learning more about leaving a gift in their estate to benefit the parish/school. These are your top prospects for starting your Legacy Society.

Step 2

Ask your parish business administrator to sort the parish membership list by demographics, then review this list with your Pastor and the Committee. Generally parishioners who fall into one or more of the following categories should be at the top of your prospect list:

- **Senior Parishioners:** generally parishioners who are older (choose an age-break, e.g. 65+) and those who have been in the parish for some length of time.
- **Parishioners who are Engaged in the Church:** Those parishioners who have been active attendees at Sunday Mass and/or engaged in one or more ministries of the Church
- **Church Lay Leaders:** Those members of the Church who are recognized leaders on Church Council or other committees, the so-called 'go to' people in the parish whom others know and respect.
- **Steady Financial Stewards of the Church:** While it's tempting to isolate major donors to the Church (e.g. the 20% who supply 80% of the annual operating fund with their gifts), with planned gifts, your best prospects are often the 'widows mite': those parishioners who have consistently given the Church basket gifts of \$500 or more annually over several years.
- **Single Members of the Church:** Single men and women who have been active members of the Church may be in a better position to leave a portion of their estate to institutions that have meant something in their lives (i.e. their Church.)

You may want to set up a grid (matrix) of categories and identify members that fit in one or more of the categories. The more (x's) you see next to someone's name, the higher they should be on your Legacy Society prospect list.

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Step 3

What is the 'Agenda' for a Legacy Society Prospect Visit?

Before meeting with parishioners who could be prospects for joining your Legacy Society, you need to make the phone call to introduce yourself and set up a time to visit them. This is why it's vitally important for parishioners to receive the letter from the pastor before you pick up the phone to set up the appointment. The agenda for your phone call and personal visit with the Legacy Society prospect is 'set up' by the Pastor's letter.

Suggested Agenda for the Phone Call (i.e. suggested script) with Legacy Society prospects to arrange your initial meeting:

Introduction:

- Introduce yourself and thank them for taking the call
- Ask them if they received a letter from your Pastor introducing you and the purpose of your call.
- Reiterate the main points of the letter:
- On behalf of our parish Endowment Committee and Legacy Society I'd like to come out and visit with you.

The PURPOSE of my visit is to learn more about:

- How you are engaged in the ministries and programs of [the parish]
- How you think our Stewardship programs can be improved at [the parish] and in particular what ministries and/or areas of parish life you feel are most important to sustain for current and future generations
- How you think we can strengthen our efforts to help parishioners leave a 'legacy' when it comes to their Stewardship at [the parish]
- Educate you about the Endowment Fund(s) our parish has established for future generations and our Legacy Society program

The PROCESS for the visit will be to simply ask you a few questions and engage in discussion.

The PAYOFF:

- For us: our Endowment Committee will gain valuable information that will help inform how we invest and grant money to parish ministries in order to insure our Church remains vital and strong for future generations.
- For YOU: you will learn of perhaps another way you can deepen your Stewardship commitment to the Church.

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The CLOSE:

- When would be a good time for me to come out for visit?
- If the parishioner says NO (they are not interested in visiting), LISTEN CAREFULLY and probe as to the reason (Note: If they are busy right now and cannot take the appointment suggest another time in the future you could call back to schedule a visit)
 - I understand now is not a good time, how about if I call back in 6 months to see about scheduling a visit? (Note: you may also want to indicate that to make it easier on the parishioner(s) you are willing to visit with them the next time they are at the Church (e.g. before or after Mass))
- Once you've set up the appointment, be sure you enter this information into your personal calendar. If you and the parishioner have agreed you will call them back later to set up a visit, make a note of that. Also record the follow up on the master spreadsheet you are using to track calls and visits with parishioners (**see below: Tracking Visits, page 33.**)

Suggested Outline Agenda for your Personal Visit with Parishioners who are prospects to give a Planned/Estate gift in support of your parish Endowment Fund(s) and join your Legacy Society:

Introduction/Establish Rapport (5 to 10 mins)

- The goal of this introductory part of the visit is to establish rapport with the parishioners you're visiting, to put them and yourselves at ease and feeling comfortable about the visit.
- Greet the prospect and thank them again for allowing time for you to visit with them.
- Note: If your pastor is with you, have him start the meeting with a prayer (perhaps read from Scripture related to Stewardship and Legacy) and share a personal reflection, or you could do this to start the visit. Here are some suggested Scripture Passages you could use for this purpose:

"For we brought nothing into the world, just as we shall not be able to take anything out of it... For the love of money is the root of all evils... be rich in good works, to be generous, ready to share, thus accumulating as treasure a good foundation for the future, so as to win the life that is true life." ~1 Timothy 6: 7-19

"... Whoever sows sparingly will also reap sparingly, and whoever sows bountifully will also reap bountifully... for God loves a cheerful giver. Moreover, God is able to make every grace abundant for you, so that in all things, always having all you need, you may have an abundance for every good work." ~ 2 Corinthians 9:6-8

- If you know or already have a relationship with the person(s) you are visiting, begin by acknowledging your friendship or how you know each other. *(Note: this is the ideal scenario: building your confidence by first calling people on your list you know best.)*
- If you don't know the person(s) you are visiting, try to find something you have in common to begin the conversation. Often you can do this by simply observing your surroundings. For example, if you see a family photo on the wall and notice they have grandchildren, you might begin by comparing notes about what it's like being grandparents. If you served in the military and you notice something in their home that indicates someone has prior military service, you can inquire about this and talk about your mutual experiences in the military. At a minimum, you could begin by acknowledging you are both parishioners at (Name of Church).

Discovery (10-15 mins)

- The goal of this part of the visit is to learn more about the parishioner's needs and wants as it pertains to their Stewardship with the Church. Discuss how they would like to be remembered for this part of their life and the difference they would like to make in the lives of others for future generations as part of their Legacy.
- After you've established initial rapport with the parishioner(s), spend some time getting to know them. Specifically, your goal is to engage them in a conversation about their lives and the role their Catholic faith and Parish has played in their lives.
- Focus on asking open-ended questions that will help them share information about their values and what's important to them when it comes to their engagement with their faith, the parish, and specifically their financial stewardship as Christians. Here are some suggested open-ended questions for this part of your visit:

(Sample 'Discovery' Questions)

- We're always interested in learning more about how we can improve the Stewardship Program here at [the parish.] What does the term Stewardship mean to you? How have you experienced our Stewardship program? How can we improve this ministry of the Church?
- Is there someone in your life who has greatly influenced you when it comes to your Catholic faith? Tell me more about this person and how they influenced you.
- Is there someone in your life who has greatly influenced you when it comes to giving back to the community? Tell me more about this person(s) and what they taught you.
- You've been a long time member of our parish; tell me what attracted you to come to [the parish]. Why have you stayed?
- Is there a ministry or program here at [the Parish] that has meant something to you (your family) over the years? Tell me more about that.

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- If time and money were no object in your life (i.e. you had unlimited resources) where would you spend your time and money in a way that would be meaningful to you? Tell me more about that.
 - Our Endowment Committee makes financial grants every year to help sustain our parish's operations (ministries/programs.) We often have to prioritize the programs we can fund with the limited resources we have, which ministries/programs do you think are most important to support? Tell me more about that.
- Notice that these are open-ended questions for the most part, designed to give you information about these parishioners' values when it comes to their Catholic faith and participation in the Church (your parish), Stewardship, and their Philanthropy.
 - LISTEN CLOSELY for needs or values that align with the work represented by your Endowment fund(s) and Legacy Society. For example, if the parishioners mention how much they value the Parish School ("all our kids went there and got a great education") and your Parish has an endowment fund that supports school scholarships for needy students, you are positioned to make this 'connection' in the next phase of the visit (see below).
 - This last question in the discovery interview sets up the final portion of the visit:
 - Have you thought about how you would like to be remembered in this area of your life (i.e., Catholic Faith and Stewardship support of the Church)? What do you want your legacy to be?

Advocacy and the 'Ask' (5 mins)

- The goal of this final part of the agenda is to 'educate' the parishioner(s) about the Legacy Society and the Endowment Fund(s) in the Parish. This is when you would bring out any literature you have that promotes your Legacy Society or Endowment Program (see Tab 7) and point out how this program aligns with the parishioners' needs and wants as these relate to supporting the Catholic Church (and your parish's endowment fund(s) in particular). But again, this happens only after you have stayed in the Discovery phase of the visit long enough to make this connection.
- The best way to make the 'ask' is to share your own personal story about why you have made a planned gift to support the Church. For example you might say something like:
 - "Like you, my wife and I value Catholic education or (the wonderful Liturgies here at [the parish]) and we wanted to make sure these ministries were sustained and able to grow for future generations, so we made a commitment to leave a gift in our estate to the Endowment fund(s) and join the Legacy Society. We'd like to ask you (both of you) if you would join us?"

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- At this point you would hand them the Endowment brochure and a copy of the Letter of Intent for a Future Estate Gift to the Church (see Tab 8). **NOW STOP TALKING AND JUST LISTEN!!**

It's necessary to stop talking here.... allow the parishioners absorb the ask and then share what's on their mind. You can hear a lot of possible responses including:

- “Oh we've already included [the parish] in our Will or Estate Plan.”

In which case, you could say, “Thank you! Would you be willing to fill out the Letter of Intent so we can make sure we have an accurate record of your gift intentions? And can we include you as new members in our Legacy Society (or do you wish to remain anonymous).....

Note: make sure you clarify with the parishioner(s) whether they intended to have their gift simply go to the parish general operating fund or if they would like to support a specific endowment fund(s) and make sure this is appropriately marked on the Letter of Intent Form.

- “We're not ready to make a decision right now we're in the process (or are planning) to revise our Estate Plan.”

In which case, you could say, “Thank you so much for your time. When might be a good time to get back with you and your wife/husband to discuss this further?” (Make a note in your calendar to call them again.)

- “We appreciate the information you've shared with us but we're just not interested in adding the Church to our Will at this time”

In which case, you could say, “Thank you so much for your time. We appreciate the wonderful support you give our parish and the opportunity to share information with you about our Endowment funds. Please know that you can call on me anytime you may have questions or need further information about our Legacy Society.”

- “We'd like to leave some money to the Church but frankly we're worried about outliving our financial resources or being a financial burden to our children.”

In which case you could say, “It sounds like you are concerned about wanting to leave a gift to our parish but may need to do so in a way that provides an income to you for the rest of your life, is this correct? We work closely with the Catholic Community Foundation (who manages our Endowment funds) and they have staff available who can assist you with planning for these kinds of gifts. If you'd like, we can forward your name on to them and they can follow up to assist you with this type of charitable gift planning in support of the Church.

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Tracking visits is an important piece of the overall puzzle. Be sure to:

- Have an electronic and/or paper report (i.e. a spreadsheet used for tracking this Volunteer Ambassador Visiting Program) that contains:
 - The name of the prospect(s) called for a visit
 - Previous giving history (including year, amount and designation)
 - Calendar Dates for:
 - Introductory Letter sent by the Pastor
 - Phone call to set up appointment and brief notes of what was discussed and the outcome of the call
 - Scheduled personal visit by the Volunteer and brief notes of what was discussed and the outcome of the visit
 - Follow-up actions needed by the Volunteer Ambassador
 - Whether you have on file a signed Notice of Intent for a Future Estate Gift
 - The amount (if known) of any Planned Estate Gift they intent to leave the Church (note: even if it's only a percentage of their estate)
 - Where the parishioner(s) want their planned gift designated (e.g. 50% to the parish endowment fund 50% to the parish general operating budget)
- Send the parishioners a follow-up letter again thanking them for taking the time to visit with you and summarizing any agreements reached during the visit (e.g. “per our visit I will check back with you in 6 months after you’ve revised your estate plan to see whether we can include you in our Legacy Society.”)

Finally we’d like to remind you that “Rome was not built in a day.” Establishing a Planned Giving Stewardship Program in your parish is not a sprint, but a marathon. It will take time to help educate your parishioners about the value of establishing and growing endowment fund(s) for building God’s kingdom for future generations. Many parishioners are used to being solicited for planned gifts from other institutions (e.g. their College alma mater) but not by their parish. If you would like more information on how to build Church Endowment(s) and Planned Giving programs in Churches here are two excellent resources:

Sources:

[Creative Giving-Understanding Planned Giving and Endowments in Church](#) (by Reeves, Fairly, Coon. Copyright 2005, Discipleship Resources)

[Creating a Climate for Giving](#) (by Donald W. Joiner. Copyright 2001, Discipleship Resources)

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