



INTEGRATING YOUR ANNUAL, CAPITAL, AND PLANNED GIVING

Church Leadership Conference

Terri Mathes, Senior Program Director

February 28, 2015

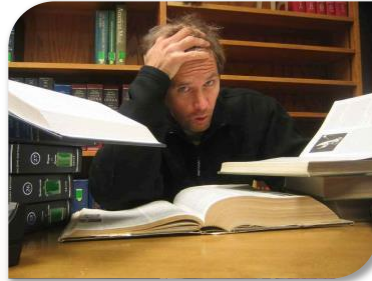


	<p><i>Strengthens the leadership and financial capabilities of Episcopal congregations, dioceses and communities of faith to pursue their mission and ministry</i></p>
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What We'll Cover

- Definition of terms
- Annual giving as mission investment
- Capital campaign as mission fruition
- Planned giving as pastoral care
- Building a plan



Different Types of Giving

Annual (Ordinary)

- Funds operations
- Donor gives from cash flow
- Tied to daily mission & ministry

Capital (Extraordinary)

- Funds specific projects, often related to building
- Donor gives from assets
- Tied to future/growth of your mission

Planned (Ultimate)

- Funds perpetual activities
- Donor gives from estate
- Tied to the continuation of your mission

Annual Giving



Your farm team for mission

- First step toward financial commitment
- Formational training ground



Annual Giving



Your farm team for mission

- What is God calling us to do or become?
- What do we need to answer that call?



Annual Giving

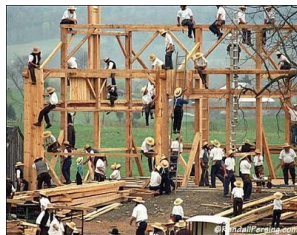


Your farm team for mission

- What is God calling us to do or become?
- An ongoing conversation
- The basis of formation



Annual Giving

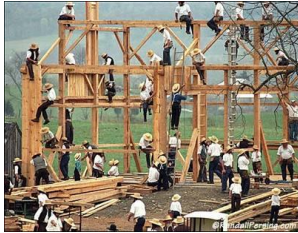


Your farm team for mission

- Involvement creates commitment
- Commitment fosters growth



Capital Giving



A fruition of mission

- Involvement creates commitment
- Commitment fosters growth



A Successful Capital Campaign

Discernment

- Visioning
- Prayer
- Involvement
- Planning
- Communication

Study

- A Formal Feasibility Study
- Communicate the Results

Ask

- The Solicitation Process
- Thanksgiving
- Implementation



Discernment: What is God Calling You to Do or Become?

Creating Ownership and Involvement

- Identify needs
- Connect to your mission
- Involve leaders, stakeholders, visionaries
- Communicate the vision

"Without a vision, the people perish."
-- Proverbs 29:1-18



Capital v. Annual Giving

A word about annual giving during campaigns

- Keep connected to your mission
- In some cases, it may increase



Planned Giving



As formation & pastoral care

- 50% of Americans have an out of date will or none at all.
- Stewardship is about all our resources & how we use them
- Church as a safe place to discuss ultimate choices



Planned Giving



As part of annual giving

- 80% of estate gifts are bequests
- Regular reminders in bulletin, newsletter
- Publicize responsible use of bequests as they're received



Planned Giving



As part of capital giving

- Potential donors identified by feasibility study
- Common responses:
 - I'm on a fixed income
 - I'm paying grandchildren's education
 - My money's tied up in my business



Putting it all to work



Four years of integrated giving

A sample plan





Sample Program: Year 1

Annual Giving

- Begin with “What are we called to do?”
- Hold small gatherings to discuss
- Invite input via social media, bulletin inserts, etc.
- Use narrative budget to connect expenses to mission
- Increase personal contact around “ask.”
- Say “thank you” 7 times!



Sample Program: Year 1

Planned Giving

- Create sound endowment policies
- Put estate planning line on pledge cards
- Put planned giving brochures in tract racks





Sample Program: Year 2

Annual Giving

- Draw newcomers into the mission conversation.
- *Thank* people for what they made possible last year.
- Invite input via social media, bulletin inserts, etc.
- Update that narrative budget
- How personal are your asks? Can you improve?
- Remember to say “thank you!”



Sample Program: Year 2

Planned Giving

- Publicize your newly updated endowment policies
- Use that pledge card input to form a legacy society
- Schedule End-of-Life forum during Lent
- Do you need a Wills forum for young families?





Sample Program: Year 3

Annual Giving

- Mission conversation: “What’s next?”
- *Keep* thanking people.
- Update that narrative budget
- Continue social media, etc.
- Where do you have room for growth?
Visit these people.
- Consider faith & finance forum during Lent
- Remember to say “thank you!”



Sample Program: Year 3

Capital Giving: Discernment

- “What’s next?” We need more space!
- Discernment grows naturally out of conversation about mission.
- Small group meetings do double duty:
 - What could we do if had more space?
 - Considering the future excites people about the present.





Sample Program: Year 3

Capital Giving: Feasibility

- Feasibility study in spring identifies campaign goal.
- Feasibility identifies new PG prospects
- Planned giving creates new opportunities for participation



Sample Program: Year 3

Capital Giving: Solicitation

- Planning & recruiting during the summer





Sample Program: Year 4

Pulling it All Together

- Making the annual & capital ask at once
 - Daily mission & ministry come first
 - Then consider capital pledge
 - Capital pledges paid over 3-5 years



Sample Program: Year 4

Pulling it All Together

- Ways to integrate planned giving
 - Planned giving goal as part of total
 - Planned gift as alternative option
 - Combination cash gift & planned gift





Helpful Webinars on ecfvp.org

- *Stewardship for the New Millennium*
- *Year-round Stewardship*
- *Basics of a Capital Campaign*
- *Basics of Planned Giving*



Questions?

- Terri Mathes:
tmathes@episcopalfoundation.org
- Jim Murphy:
jmurphy@episcopalfoundation.org
- Or call: (800) 697- 2858

