

# ENCOURAGING GIFTS

*Creative Gift-Giving  
&*

*Planned Giving Programs  
for the Local Church*



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While the creation of an Endowment Program is not a prerequisite for a local church promoting and receiving planned gifts, it is a useful tool, and it helps to develop confidence among members who want to see that the church has "A *PLAN*" before they consider significant planned gifts. An Endowment Program will also open doors of opportunity for donors to make larger gifts from their accumulated assets than they might make as current gifts from their income.

Your church's ministry in planned giving and endowment funding can provide an exciting momentum for your church only if the members know about its many opportunities and possibilities. Organizing the Committee is never enough. Only when members and constituents understand the plans and catch the excitement and enthusiasm will planned gifts be made to fund the endowments which will benefit the Church.

Far too often in the local church we establish a committee, work out a plan, tell the congregation about it once, and then sit back and wonder why no one responds. It is critical that the work of the Committee include an on-going effort to help members and constituents understand how planned gifts can be beneficial to them and their church, to encourage (and assist) them in their gift planning, and to keep before them the value and importance of endowment funding in support of the mission and ministry of the Church.

One of the keys to any successful funding program is the communication of a clear vision of the mission and ministry of your church. People want to give, but in today's world it is not enough to simply say "You should give to the Church". People want to know how their gifts will be used to accomplish God's purposes through their church.

It is vital for success in the local church's planned giving and endowment program that members and constituents:

1. Understand and support the vision for mission and ministry
2. Know about the opportunities for giving
3. Understand the creative gift planning options available
4. Be given clearly defined and repeated opportunities to participate.

Not all persons are ready to hear your message at the same time. Some will respond the first time you give them an opportunity. Others will take longer to respond. That is why repeated efforts on your part are essential to success. There are times in everyone's life when they are more responsive than at other times. The key to your promotional efforts is to have the information readily available at those key moments.

Those key moments might include:

- Marriage
- Birth of a child
- Birth of a grandchild
- Death of a friend or family member
- Divorce
- Planning a long trip
- Reaching one of the "big birthdays" - 40, 50, 60, 65
- Receiving a large inheritance
- Having the last child leave home
- Changing occupations
- Changing place of residence
- Setting the retirement date
- Change in tax laws
- Major illness
- Suggestions by a professional (i.e. CPA, attorney)
- The need to dispose of property
- Selling the family business
- Selling real or personal property

As you can see, no one mailing or event will reach all the people at their key moment of receptiveness. You will need to include repeated ways through the year to inform your members of possibilities to respond. Let's look at some ways we might accomplish this in the local church.

## **A PROMOTIONAL PLAN FOR YOUR CHURCH**

The promotional plan you design for your local church needs to include the following elements:

- Education of Leaders
- Promotional Mailings
- News Items
- Special Programs
- Observances
- Acknowledging Donors

## **Education of Leaders**

The beginning point of any program to encourage giving within the church is with the leaders of the church. There may have been success with some church programs which use the strategy of saturating the entire congregation with information and then waiting for their response, but a program such as planned giving and endowment funding must begin with the local church leadership. A "law" which has proven itself many times over will prove itself again with this program --"Where the leaders lead, the congregation will follow". In other words, if the leaders do not support this effort, its success is compromised.

Inform church leaders about possibilities of giving to and funding ministry and mission through the Endowment Program emphasis. Does your church have "educational programs" for members of the Administrative Board /Council? If your church has scheduled two hours for a meeting, the business will probably take up the entire two hours. On the other hand, if a thirty minute "educational opportunity" is built into the agenda, you will probably discover that the balance of the agenda can be completed in the remaining one and one-half hours.

Several times each year, schedule presentations at the Board/Council meeting to present aspects of giving to and through the Endowment Program. Such presentations might include:

1. Have the Board brainstorm how an Endowment Program providing \$25,000 income annually (approximately \$500,000 in assets) could increase their vision of ministry and mission in your community.
2. Invite the Executive Director of the Conference/Area United Methodist foundation to visit and discuss with your Board/Council how a planned giving and endowment program can make a difference in your church.
3. Invite a local attorney specializing in estate planning to discuss the importance of every adult having a will and how charitable gift planning can be made a part of estate planning.
4. Let the chairperson of the Endowment Fund Committee (or another member of the Committee) make a brief presentation and lead a discussion on a particular charitable gift plan (such as the

Charitable Gift Annuity and other life income plans, giving real estate, giving securities, etc.).

5. Invite a local CPA or tax attorney to talk about tax matters related to charitable giving.
6. A presentation by a member who has made a planned gift and how it enabled them to accomplish various goals relative to the church's future, their church commitment, and all the benefits derived from the planned gift.

The Committee will want to provide reports no less than annually (and after the endowment program is well on track, perhaps quarterly) to the Administrative Board/Council – funds received, programs funded, items purchased, and ministries funded through the Endowment Program. Never *assume* the church leadership knows what is going on in this program. Keep them informed regularly.

Because the local church trustees may be concerned about this type of fund in the church, initiate conversations at least twice a year with them about the progress of the Endowment Program. Invite the Trustees to brainstorm how they could use funds generated from the Endowment Program. (Oftentimes property care and maintenance are popular causes when members consider making planned gifts to support endowments for the local church.)

### **Education of Members**

Members of the church are the ones most likely to make gifts to your church's Permanent Endowment Fund. They must be educated as to the importance of the Fund and they must understand how to make gifts to the Fund. Your educational program will likely use several different formats. In general, programs that engage people directly in a face-to-face, interactive manner are most effective.

- Workshops

These programs can be provided, free of charge by The United Methodist Foundation of Northern Illinois. A variety of topics and formats can be customized to your church's unique situation. Some topics include, but are not limited to:

1. Estate Planning
2. Wills Clinics
3. Living Wills and Ethical Wills
4. Bequests and outright gifts

5. Charitable Gift Annuities
6. Charitable Trusts
7. Types of Assets that Make Good Charitable Gifts

Workshops and seminars should be offered regularly (one or more times per year).

- Mailings

Direct mail is less engaging, but often a broader-reaching method to keep your congregation aware of estate planning issues and gift planning opportunities. The primary goal of these mailings is not to ask for money for any specific project or ministry, but to inform your members of ways they might give now or later through their estate plans. A goal of three or four mailings per year is preferable, but churches should not let limited funds for this many mailings prevent their starting with at least one.

Every mailing should include:

1. **A cover letter** from the pastor, Administrative Board/Council chair, or chairperson of the Endowment Fund Committee. A custom letter should be written to go with each brochure.
2. **An informational brochure.** The subject of this brochure might be:
  - Your church's endowment program or your memorial/honor fund program
  - Wills (one in a series of brochures on wills)
  - Gift plans (such as giving securities, giving through life insurance, giving real estate, giving through life income plans, etc.)  
*(The United Methodist Foundation can be helpful in suggesting these brochures and where they might be secured.)*
3. **Always enclose a response device.** Mailings, such as described above are designed to prompt one to respond. You can design a response card for each mailing. For example: a mailing on wills might include the following opportunities for response:



United Methodist Foundation  
 77 W Washington Street, Suite 1820  
 Chicago, IL 60602

Please send information on:

- Writing a will
- Making a gift to my church through my will or trust
- Other \_\_\_\_\_

Name \_\_\_\_\_

Church \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

For more information, please contact Janet Boryk 312-346-9766, extension 106 or via email at [jboryk@umcnic.org](mailto:jboryk@umcnic.org)

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- News Items

Articles in newsletters are excellent ways to remind members and constituents of gift planning opportunities. The best articles are stories of what has happened because of planned gifts to your church. For example, a brief article in the newsletter might tell about how "a portion of the earnings of the General Endowment Program this year was used to provide Bibles for every third grade Sunday School student in our church on Christian Education Sunday. You should have seen how the children's eyes twinkled with excitement when they received their own personal Bible...."

Short articles and news reports will be read more than lengthy pages of information. Remember -- If no one reads it, it doesn't really matter what the article or news report says.

Announce gifts to the Endowment Program as they are received (unless the donor has requested that his or her name not be announced). Providing a list of those who give and the names of those who are memorialized or honored is all that is necessary. Do not state the amount of the gift. How much someone gives now or through their estate is personal. Unless the family has given permission to share the size of a gift from one's will, that information should be kept within

the leadership of the church. Telling the congregation that gifts have been received, however, encourages others to give.

In addition to articles in newsletters, include short "one-liners" in newsletters and bulletins, on bulletin boards and hymnal covers, and any place where someone might notice them. One-liners might include:

- *Is your will up-to-date?*
- *Does your will include care of your minor children?*
- *Have you included your church in your will?*
- *Is your will keeping up with you? With your Christian commitments?*
- *Is the state's will your will or is God's will your will?*
- *A memorial gift goes on living and giving.*
- *Do you know how to make a charitable gift, and receive an income for life?*
- *Do you know you can make the church a beneficiary of a life insurance policy?*

▪ *Observances*

Designate a special time to remember those who have died during the year and to consecrate those gifts that have been received. The time used by most churches is either Memorial Sunday (May), All Saints Sunday (November), or Homecoming Sunday (or local church's anniversary celebration). Any time you plan such an observance can be appropriate, *but not planning such an observance is a mistake.*

An annual Endowment Fund Sunday or Planned Giving Sunday is also a time to project our vision for the next year. Use this time to share vision, goals and plans for special programs throughout the year. Every time you tell what has been done and what is planned, you have planted more seeds in people's hearts.

▪ *Acknowledging Donors*

The first thing we do when we see a list of donors is find our own name on the list (if we have given), or, if it is a list of memorials, we look for the name of our friend or family member who has been remembered. Recognition and appreciation go a long way in encouraging giving to and through the church for the ministry of Jesus Christ in the world. People need to know their giving makes a difference and is appreciated. People will oftentimes "say" they do not expect any recognition for what they have done, but not to give the proper recognition is a

mistake. The church sometimes does a poor job of saying "thank you". We often treat members and others who give as if they are just doing what they are supposed to do, and we therefore excuse ourselves as leaders of the church for not saying "thank you".

The best way to encourage repeat giving is to send a note of appreciation for every contribution. Establish a policy for your Permanent Endowment Fund Committee to send a short (preferably hand written) note of receipt and appreciation within a week of every gift. (In the case of regular contributions to the operating budget of the church, quarterly statements provide an acknowledgment of contributions, but in the case of planned gifts to the Permanent Endowment Program each contribution should be acknowledged individually.)

Unless anonymity is requested, the names of all donors should be honored and perpetuated in a Book of Remembrance. This Book of Remembrance should be kept in a public setting. This Book will not only recognize donors and lift up a memorial thought for the person remembered, it will also serve as a reminder to those who might consider making such a gift themselves.

- *Special Programs*

Special programs, presentations, workshops, and seminars are the next step in providing information about estate planning and gift planning opportunities. You might like to include the community in your announcements and invitations.

**These events should be designed for those who should be interested as well as for those who have already shown an interest in planned gifts and the Endowment Program.** In addition to announcing the special event to the whole congregation (and community), you will want to invite specific persons and groups of persons. Write a letter to those who have responded to any of your mailings, inviting them to your next special program. You might write, "Because of your special interest in this area, you will find this *Estate and Gift Planning Workshop* helpful in answering further questions you might have on this subject".

When an event is designed with a specific audience in mind and when you send specific invitations (in addition to the general invitation) attendance is usually much better. For example, you might design a workshop specifically for parents and invite them to a workshop on *Estate Planning for Parents*. You might design

a *Planning for Retirement Seminar* specifically for and invite those age 50 and older, or design an *Estate Planning Workshop* just for those who are retired.

Again, upon invitation from your church, the United Methodist Foundation will assist in planning and conducting a variety of targeted seminars. Foundation staff can also work with local professionals, most often estate planning attorneys, to include a range of material in the presentations.

Offer to present programs (and to assist in arranging for special speakers) for organizations and groups within your church, such as: United Methodist Women, United Methodist Men, specific church school classes, or the senior adult fellowship.

Plan each event well in advance of the announced date, allowing six weeks to two months for promotion. Once a date is set, invite the leaders and secure a commitment from them. Your chances of success in scheduling the best leadership will depend upon several factors, not the least of which is the lead time before the event, the level of enthusiasm you communicate, and the evidence of good planning on the part of the Endowment Fund Committee.

There are many options when it comes to appropriate events to lift up the causes of estate planning, gift planning, and endowment funding for the local church.

- Estate and Gift Planning Workshop
- Wills Clinic
- Christian Financial Planning
- Estate Planning Seminar
- Charitable Gift Planning Seminar

*(The following examples of an agenda for an Estate and Gift Planning Workshop and an Estate Planning Seminar might be helpful.)*

## **ESTATE AND GIFT PLANNING WORKSHOP**

*You might want to consider inviting a staff person from the United Methodist Foundation to lead this workshop. Special attention needs to be given to subjects to be covered and time limitations for all speakers/leaders.*

- I. Opening (15 minutes)
  - Welcome
  - Devotional
  - Statement of purpose for the workshop
- II. Introduction to Estate Planning and Charitable Gift Planning (5 minutes)
  - Estate Planning
  - Charitable Gift Planning
- III. My Will (30-40 Minutes)
  - What is a will?
  - Who can make a will?
  - Who needs a will?
  - What can a will do? Not do?
  - What does a will cost?
  - Can my will be changed?
  - How often should it be reviewed?
  - What about estate taxes?
  - How can I remember the church in my will?
- IV. Revocable Living Trusts (45 Minutes)
  - What is a Revocable Living Trust?
  - How does it work?
  - Things to include in the Trust and things not to include
  - Who should consider a revocable living trust?
  - How much do they cost?
- V. Creative Gift Planning (30 minutes)
  - Benefits of charitable giving
  - Cash and bequests
  - Life Income Gifts
  - Other types of gifts
- VI. Closing Prayer (5 minutes)
  - Thank all who attended
  - Invite attendees to complete evaluation form
  - Invite attendees to pick up displayed/available resources
  - Invite attendees to remain and discuss personal matters with leader(s)

***FOLLOW-UP:*** One of the keys to success in a program like this is "follow-up".

During the week following the event send those who attended a brochure (linked to the theme of the program) and a letter of appreciation for their attendance. Invite their response to the event and inquire to see if they need any additional information. The United Methodist Foundation publishes a newsletter, and is willing to add those who attended to the mailing list. The information in this newsletter will be supportive of what you are doing in the local church, and it will inform your members there is professional assistance beyond their local church available to them.

### **MODELS FOR THE LOCAL CHURCH**

The following two models offer suggestions for promoting estate planning, planned giving, and endowment funding in a local congregation. Model One is the "premier model". It is the most comprehensive. Model Two might be considered by those churches which find Model One too comprehensive for the early stages of their program; but if your church starts with Model Two, you are urged to upgrade as soon as possible to a more comprehensive model.

## **MODEL ONE**

### "A Three-Year Plan For Promoting Your Church's Planned Giving Emphasis"

#### **YEAR ONE:**

*Two educational presentations* to Administrative Board/Council during the year.

#### **Mailings:**

*February:* Endowment Program promotional brochure

*May:* Wills series brochures

*August:* General planned giving brochures

*Quarterly articles in the newsletter.*

**One-liners in the bulletin** *each month*

Estate and/or gift planning workshop *at best time for the local church*

**Memorial Observance or service of Remembrance** *on appropriate occasion*

**Target group presentations** *as often as possible*

#### **YEAR TWO:**

*Quarterly educational presentations* to Administrative Board/Council.

#### **Mailings:**

*February:* Wills series brochures

*May:* Estate Planning brochure

*August:* Wills series brochures

*November:* Life Insurance brochure

*Monthly articles in the newsletter.*

**One-liners in the bulletin** *twice each month*

Estate and/or gift planning workshop *at best time for the local church*

**Memorial Observance or service of Remembrance** *on appropriate occasion*

**Target group presentations** *as often as possible*

**YEAR THREE:**

*Quarterly educational presentations* to Administrative Board/Council.

**Mailings:**

*January:* Wills series brochure

*March :* Living trusts brochure

*May:* Wills series brochures

*August:* Planned giving brochures

*November:* Year end giving brochure

*Monthly articles in the newsletter.*

**One-liners in the bulletin** *twice each month*

Charitable gift planning workshop *at best time for the local church*

**Memorial Observance or service of Remembrance** *on appropriate occasion*

**Target group presentations** *as often as possible*

## **MODEL TWO**

### "A Two-Year Program of Promoting Planned Giving"

#### **YEAR ONE:**

##### *February*

1. Make **presentation at an Administrative Board/Council meeting** to church leaders on giving through endowments, memorials and other planned giving vehicles.
2. Distribute a **flyer on planned giving opportunities**.

##### *May*

- Send a **mailing to the entire congregation** about giving options through the church's Endowment Program. (enclose a copy of the Permanent endowment Fund brochure)

##### *September*

- Make a brief **presentation at the Administrative board/Council meeting** and **conduct a brief, anonymous written survey**. Promise – and keep your promise – to report back to them on the results of the survey.
- Sample Survey
  1. Do you have a will?
  2. Have you included your church in your will?
  3. Would you consider adding your church in your will?
  4. Would you like more information about ways to include your church in your will? (If "yes", please give your name.)

##### *November*

- Publish the results of the will survey in the newsletter
- Send a mailing to the congregation about **the advantages of giving at year end**.

**Use one-liners** for bulletin and newsletters *at least 4 times during the year*.

**Target group presentations** *as often as possible*.

## **YEAR TWO:**

### *January*

- Make **presentation at an Administrative Board/Council meeting** to church leaders on giving through endowments, memorials and other planned giving vehicles
- **Insert an article in the church newsletter** about the importance of having a will.

### *March*

- Host a **wills clinic and gift planning workshop**
- **Follow up** with those who attend

### *April through September*

- Place a short article in the church's newsletter at least once each month about planned giving, the church's permanent endowment fund, estate planning...

### *October*

- **Send a letter and brochure** to the congregation about giving through wills and trusts

### *November*

- **All Saints Day remembrance** and recognition service

**Use one-liners** for bulletin and newsletters *at least 4 times during the year.*

**Target group presentations** *as often as possible.*