

5. Set up an in-home visitation to discuss planned giving;
6. Invite them to a planned giving seminar if available; and
7. Ask them to make a planned gift.

To touch on all these points and be able to ask the individual to consider a planned gift may take a series of contacts or visitations. This process must be handled delicately, always listening and being sensitive to the individual's concerns. It is important that the caller be low-key and strive to build rapport with the individual. There may also be a point where it is appropriate or necessary to involve the parish priest in the conversation. The committee should keep the parish priest informed when a parishioner is considering a planned gift so that he may be sensitive to the situation and respond appropriately if asked.

The process of education, cultivation and bringing the planned gift to closure may take a series of contacts over an extended period of time. Planned gifts are thoughtful actions that involve larger assets. Parishioners will require differing amounts of time and information to make decisions about planned gifts. Be patient and persistent. Be sure to log all contacts with detailed notes kept in a confidential file.

Unlike the stewardship campaign, planned giving has no immediate deadline. It is critical that the Planned Giving Committee keep careful records in order to sustain communications with interested individuals over a period of years.

#### OTHER CONSIDERATIONS

##### 1. Unrestricted Gifts

Gifts with no restrictions placed on them are the most helpful to the parish in supporting their growing ministries. Individuals considering large gifts may be more inclined to make a gift if the funds could be dedicated to a specific purpose or placed in a specific fund.

##### 2. A Church Endowment fund

Consider setting up a separate fund at the church for long-term gifts from which only a percentage of the growth or assets may be taken each year. Often people are more comfortable giving large gifts when the gift is given special treatment that will allow it to support the Church for many years to come.

##### 3. Dedicated Funds

If the donor wants to dedicate their planned gift to a specific purpose, then a dedicated fund must be established for that gift. Any gift given in this manner must only be used for the purpose it was given. This type of giving should not be encouraged as it makes bookkeeping difficult and as a parish evolves in its ministries, the original purpose of the gift may no longer be relevant to the current situation.

#### Contact these Archdiocesan Offices with questions or for further assistance:

Stewardship Ministries	Telephone 646/519-6160	E-mail <a href="mailto:Stewardship@goarch.org">Stewardship@goarch.org</a>
Office of Parish Development	Telephone 847/478-5275	E-mail <a href="mailto:JMinetos@goarch.org">JMinetos@goarch.org</a>

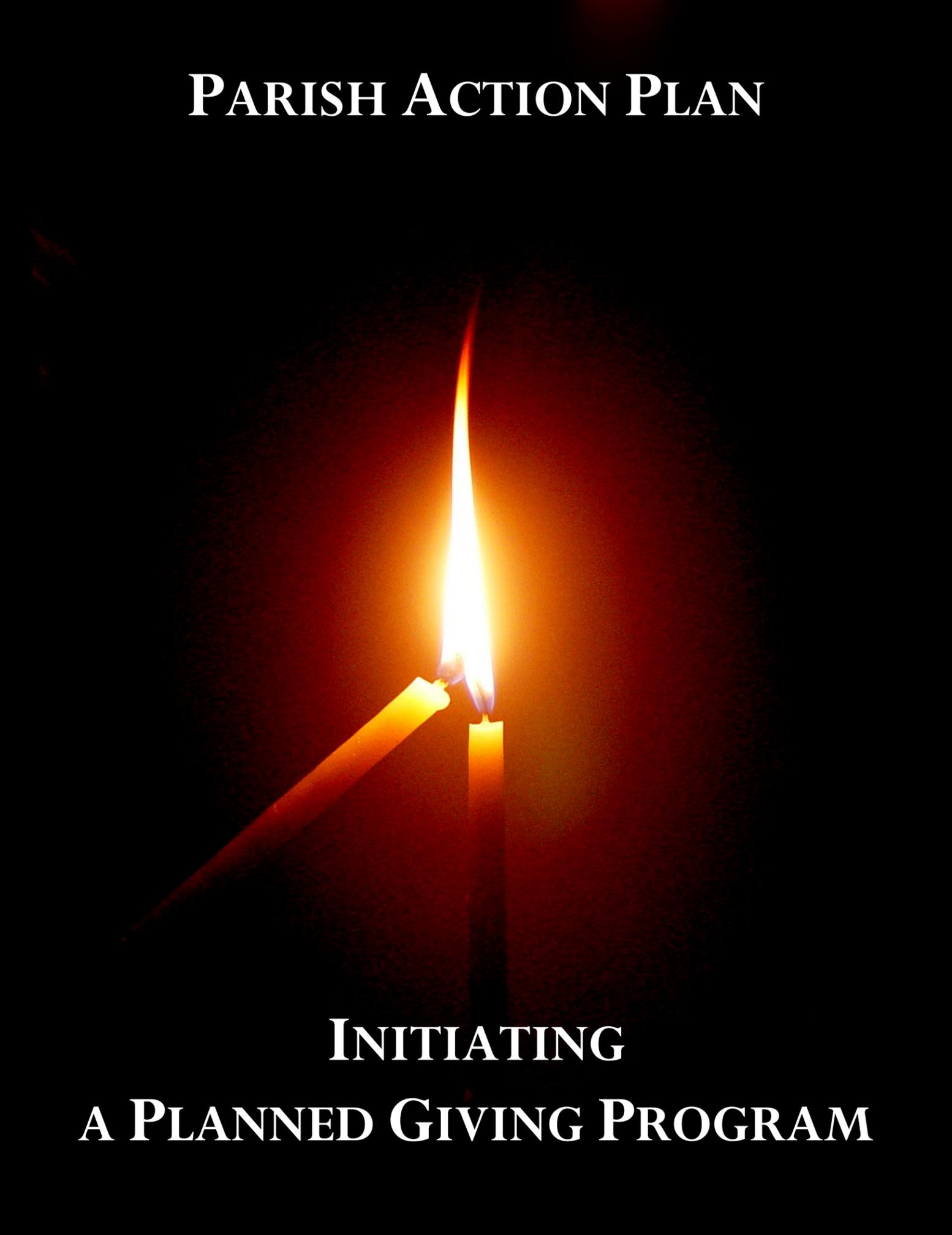


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**STEWARDSHIP MINISTRIES**  
**GREEK ORTHODOX ARCHDIOCESE OF AMERICA**

# PARISH ACTION PLAN



**INITIATING**  
**A PLANNED GIVING PROGRAM**

# INITIATING A PLANNED GIVING PROGRAM IN YOUR PARISH

## BUILD A PLANNED GIVING COMMITTEE

For any program to be successful, it requires the support and participation of both the parish Priest and the Parish Council. A Planned Giving Committee, appointed by the Parish Council with the guidance of the parish priest, offers visibility and credibility to the program. The committee may include:

- Current and Past Members of the Parish Council and/or Stewardship committee;
- Selected professionals with expertise in the field – attorneys, accountants, etc.;
- Past Donors; and
- Volunteers who are willing and able to solicit planned gifts.

Members of the committee should be from diverse spheres of influence to provide personal contact with the largest number of parishioners. It will also provide for diversity of experience and knowledge necessary for a successful committee. Professionals will offer expertise and technical information to the committee; past donors will provide insight and are often the best solicitors of new gifts; and volunteers who are willing and able to ask for planned gifts is essential.

Those who are recruited should understand that this is a working committee. The first priority will be to design, implement and manage the planned giving program. Members of the committee must be willing and able to identify prospective donors, develop strategies for the program and ask prospective donors for planned gifts. It is also important to identify professionals that would be willing to provide advice or answer parishioner questions on a confidential, no-obligation basis. (One mid-west parish has a volunteer attorney that prepares wills for parishioners at no charge if they leave a bequest to the Church)

## DEVELOP AND WRITE THE CASE FOR PLANNED GIVING IN YOUR PARISH

Research has shown that people want to make the Church part of their planned giving – bequests, cash, appreciated assets, insurance, real estate – but the reality is that they are rarely asked to do so. It is important to develop clearly the reasons why such gifts are needed. The reasons are many and varied. The basis for planned giving to the church is scriptural and theological. It is also often a person’s desire to leave a legacy, ensuring the viability of the parish and the Church for future generations. Every local parish will have a slightly different case based on many factors. It is important for parish leadership to develop the case for planned giving to the Church so that donors and committee members understand the basis for the initiative.

Once the case for planned giving in your parish has been developed, it might be helpful to meet with select members of the parish to discuss the material. Past donors might be particularly helpful in reviewing the case for planned giving and also in explaining why they made gifts to the Church and how the parish might have made the process easier and more fulfilling for the donor. It may also be helpful to set up a focus group of past and potential donors to get their reactions to the case for planned giving. A sample case for planned giving is offered here:

### THE CASE FOR PLANNED GIVING – A SAMPLE

**The Church is the Body of Christ** on earth and carries on His ministry in the world today. Giving to the Church is an opportunity to examine our priorities and values, to express our thankfulness, to give of ourselves and to grow in grace.

Through a charitable gift, you can make a significant positive effect on the ministries of the Church and those people whose lives are changed because of them. The impact of your gift will be felt for years and generations to come.

A charitable gift may also give you substantial current tax benefits as well as estate tax benefits.

For most people, the greatest financial gift we are able to give is what we leave behind when we fall asleep in the Lord. Planned giving can be very rewarding, allowing to you to see your gift at work while receiving tax benefits now.

Giving to the Church is an opportunity to examine our priorities and values. It is an opportunity to express our thankfulness, to give of ourselves and to grow in grace. Come and See what we can do together with your support.

A gift to the church is most meaningful when accompanied by our presence, our willingness to serve, our prayers, and our commitment. Giving is not a substitute for our commitment – it is an expression of our commitment.

**“Come and See** the works of God, Who is awesome” (Psalm 66:5).

## RECOGNIZE DONORS: The Eternal Light Society

A program to recognize donors in appropriate ways is an important component of a planned giving program. The ultimate benefits and results of the gift often lie in the distant future. The opportunity for the donor to receive current recognition provides a link to the present. Public recognition must always be approved by the donor. Also, if desired, the donor should be given an opportunity to remain anonymous.

It is suggested that an **Eternal Light Society** be established as an organization of all that have made a commitment to support the ongoing ministries of our Church through a planned gift. Regular meetings, luncheons, dinners, newsletters, financial planning seminars, annual artoclasia, annual memorial service and more could make up the various programs and benefits of the Eternal Light Society.

## EDUCATE YOUR PARISHIONERS

Communicate the case for planned giving often – at every opportunity – from casual conversation to formal written materials and seminars. Every bulletin and newsletter should refer to planned giving – even one line saying “REMEMBER THE CHURCH IN YOUR WILL”. Include planned giving on your pledge card as an indication that the individual would like to make a planned gift or receive information on planned giving. As often as possible, communicate the case for planned giving in your parish. Use posters and other material supplied by the Archdiocese. Provide sample forms and language. Consider having committee members make a presentation to the parish’s seniors club, or to any interested group. Also consider having parish professionals sponsor an “Estate Planning” seminar. If held, include planned giving, the use of trusts and the importance of a Living Will.

When doing estate planning it is common to also include a “Living Will”. This deals with the way in which medical care will be provided if you can’t give the instructions yourself. For our Orthodox faithful, it is important that the Living Will reflect an Orthodox perspective. There are many prayers and observances that can give great comfort to the patient and family. These may be missed if the Living Will doesn’t reflect an Orthodox perspective. It is critical that the importance of a Living Will that reflects Orthodox be made very clear. Remind parishioners that the Church insists that the body be buried and does not grant funerals or memorial services to persons who have been cremated.

Remember that Planned Giving is a long-term process. Remind people subtly but often. The effort will likely require many different segments: mailings, posters, group meetings, seminars, in-home visitations, etc. Often the “Legacy gift”, or bequest, is the largest single gift a parishioner will make to the Church. It usually takes time for people to become comfortable with the concept and to make the effort to prepare the necessary documents. To make people more comfortable enlist professional advisors from among your parishioners. Invite them to hold seminars on planned giving and present the church as a worthy recipient. Ask that they offer their services for free as long as the result is a gift to the church.

## IMPLEMENT A SOLICITATION PROGRAM

This program should be implemented in the parish in coordination with the stewardship campaign, avoiding overlap of effort but taking advantage of the opportunity to discuss both current and planned giving. The Stewardship information which is mailed or given to parish membership should include some reminder to consider planned giving. The pledge card may also include a check box for the individual to indicate a desire to receive more information or to attend a seminar on planned giving.

If the stewardship team is implementing a home visitation program, planned giving should be included in their conversation and the names of interested individuals should be referred to the Planned Giving Committee.

A mailing dedicated only to planned giving should be preceded by lead-up information in bulletins, newsletters, announcements and posters. Sample wording might be “REMEMBER THE CHURCH IN YOUR WILL: Watch your mail for further information.”

A mailing would require immediate follow-up, so the committee should be prepared with a plan to contact parishioners personally or by telephone within a week or two after the mailing. Personal contact is more effective and the nature of these contacts is very low-key with the primary goal to:

1. Ask if they’ve received the material;
2. Listen to the parishioner’s concerns;
3. Educate on the case for planned giving;
4. Ask if they would like to talk to a professional on a confidential, no-obligation basis;