Encouraging the Joy of Generous Giving

Keys to the Effective Planned Giving Program
Planned Giving Myths

- Only the wealthy make planned gifts
- Only those with no children/heirs will give a gift from their estates
- All attorneys and financial advisors know the value of charitable gifts
- Those who are not wealthy really do not need to consider a planned gift or an estate plan
- Planned gifts are always deferred.
What Is Planned Giving?

- Opposite of Unplanned Giving
- A process of charitable giving in which financial, family, tax, and institutional considerations are explored prior to the completion of the gift.
Charitable Giving Is COMPETITIVE

Why Give to You?
The most important factors in any planned giving effort are:

- The church has clearly defined:
  - Core Values
  - Mission
  - Vision
  - Strategies

- The church has a clear strategic plan to achieve its goals and objectives

- In other words... The church knows where it is going and knows what it will take to get there.
Planned Giving: Two Distinct Perspectives

- Secular fundraising:
  - Based upon “philanthropy” – love of humankind
  - Assumes donors own the resources
  - Objective is to get “owners” to give up some of “their” resources for charitable purposes
  - Usually transactional
  - Based on affinity of donor to organization
Planned Giving: Two Distinct Perspectives

- Distinctively Christian planned giving:
  - Based upon God’s ownership of everything
  - Assumes we are entrusted as stewards to be generous
  - Objective is to invite God’s stewards to invest the resources entrusted to them in ministry
  - Should be transformational
  - Based on personal call and spiritual growth
Key Elements of Faith-Based Planned Giving

- Effective relationship building
- Integrated communication and marketing
- Comprehensive data management
- Theologically reflective leadership
- Solid church leadership support and involvement
- The 3 P’s
Effective Relationship Building

- Who are the church’s constituents?
  - Members? Friends? Worshippers? Community?

- Relationships are as real & as close as possible
  - Genuine relationships with intentionality
  - Major donors require in-depth relationship
  - Scope of relationships determined by staff size

- Filters: Capacity ~ Affinity ~ Timing

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Storytelling is crucial
- Mission, Vision, and Values are foundational
- Stories of mission fulfillment and impact are key

Entire church must communicate a consistent message
- Tell the story well
- Tell the story in various ways with consistency
- Tell the story over and over

Communication and marketing should be integrated with fund development
Case Statement Is . . .

- A carefully prepared document that sets forth, in detail, the reasons why an organization needs and merits financial support and why an aligned donor might consider financial support
- Compelling
- Rationale, emotional, and spiritual
- Optimistic
- Brief
- Easy to interpret & remember
- Larger than the organization
- Has broad appeal
- The single most important document in the fund development effort
- Basis for the consistent message and storyline
Case Statement

- Core Values
- Mission
- Vision
- Strategies/Initiatives/Implementation
- Sense of Urgency (stated in a positive)
- Why Us? (Unique Organizational Position)
- Brief Church History & Current Support
- Specific Financial Goals
- Repeat Sense of Urgency & Invite Participation
Comprehensive Data Management

- Relationship management
  - Keeping a record of each contact in key relationships is crucial
  - Staff & volunteers must adhere to the discipline of capturing and recording relationship information

- Gift processing and receipting
  - Absolute accuracy in gift records is essential
  - Make sure gift entry personnel are well trained
  - Send receipts and personalized thank-you letters out quickly
  - Follow-up is essential for significant gifts
Theologically Reflective Leadership

- Staff and volunteers are clear that multiple levels of the organization’s work is God’s work.

- To practice distinctively Christian fund development, leaders need to grasp the underlying theology of generosity.

- The volunteers are equipped to reflect theologically.

- Staff and volunteers share values and a theology of generosity.
Solid Church Leadership
Support and Involvement

- The trustees have fiduciary responsibility for the church, thus planned giving promotion and management involves their oversight.

- The trustees need to be trained in both the theology and practice of distinctively Christian fund development & *Book of Discipline* requirements.

- Requires a development/advancement team or endowment committee for peer modeling and influence.
Let’s Learn the 3 P’s

- Positioning – creating the environment
- Promoting – introducing the plans
- Programming – encouraging the next steps
Positioning

creating the environment

- Do you have policies?
- Do constituents know the policies?
- What signals are you sending?
Why Do People Give?

Key Motivators

- They believe in the mission.
- They believe that the organization is changing people’s lives.
- They were asked to give by someone in whom they have confidence.
  - Display respect for the staff.
  - People give to people.
- They perceive that the organization is fiscally stable.
Why Do People Give?

Key Motivators

- Their peers are giving
- For recognition
- To ensure the organization’s ability to reach its mission in the future
- To ensure their pet project finds a home
- To be generous
- For tax shelter reasons
Why People Do NOT Give?

- Infrequent or poorly communicated invitations
- Cannot envision difference gift makes
- Never feel wanted or needed
- Receive no direct or personalized appeal
- Gave an unacknowledged gift in past
- Timing was not right
- Mission not compelling
- Not asked to give
Promoting introducing the plans

- Motivation & incentive
- Communication – newsletter, website, bulletin, letters, announcements, testimonies
- What can we offer to encourage planned giving?
Programming
encouraging the next steps

- Delivering planned giving information
  - Estate & Gift Planning Workshop
    - Creative Giving Workshop
    - Annual Memorial Service
    - Legacy Celebrations
    - Premiums
Vocabulary Matters

- Our words need to reflect our values and our approach
- Internal communication is critical to creating the culture and ethos of generosity
- External communication must be consistent with the church’s core values
The most common reason people express for not giving to an organization is:

They were not asked to give!

"People do not drift into good giving habits. They decide into them. The reason they decide is because someone asks them to decide."

~ Herb Miller
The Process Leading to the Invitation!

- Identify constituents
- Build a prospect donor list
- Profile and research these prospective donors
- Begin or continue building a relationship with these potential donors
- Encourage greater involvement in regional ministries and events
- Remind them of the case for support
- Determine likelihood of support
  - Call
  - Capacity
  - Timing
The Invitation!

- An in-person meeting
- Briefly review case statement
- Slow the discussion
- Spiritual discernment
- Be specific about the “scope” of the gift - lead, major, matching, peer, level
- Summarize benefits
- Provide a gift range
- Be clear, concise, no doubt about asking
- Be quiet! Stop talking
- Respond appropriately

An invitation to the spiritual gift of generosity
Planned Giving as Ministry

- Planned giving relationships lead to spiritual growth
- Planned giving is a ministry of Christian organizations
- Spiritual work requires spiritual tools – form a prayer ministry team
- Challenges will come . . .
  - From within the organization system
  - From constituents
  - From the staff
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Helping Faithful People Live Generous Lives