

Ready to start a planned giving program?

Here are some steps that will help ensure the start of a program that will be easy to maintain and grow.

1. Create an endowment to receive donor gifts
 - Establish an endowment fund to receive donor gifts
 - Create a governing board or committee
 - Form a simple, clear statement of purpose
 - Establish policies and guidelines to assure good stewardship of those gifts – such as disposition of bequests, use of designated gifts, investment policy, spending rules for the endowment, and gift acceptance guidelines
 - Communicate during the process with the congregation and update annually
2. Create a legacy society to honor those who include your parish in their estate plans
 - This will help donors stay connected and content with their commitment
 - It will raise awareness and educate potential donors
 - Define a period for founding members and then publicize the new society
 - Stay in touch quarterly with the members and plan annual event for the members
3. Establish an education/awareness program
 - Keep the message simple, start with wills
 - Develop a year-round plan – multiple approaches that will appeal to all members
4. Create a system for receipt and acknowledgement of gifts
 - Identify contact person who will assist with the gift
 - Acknowledge the gift – who will send this
 - Administer and manage the gift – what is the process for deposit, notification of appropriate leadership, and reporting on the impact of the gift.