



ELCA Foundation
Evangelical Lutheran Church in America
God's work. Our hands.

Encouraging Gifts: Building your mission endowment fund

"You are the people of God: he loved you and chose you for his own...Everything you do or say, then should be done in the name of the Lord Jesus giving thanks to God."

- Colossians 3:12-17

Giving through accumulated, inherited, and appreciated resources may be called "asset stewardship." A Christian is called out of the water and Word of baptism to respond faithfully to God's grace in Christ. God has acted in love towards us, calling us to respond with acts of kindness towards others. As people of God, we are encouraged to give proportionately from our accumulated resources during life or at death. As "asset stewards" planning for the distribution of all lifetime accumulations, we take a vital step in completing our stewardship plan.

So now you have established your congregational mission endowment fund. What's next?

Many congregations of the Evangelical Lutheran Church in America have initiated a mission endowment fund to encourage gifts to the ministry of the church through accumulated, inherited, and appreciated financial resources. These mission endowment funds provide support to mission beyond the operating budget of the congregation.

A mission endowment fund only works if there is money in the fund. The challenge to the congregation and the leadership of the mission endowment fund is to encourage the membership of the congregation to grow in whole life "asset stewardship."

Here are just a few ideas as a resource to help your congregation grow its endowment fund in order that mission outreach programs may reach others in Christ's name.

The ministry of "asset stewardship"

The central role of the mission endowment fund is to enhance the mission outreach of the congregation by introducing members to "asset stewardship" and encouraging their growth in whole-life giving. Remember to coordinate efforts with annual stewardship. Giving to the congregation's mission endowment fund is a continuation of annual giving of income. Leadership can focus on their role through these four actions—educate, encourage, enlist, and excite.

Educate

Share the mission and vision of the mission endowment fund. Help members to see how it fulfills the congregation's mission statement to make Christ known in all the world. Create a program through printed communication, seminars and other media resources which teach people about planned giving and charitable estate planning.

Encourage

Provide ongoing events and programs which assist in each member's own journey of

realizing their charitable dream. This would include highlighting the programs which the mission fund supports or would like to support, as well as asking the congregation what ministries they would like to see receive support.

Enlist

Invite and ask individuals for their commitment to the mission fund. Both current and planned gifts of accumulated assets can be beneficial.

Excite

Celebrate the 'gift of giving' within the life of the congregation. This means saying thank you for the gifts from faithful stewards! Occasions for celebration provide opportunity to educate, encourage & enlist the participation of others. Celebrate the distributions made to various ministries and other programs...say thanks seven times.

Creating a plan to encourage giving

The mission endowment fund leadership must put a working plan into place.

Three suggested action steps:

- Write a mission or purpose statement of the mission endowment fund and share it with others of the congregation. Develop a brochure and include your mission statement.
- Encourage each member of the committee to make their own personal commitment of a portion of their accumulated assets to the mission endowment fund.
- Devise a schedule of events and programs to be initiated over the next two years which will educate, encourage, enlist and excite others for the mission endowment fund in your congregation.

A strategy for promoting your mission endowment fund:

Once the mission endowment fund has been established it is important to educate the congregation about the fund. Monthly articles in the congregation newsletter are a good way to keep members informed. The following is a sample outline of a twelve month education plan. Its implementation can be the duty of the mission endowment fund committee.

Month 1: Establish a "Kick-Off Sunday." Each Sunday of this month, the bulletin should include a line, "It's coming," with the date for this introduction to the mission endowment fund. Adding, "Mark your calendar and plan to attend" is another prompt that is helpful.

Month 2: Continue the above announcement until the Kick-Off Sunday has arrived. On the Kick-Off Sunday invite Lisa Higginbotham, Regional Gift Planner to be a part, preach, lead the adult form and/or sponsor a luncheon highlighting wills and gift planning.

Month 3: Include in this month's church newsletter an article on planned giving and sample ways to make a charitable gift. Resources for these are available on the ELCA Foundation website.

Month 4: One Sunday this month have a bulletin insert with information on the mission endowment fund. Include a tear-off piece: "Please send me more information on how I can

make a gift." (Note: Some congregations prefer to have members send their response card to the regional gift planner so that the consultation is confidential).

Month 5: Host a temple talk, preferably a personal witness by someone who has made a planned gift to the congregation and other ministries of the ELCA.

Month 6: Emphasize in this month's church newsletter article the purpose of the mission endowment and what will be accomplished because of people's generosity. Include a sample statement of how a person can include the church in his or her will.

Month 7: Have an adult forum with a panel to share information and answer questions on charitable giving. Include on the panel: an insurance agent, an attorney, a financial planner or CPA, and Lisa.

Month 8: Hold an afternoon or mid-week legacy seminar. Invite the same group as above. In your newsletter this month, explain how a charitable gift annuity works.

Month 9: Distribute the congregation's endowment brochure to every household in the congregation. The following are listed in order of the most effective ways to accomplish this:

- committee members can personally deliver them to each household
- phone members and tell them to watch for the brochure in the mail, then mail the brochure
- mail the brochure with a personal hand-written note from a committee member offering to answer questions

Month 10: Each Sunday of this month, have a brief temple talk on planned giving (a personal witness is best) or read a story on what a planned gift has done to further the gospel message.

Month 11: Include an opportunity to make a planned gift commitment on your annual stewardship pledge or commitment cards.

Month 12: Include in this month's newsletter an article on what the endowment committee has accomplished over the past twelve months.

Have fun throughout the year: Celebrate every gift that is received (with the donor's permission or anonymously). This is an inspiration for others to make a planned gift. Also share with the congregation where distributions have gone. If possible have a recipient or representative from a recipient organization come and speak at Sunday worship.

A sample mission endowment fund calendar to promote planned giving:

January—Mail a letter to members of your congregation suggesting they make a New Year's resolution to write or update their wills. If possible, send this letter over the signature of someone who has already remembered the church in his or her will. Include a brochure containing information about gifting vehicles. Include a response devise to request additional information. Display extra brochures in a visible location at the

church. Suggest the wording of the Christian Preamble as a faith statement in their will.

February—Publish an article in your church newsletter telling the story of an individual or couple who has made estate plans that include your church.

March—Publish a letter to congregation members in your newsletter outlining information about your congregation's mission endowment fund.

April/May—Publicize "Leave a Legacy for Ministry" month that will occur in June. A temple talk testimony from someone who has benefitted from endowment gifts (such as a scholarship recipient) adds credibility. Host a "Leave a Legacy for Ministry" open house for those who have already included the church in their estate plans or are considering doing so. (This social event may be held at a location away from the church building.)

June/July—If you have identified them, talk with people who are interested in remembering your congregations in their wills. Help them with their estate planning needs, or put them in touch with professional advisors who can assist. Welcome new "Willing Witnesses" or "Mission Expanders" as they share their plans to make a future gift.

August/September—"Piggyback" will and estate planning information with the annual stewardship campaign promotional materials. Work together with the stewardship campaign team. One way is to suggest that appreciated assets may be used to fulfill one's annual pledge. For someone who can't make a substantial pledge but would like to give more, an estate gift may be the right answer.

October—Emphasize end-of-the-year tax planning ideas. Invite people to attend a November seminar on financial and estate planning. Work through a church committee or group to sponsor the seminar. Promote this educational opportunity in the congregation's newsletter and Sunday bulletins.

November—Conduct a seminar during the Sunday school hour or other time this is likely to draw attendance. Follow-up with people who request additional assistance.

December—Plan next year's calendar.

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