



Growing Your Endowment: A Planned Giving Campaign?

ELCA Foundation



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Evangelical Lutheran Church in America
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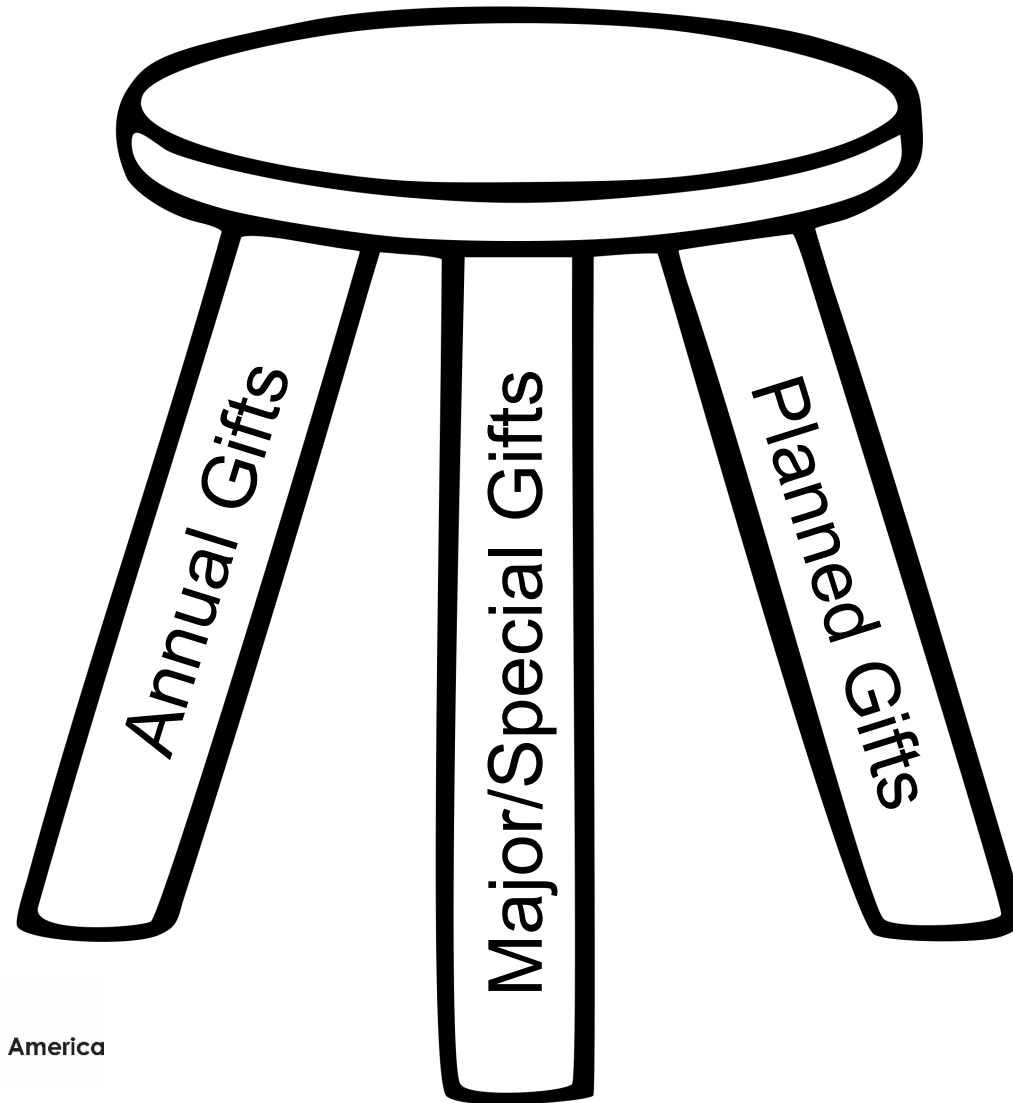


Agenda – Growing Your Endowment

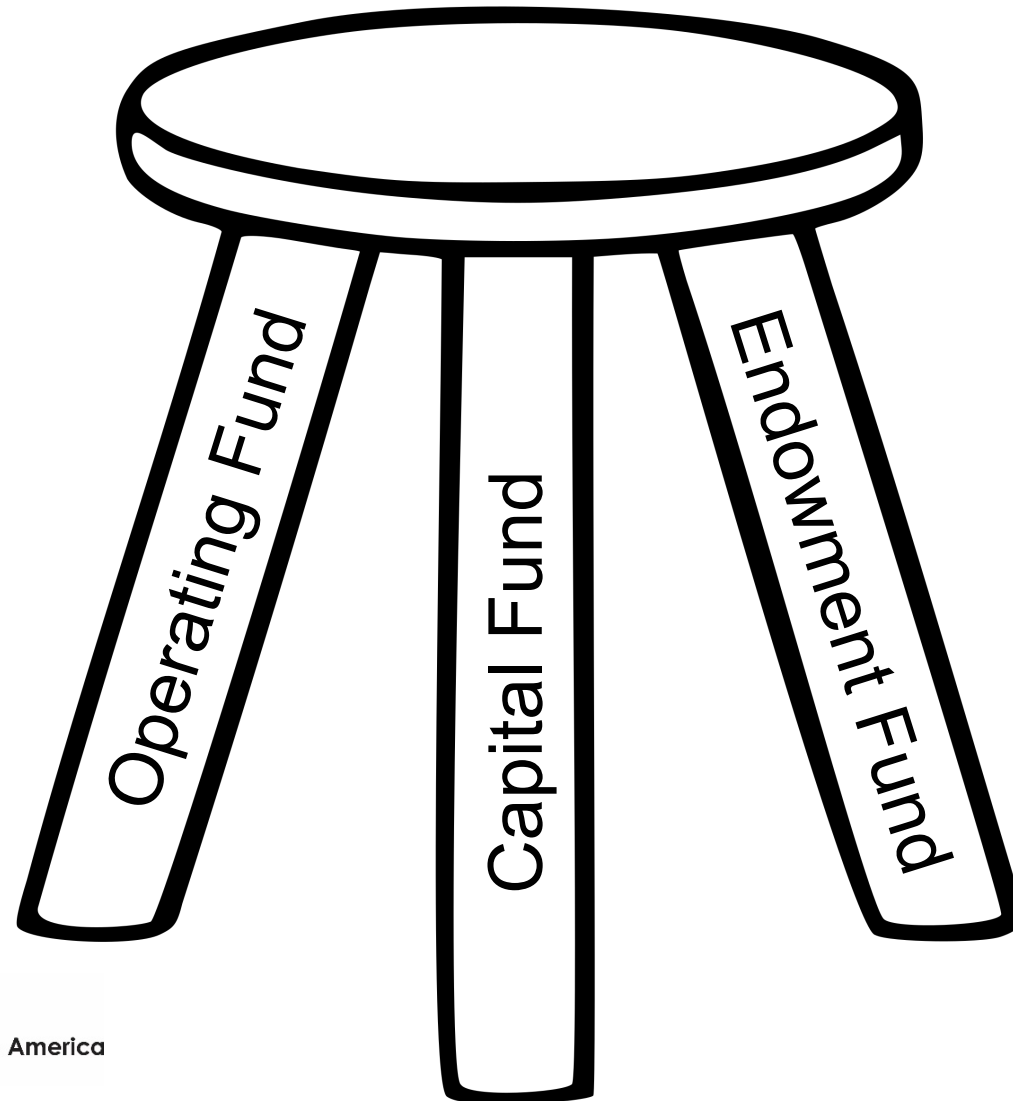
- Giving Statistics and Information
- Establishing a Good Foundation
- Make a Plan



Three-Legged Stool of Fundraising



Three-Legged Stool of Fundraising



Definitions



Annual Gift/Operating Fund - Regularly given, unrestricted gifts to an organization.



Major Gift/Capital Campaign – Special gift (one-time or pledged.) Often tied to a campaign and typically have a minimum value.



Planned Gift/Endowment Fund – Gift enacted now to be realized later. Legacy/estate gift. Transformative and long-term gifts.





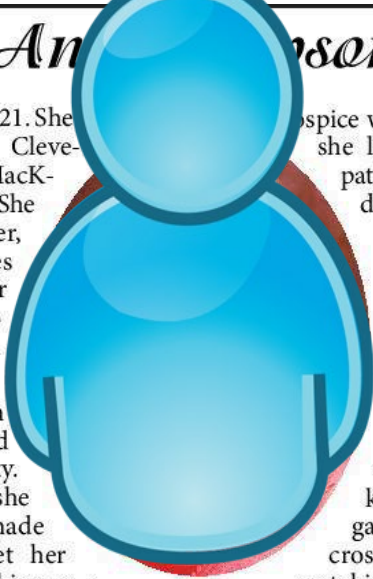
The Giving Gap

- 28% - Of 2020 Contributions went to Religion*
- 10.7% - Average bequest dollars to religious organizations (1986-1998)**
- 5% - Of planned giving donors said their largest gift was going to a religious organization***
- 75% - Of congregations who reported membership deaths did not report any bequest gifts.



Where Does the Legacy Go?



Ann  *son*

Ann died January 25, 2021. She was born January 2, 1935 in Cleveland, OH, to Josephine MacKenna and J. Harry White. She and her younger brother, Jim, grew up on the shores of Lake Erie until their father was transferred to Portland, Oregon, when she was 11 years old.

Ann graduated from Grant High School and Willamette University. While at Willamette, she joined Pi Beta Phi and made lifelong friends. She met her husband, Ted, while working as a juvenile court counselor in Salem after graduation. They were married June 29, 1957.

Ann and Ted moved to Seattle when he graduated from law school in 1958. Ted practiced law and Ann was a police officer with the Seattle Police Department for five years. When they had their first son, David, Ann became a stay at home mother for a while. Her second and third children were also born in Seattle.

Hospice work became her passion as she loved meeting and helping patients and their families at a difficult time in their lives.

Ann was known for her wit, generous spirit, kind heart, "directness," passion for her work, love for her family and friends, and seemingly limitless energy. She had many hobbies and interests – water and snow skiing, knitting, canning, cooking, gardening, and later in life, crossword puzzles, Sudoku, and watching sports.

Ann was a member of Bethany Presbyterian Church and had been an elder at Marine View Presbyterian Church.

Ann was preceded in death by her husband, parents, and brother. She is survived by her sons, whom she adored, David, Portland, Mark (Valery), Portland, and Scott (Sarah), College Station, Texas. Ann has the following beloved grandchildren:

“Anne was a member of Bethany Presbyterian Church and had been an elder at Marine View Presbyterian Church...”

“A memorial service will be held at Bethany Presbyterian Church...”

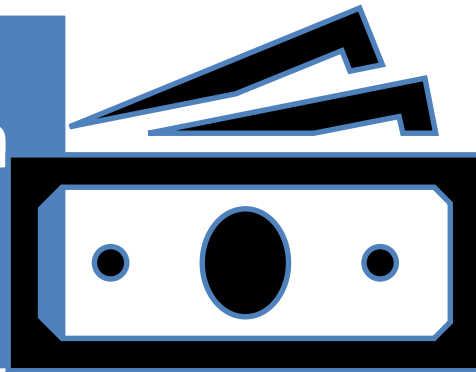
“please make memorial donations to Franciscan Hospice and Palliative Care Fund.”



Experience of Church “Inheritance”



Spent Within
A Week



Sits for
Decades





NOT The charity of choice for planned gifts

- People have had a negative experience of a congregation using (or not using) planned gifts.
- We don't provide clarity over how we will use them.
- Donors aren't confident (or aware) about how they are handled.
- **We don't ask for them.**





NOT The charity of choice for planned gifts

- *Less than 25% of congregations who lose members will receive a planned gift.*
- *Why do your congregational members ask others to give memorials but don't leave a planned gift themselves to the congregation?*





What about the ministry you serve?

- If you got a call today that you received a \$100,000 estate gift...
 - Do you know where it would go?
 - Do you know who would make those decisions?
- If you were personally considering leaving a gift to your congregation...
 - Would you consider making a restriction on the gift?
 - How confident are you be in how it would be used?



Clarity, Confidence, and Commitment

Gift Policy

- What will you do with my gift?
- How do I know you'll use it well?

Endowment Fund

- How long will my gift last?
- When will you spend it?

Legacy Seminars

- How do I take care of my family?
- What do I do with what I've been entrusted?



Clarity: Gift Acceptance Policy

Legacy Gift

Endowment/Reserve

Ministry

Generosity

Reserve
Fund

Outreach
Fund

Debt
Reduction

Youth
Ministry

Community

Ecclesial



When's the Right Time?



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Confidence

- How is it invested/managed?
- Will it be safe?
- Will money be spent?

Think about how you'd decide who to give money to...

- What are their spending patterns?
- Do they share similar values?
- Have they handled something like this before?





“The purpose of an endowment is to grow the church of tomorrow, not embalm the church of today.” – Loren Mead



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Clarity + Confidence = Commitment

Gift Policy/Bylaws:
CLARITY

Endowment
Vision:
PURPOSE

Asset Based &
Planned Gifts:
RESOURCING





Use a Reasonable Plan

- Count donors, not amounts
- Lead gifts
- Matching gifts
- Report results
- Celebrate gifts





Additional Outcomes

- Transparency in how and where you use their gifts.
- Increased awareness of *what can be given!*
- Cash gifts to your endowment
 - Cash
 - IRA Distributions
- See the church as a partner in their estate and final “testament”.
 - Confidence in caring for their family.
 - Joy in supporting what they care about.
- **Planned gifts for the congregation and other charities.**





Important notes

- Develop endowment committees, not investment groups.
- Own your endowment.
- Use your ecclesial resources.





Questions



**Start your plan.
Contact your regional gift planner.**



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