

Interfaith Lessons for Planned Giving Leaders

Stewardship Kaleidoscope

10:45am - 12:00pm

September 26, 2023

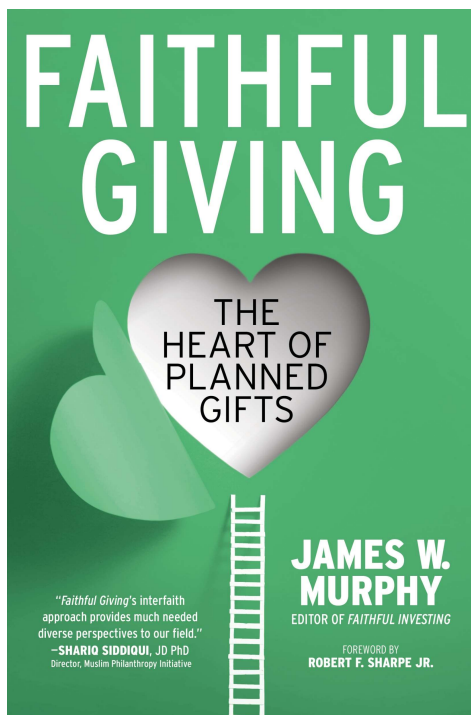
James W. Murphy, CFRE

Email: jimmurphy@ymail.com

Website: www.murphyjw.com

Faithful Giving

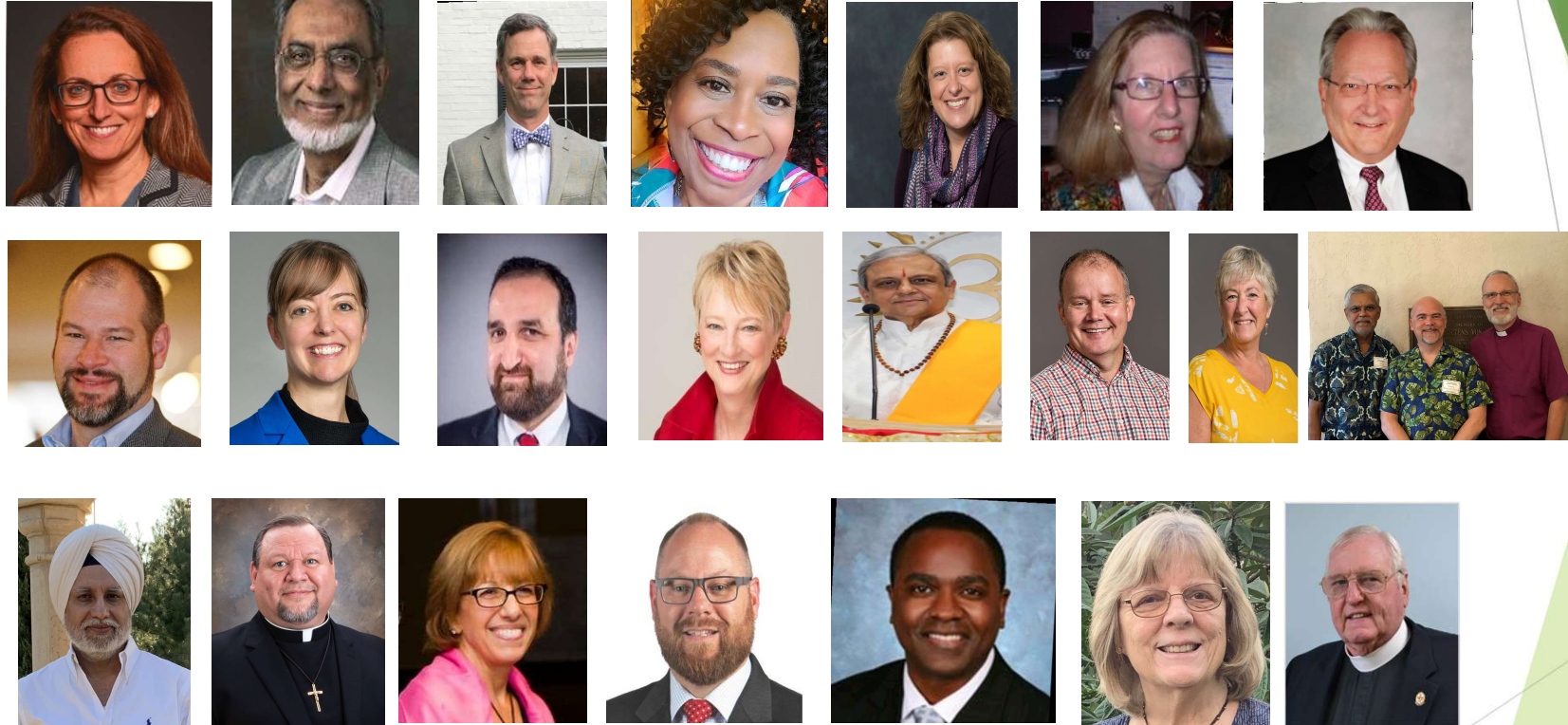
The Heart of Planned Gifts



An Interfaith Endeavor

- Why an interfaith book?
- Why a planned giving book for religious leaders
- What can we learn from each other?

Contributors from Across the Faith World

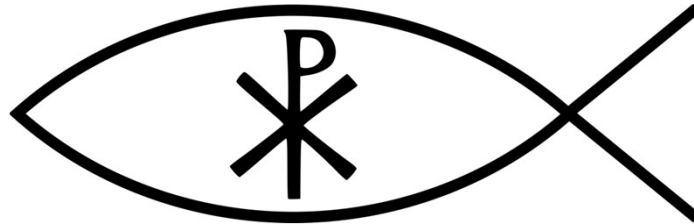
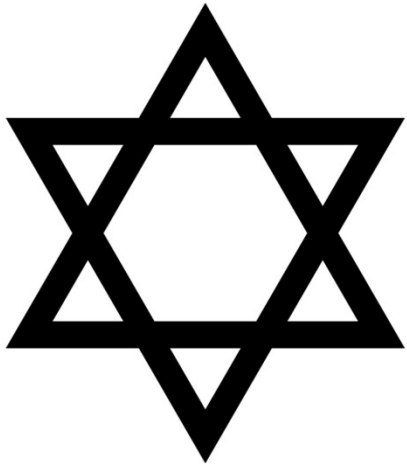


Main Areas of Focus Today...

- ▶ How do various faith traditions encourage Planned Gifts and PG leaders
- ▶ How to maintain leadership support for planned giving programs over time
- ▶ Tools and Techniques for building Trust & Confidence among donors



What is Different between the Various Faiths?



What is Different.....with Planned Giving?

- 'Giving while living'
- Thanking and public recognition
- Access to Planned Giving resources
- Cultural Memories and Current Contexts
 - 'Congregationalizing'



What is the Same?

- Same goals, same challenges
 - Build trust
 - Show appreciation
 - Raise awareness
- ‘Local culture’ will guide & traditions should inspire
- Donors must still be thanked!
- Fewer resources exist for planned giving in most non-Christian traditions and non-Mainline churches



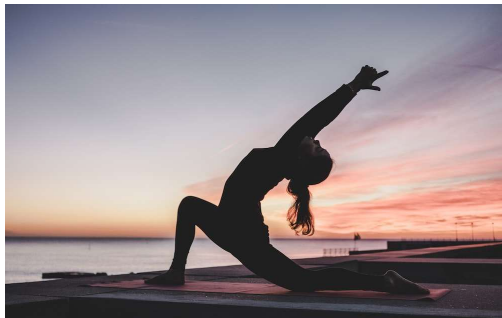
What is Enlightening among Various Traditions?

- Gurdwara Sahib & Sikh Community Center, Yuba City, CA
- Many congregations struggle with moving from annual and special giving to PG
- Focus on what moves the hearts of your community of faith, and you will be able to talk about Legacy Giving too
- Transcultural power of Memorial Funds & *Remembrance*



Current Contexts Impacting All Faiths

- Lessons of Covid remote experiences & End-of-Life planning
- Multiple generations are more confident in using technology for on-line giving & online estate planning
- For many Christian & Jewish congregations, and others assimilating:
 - Membership Decline
 - ‘Spiritual’ but not ‘religious’ growth



Maintaining Leadership & Support

- ▶ Leadership selection
 - ▶ Benefits of unharried volunteers
 - ▶ Selection of 2 leaders for mutual support & continuity
- ▶ Set up and public awareness of Endowment and/or Special Fund policies
 - ▶ Building of Trust over time
 - ▶ Clarity for donors & leaders over time
- ▶ Cultivation over time to maintain relationships
 - ▶ Fitting with cultural context

Maintaining Leadership & Support

- ▶ Coordination with Staff & other Leaders
 - ▶ Administration coordination & data base benefits
 - ▶ Securing on-going support from 'senior' leaders
- ▶ The challenge of the clergy?
 - ▶ Not a problem in all circumstances & traditions
 - ▶ PG efforts as pastoral opportunities
 - ▶ Pastor's common avoidance of resource raising
- ▶ Cultivation of current & past leaders for gifts
 - ▶ Are all 'Board Members' making a PG?

Tools to Help Your PG Efforts

- ▶ What PG resources exist in your denomination or faith tradition?
 - ▶ Check out my site: www.murphyjw.com
- ▶ Outreach & collaboration with other congregations
- ▶ Tools and Techniques for building Trust & Confidence
 - ▶ Asking and Thanking
 - ▶ Documents for building trust & confidence
 - ▶ Memorial funds, Endowments and clarity of use
 - ▶ Events to raise awareness and plan across traditions

Wrap up.....

- Due to the estate and health planning needs of your members, Planned Giving can be a ministry opportunity
- If you don't proceed, secular charities will fill that void!
- By taking action on planned giving, you demonstrate that your congregation has a future!
- Have faith that you can do this!

• Questions???

Follow up

► Thank you all for attending!

Jim's contact info:

Email: jimmurphy@ymail.com

Website: www.murphyjw.com

Faithful Giving: Visit Church Publishing, Amazon, Barnes & Noble, and other websites

Available TODAY!

