**All Saints Planned Giving Proposal**

Presented for discussion to the All Saints Vestry by Andy Eshelman, Todd Miller and Jennifer Sirangelo

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**Goals**

* Establish a long-term planned giving program that invites All Saints members to continue their commitment to building a Kingdom church upon their passing.
* Strengthen the culture of giving at All Saints by expanding giving options for parishioners beyond current annual campaign and special capital projects.
* Contribute to the fulfillment of one of the six goals of our new strategic plan: Stewardship and Giving.

**Proposal for Communications Support** - $35,000

It is our understanding that there is a budget of approximately $35,000 to support planned giving in the 2020 budget. We propose utilizing this budget to hire a local communications firm or a communicatons specialist/writer to assist us as volunteer leaders to fulfill the plan that follows.

**Proposed All Saints Planned Giving Program Development Phases and Timeline**

**Phase One: Start Up**

**March 2020-December 2020**

*Objectives*:

1. Create basic originating documents for a simple planned giving program that can immediately meet the need of responding to interests from parishioners and their families.

* Inspirational description of the Planned Giving Society, its Kingdom purpose and role in the spiritual life of a parishioner.
* Invitation Letter from Father Ed.
* Declaration of Intent Form (simple written mechanism by which a parishioner lets All Saints know their planning giving intentions in advance).
* Listing of Founding Members of the Society (previous planned giving donors and those with signed declarations of intent (if there are any).
* Sample will and bequest language for attorneys and financial planners.
* All Saints stock gift form with instructions for financial planners.
* Develop FAQs.
* Choose sampling of paper brochures from the Episcopal Foundation to have on hand.

1. Build trust and transparency with parishioners that All Saints will use any future planned gifts wisely.

* Refresh gift acceptance and other policies for the Vestry to approve that will form the basis of what future planned gifts will/can do for All Saints.
* General and/or specific endowment funds for buildings, music, programs?
* Use of unrestricted planned gifts and decision making.

1. Create a recognition/stewardship program.

* Research past planned gifts to create list of givers that could be included in a list of founding members of the planned giving society.
* Utilize the unique asset of the Columbarium for stewardship, remembrance and building emotional connections for parishioners to the past and future.
* Consider how to expand upon the special nature of All Saints Day in the life our congregation for recognition/stewardship of planned gifts and those in the Columbarium.

1. Plan for intentional communications.

* Create a “launch year” 2021 communication plan and calendar.
* Bulletin, pulpit, announcement, e-blast.
* Event(s).
* Adult Education.
* Create an evergreen/ongoing communication calendar for 2022 and beyond.
* Annual cycle of bulletin, pulpit, announcements, e-blast.
* Create planned giving page on church website to house planning giving information.
* Create a physical space (brochure rack) in the church building where planned giving information is accessible for parishioners to self-serve year round.
* Event(s).
* Adult Education.

1. Create an annual budget to be approved by the Vestry to sustain the planned giving effort.

* Include a 5-year look ahead budget.
* Work with Vestry to determine what success metrics the planned giving program will be evaluated on to receive sustained annual financial investment.

**Phase Two: Launch**

**January 2021-August 2021**

1. Choose an appropriate date to launch the society in the 1st quarter of 2021.
2. Hire the staff or contractors to support the All Saints planned giving program: communications, stewardship, gift acceptance.
3. Invite parishioners who have already made arrangements in their estate plans for All Saints to let the church know so we can properly recognize them as and thank. Open a window of time to become founding members in advance of All Saints Day.
4. Execute Communication plan.
5. Execute Stewardship plan.
6. Recognize founding members at an event or publicly at the church.

**Phase Three: Growth**

**September 2021-December 2022**

1. Provide proactive education and training for parishioners on planned giving.
2. Expand to regular proactive communication with parishioners who are interested in learning more about planned giving opportunities at the church.
3. Build planned giving staff to include communications, stewardship, gift acceptance, and the addition of a proactive relationship builder who invites planned giving decisions.
4. Execute communication plan.
5. Executive stewardship plan.

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