

K.I.S.S. *Keeping it Simple with Stewardship*

June 11, 2016 + Under One Roof Conference + The Episcopal Church in South Carolina

1. Welcome

1. Stewardship of our Diocese

2. Definition of Stewardship

1. Year-round approach / timelines

2. Continual “marketing,” or linking parishioners’ financial gifts to ministry

(Where is the money going in the collection plate going? What is it used for?)

C. Contribution Statements

1. To mail or to e-mail, that is the question

b. Why just send to those who return a pledge?

D. Christmas/Easter appeal letters & pastoral component

III. Resources (broad) for working with Stewardship

1. *Fearless Church Fundraising* by Charles LaFond

2. TENS (The Episcopal Network for Stewardship) / tens.org

1. Diocese is a member --password

C. Episcopal Church Foundation / episcopalfoundation.org

D. CEEP (The Consortium of Endowed Episcopal Parishes)/endowedparishes.org

E. C. Andrew Doyle: *Church: A Generous Community Amplified for the Future*

(VTS Press, 2015)

IV. Suggested “tools of the trade”

1. Online giving & your church’s web site

Mark Szen of All Saints, Hilton Head, willing to provide your church with a link!

B. Is “Giving” cited on your homepage? How buried is it? Is there basic info like the church’s mailing address and how to make checks payable and who to contact if there are questions? What credit cards does your church accept and is there a link to do so online --how many clicks does it take to get there? Does your church accept gifts of stock and if so, how would a donor go about making this type of gift?

C. Targeted appeal letters

D. Seasonal members

E. Donor Profiles/Testimonials/Articles

E. Emphasis year-end giving: Dec 31 office hours;/IRA distributions for age 70+ if still allowed;

“How to” for gifts of stock

F. Printing list of names for those who pledge

G. Kiosk giving (St. Philip’s, Atlanta) / Using a smartphone “app”

Presenters:

Ray Sabalis, Christ Church, Denmark+Mark Szen, All Saints, Hilton Head+Nancy Ezell Suggs, Grace Cathedral, Chas.

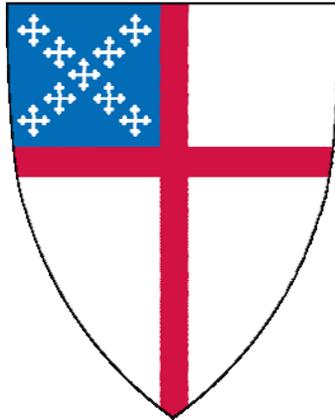
ALLSAINTS 2016

All Saints 2016

April	Inreach Ministry Fair
June 12	Ministry Story #1
July 10	Ministry Story #2
August 7	Ministry Story #3
Sept. 4	Ministry Story #4
Sept. 18	Outreach Ministry Fair – Kickoff Event
October 2	Ministry Story #5
October 9	Banners go up
October 16	Lay Message #1 Send Stewardship Brochure
October 23	Lay Message #2
October 30	Lay Message #3
Sat. November 5	Thank You Party/Celebration
Sun. November 6	Ingathering
November 21	Reminder Letters
December 5	Reminder Calls
December 12	Complete

Planned Giving Basics

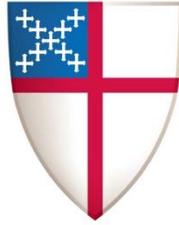
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1. Why Planned Giving is Important
 2. Infrastructure needs to consider before promoting to your parish
 1. Gift Acceptance Policy
 1. Who will make decision on how to use gift if not donor-specified?
 2. Designate a contact person to field questions for attorneys, etc.
 3. Fact sheet on types of Planned Gifts (e.g. wills, annuity, trust)
 1. Resources:
 1. Episcopal Church Foundation/episcopalfoundation.org
 2. TENS (The Episcopal Network for Stewardship) / tens.org
 4. Basic tools of the trade to consider
 1. Cite this type of giving in church publications on a regular basis, *Is God's Will in Yours?*
 1. One-liners can be found on web
 2. Make sure there is a section on your website, citing the church's legal name and providing a contact name.
 - B. Inquire on annual pledge card:
 - I. Have you made a planned gift to <<Church Name>>?
 - ii. Would you like more information on making a planned gift
(and then have a mechanism in-place to follow-up with this individual.)
 - C. Write a "donor profile" or an article for your newsletter, highlighting a parishioner that has made a planned gift to the church and what motivated him/her to do such.
 - D. Create a plaque of names to display prominently
- *Make sure there is a way for a parishioner to opt-out and be listed as Anonymous
- E. Create a "society" that hosts annual events to recognize these special donors

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THE EPISCOPAL CHURCH IN SOUTH CAROLINA
UNDER ONE ROOF JUNE 11, 2016
PLANNED GIVING

The Minister of the Congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families, and of all persons to make wills, while they are in health, arranging for the disposal of their temporal goods, not neglecting, if they are able, to leave bequests for religious and charitable uses.

Book of Common Prayer p. 445

A planned gift is one which is created during a person's lifetime which will benefit an institution after the donor's death. TECSC encourages planned gifts through a variety of vehicles:

- Bequest
Provision in will or trust to give an amount or percentage of estate.
- Life insurance policy
Name as the beneficiary.
- Retirement account (IRA, 401K, 403B)
Name as the beneficiary
- Charitable gift annuity (or deferred gift annuity)
Pays fixed amount each year to donor for life. Then remainder of gift goes to diocese or parish.
- Pooled income fund
Investment returns are paid for life. Then initial gift amount goes to diocese or parish.
- Charitable remainder trust
Trust which donor receives annual payments for life or term of years. Then remainder goes to diocese or parish.
- Charitable lead trust
Annual payment to diocese or parish for period of years then remaining assets go to designated beneficiary.

TECSC invites prospective donors to consider gift vehicles offered by The Episcopal Church Foundation (specifically charitable gift annuities, pooled income fund and charitable remainder trusts).

Things to consider before beginning a planned giving program:

Determine the outcome: increase endowment, fund the maintenance of property, provide scholarships for participation in mission.

Determine whether funds will be used in annual operating budget or put into an endowment to use only the interest.

Develop a gift acceptance policy. Include what types of gift to accept, whether or not it may be a restricted gift.

Determine who to call for information: planned giving committee or staff of parish, stewardship and development committee of diocese, or staff of Episcopal Church Foundation.

Determine which stories do you want to tell and where do you want to tell them. Consider letters, brochures, pledge cards, website, notes at bottom of quarterly statement, posters.

Develop materials which support your planned giving program. All planned giving materials will be provided free of charge. For any planned gift related documents, materials, illustrations, letters or other correspondence, the following disclaimer should be included: *The Episcopal Church in South Carolina (or Parish) strongly urges you to consult with your attorney, financial and/or tax advisor. This information in no way constitutes legal or financial advice.*

Determine ways and times to acknowledge donors. Consider donors who wish to remain anonymous. Some ways to recognize donors are letters, visits, dinners or society.

**Expectations of donors to
The Episcopal Church in South Carolina**

1. Documentation will be required for all official crediting of gifts.
2. All donors will be properly thanked for a gift and sent a formal acknowledgement of their gift for their records and tax purposes. Included in this acknowledgement will be a statement that no goods or services were exchanged for this gift and a 501 c 3 designation.
3. Donors will be advised of the impact of their gifts on The Episcopal Church in South Carolina projects and mission.
4. Donors will be urged to have all deferred gift agreements reviewed by their own legal and financial advisors prior to their gifting.
5. Donors will be advised that obtaining a qualified appraisal to establish the fair market value of gifted assets will be the responsibility of the donor, not of The Episcopal Church in South Carolina.
6. All requests for anonymity will be carefully guarded, unless federal and state law or other legal authority requires disclosure.
7. Donors will be acknowledged in a diocesan publication.

Gift Acceptance and Crediting Policies

An Overview

The Episcopal Church in South Carolina, with oversight of the Diocesan Development Committee has established a set of Gift Acceptance and Crediting Policies for donors and solicitors as a guide for discussion, solicitation, acknowledgment and crediting of gifts to TECSC.

The intent of the Gift Acceptance and Crediting Policies is to provide fair and equitable standards for all involved in the philanthropic support of TECSC. The policies are intended to be straightforward and honest; fulfill all legal requirements; be fair and sensitive to donors; and further the mission and plans of TECSC.

In the case of special circumstances or major exceptions, the issue may be presented to the Gifts Acceptance Committee (comprised of the Chair of the Development Committee, and the 2 Development Committee Trustees) for a final decision/clarification. TECSC may accept specific gift arrangements other than those detailed below on the recommendation of the Gifts Acceptance Committee, but the overarching policy of TECSC is to convert donated assets to cash as quickly as is practical with consideration given to a donor's request.

Gift Restrictions

Donors may direct their contributions for specific purposes that meet the needs and requirements of TECSC. The donor should discuss the ideas for the restricted gift with the Gift Acceptance Committee and have approval of the Diocesan Development Committee before a restricted gift may be accepted. The language used in creating such a gift should leave sufficient leeway to apply the gift to some other purpose should the designated purpose cease to exist or no longer be feasible. Whenever possible and feasible, an unrestricted gift will be sought by TECSC.

Right of Refusal

TECSC reserves the right to refuse any gift that does not further the mission of the diocese or that would create an administrative burden or cause the diocese to incur excessive expenses.

Confidentiality

All information obtained from or about donors/prospects shall be held in the strictest confidence by The Episcopal Church in South Carolina staff and volunteers. Neither the name, the amount, nor the conditions of any gift shall be published without the express written or oral approval of the donor.

Gift Documentation

Documentation will be required for all official crediting of gifts.

1. Letters of intent, instruments of transfer, email confirmations, and pledge forms will be used when appropriate to identify the gift arrangement and asset being given, its intended use, pledge payment schedules (where applicable) and the donor. Such forms can be highly personalized to accommodate particular gift arrangements and can be used to reassure the donor that his or her special goals and circumstances will be observed.
2. All gift instruments referenced above must be in writing and dated. Verbal pledges of support will be counted in a separate “verbal” category until such time as they are confirmed in writing.

Gift Administration

1. All documented gifts and pledges will be recorded by the designated member of the Diocesan staff, who also will ensure that the appropriate receipting and written acknowledgments are mailed to donors in accordance with standard office practice. All pledge payment schedules will be in writing for confirmation of a donor’s intent.
2. Pledge reminder letters, based upon the donor’s confirmed payment schedule, will be sent by TECSC unless notified of circumstances making pledge reminders inappropriate.
3. Gifts will be directed to the purposes designated by donors as long as they are legal and acceptable to TECSC.

Gift Types

Outright Gifts

1. Cash and checks are counted as of the date received by TECSC. An exception is made at the end of the calendar year when the postmark date is used.
2. Securities that are publicly traded are counted at the mean market value on the date of gift (i.e. - the date the stock is received into the TECSC account). Gifts of closely held stock deemed to be marketable may be credited at the fair market value as determined by a qualified independent broker.
3. Real or personal property gifts are reviewed by the Gifts Acceptance Committee. The value for crediting those accepted is determined by current appraisal of fair market value according to guidelines of the Internal Revenue Service. Any restrictions on sale, maintenance, administration or display must also be approved. These gifts will be credited on the date the donor relinquishes control of the asset to TECSC by deed or by physical delivery, as may be appropriate to the form of the gift.
4. Gifts-in-kind that help meet approved TECSC needs may be tax deductible. It is the donor’s responsibility to consult with a tax professional as to deductibility and/or tax ramifications

5. Gifts of personal and/or real property will be accepted only if the personal and/or real property is given with the intent and understanding that it may be sold and the proceeds used for TECSC plans and mission.

Personal Gifts

A personal gift is defined as a gift from an individual or individual's family or a gift commitment made through the vehicle of the individual's personal or family foundation, or through a business entity controlled by the individual or family. For example:

- Gifts given in honor or recognition of an individual are not credited to that individual.
- Corporate or Foundation gifts over which the individual has a controlling interest and allocation discretion are credited to that individual.
- Corporate matching gifts will be counted in accordance with binding corporate policy. If there is no such policy, gifts will be counted toward the purpose of the gift which triggered the match.
- Matching gifts and gifts from donor advised funds will trigger recognition credit for the individuals who steered them to the campaign. For tax purposes, such gifts will be treated as gifts made by the legal entity.

Deferred Gifts

The Episcopal Church in South Carolina encourages deferred gifts through any of a variety of vehicles:

- Charitable gift annuity (or deferred gift annuity)
- Pooled income fund
- Charitable remainder trust
- Charitable lead trust
- Bequest
- Life insurance policy

The Episcopal Church in South Carolina may invite prospective donors to consider gift vehicles offered by The Episcopal Church Foundation (specifically charitable gift annuities, pooled income fund and charitable remainder trusts).

When donors are provided planned gift illustrations or form documents, these will be provided free of charge. For any planned gift related documents, materials, illustrations, letters or other correspondence, the following disclaimer should be included:

The Episcopal Church in South Carolina strongly urges you to consult with your attorney, financial and/or tax advisor. This information in no way constitutes legal or financial advice.