

*The*  
Episcopal Diocese of Newark

*Equipping congregations... Empowering people... Engaging the world ...with the hope and justice of Jesus.*



# Planned Giving Workshop

June 4, 2013

**Episcopal Diocese of Newark  
Planned Giving Workshop  
June 4, 2013**

**Agenda**

**6:30 – 6:40 Welcome/Prayer/Introductions**

**Definition of Planned Giving**

**6:40 – 6:55 Bible Study** (Luke 12:13-21 - The Parable of the Rich Fool)

**6:55 – 7:15 Planned Giving Program Basics – ASK , THANK, TELL**

**7:15 – 7:35 Structure & Policies**

Two Essential Questions

Policies & Resolutions

**7:35 – 7:50 Marketing Plans**

Planned Giving Education

Planned Giving Program Basics

*Ask, Thank, Tell*, by Charles Lane

Diocese of Newark Legacy Fellowship

**7:50 – 8:00 Questions/Comments**

**Resources**

Episcopal Church Foundation: *Funding Future Ministry*; Brochures;  
Booklets; Life-Income Gift Management; Webinars; Expert  
Consultants ([www.episcopalfoundation.org](http://www.episcopalfoundation.org))

Diocese of Newark

# Episcopal Diocese of Newark

## Bible Study

**Luke 12:13-21**

### The Parable of the Rich Fool

Someone in the crowd said to him, "Teacher, tell my brother to divide the family inheritance with me." But he said to him, "Friend, who set me to be a judge or arbitrator over you?" And he said to them, "Take care! Be on your guard against all kinds of greed; for one's life does not consist in the abundance of possessions."

Then he told them a parable: "The land of a rich man produced abundantly. And he thought to himself, 'What should I do, for I have no place to store my crops?' Then he said, 'I will do this: I will pull down my barns and build larger ones, and there I will store all my grain and my goods. And I will say to my soul, Soul, you have ample goods laid up for many years; relax, eat, drink, be merry.' But God said to him, 'You fool! This very night your life is being demanded of you. And the things you have prepared, whose will they be?' So it is with those who store up treasures for themselves but are not rich towards God.'

Questions for Reflection and Discussion:

TO BE  
ADDED

**Episcopal Diocese of Newark**  
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**“Planned Giving Rubric”**

*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.*

Page 445

The Book of Common Prayer

A Thanksgiving for the Birth or Adoption of a Child

**Planned Giving Program Basics – ASK, THANK, TELL**

Invite participation (**ASK**)

“Have you remembered your congregation in your estate plan?”

“Would you like information on how to remember your congregation in your estate plan?”

**THANK** people for their response; for those who have included the church in their estate plan, provide an information/“enrollment” sheet with public acknowledgement permission or not...respondent gets to choose which.

Acknowledge members who have expressed their intention (with permission) via Legacy Society (**TELL**)

In Print

During worship services (commission/acknowledge/celebrate/thank)

During a special event...dinner, etc.

Publicize/Celebrate/Thank receipt of estate gifts; include use of gift proceeds (**TELL**)

**DO THESE THINGS CONTINUALLY;** part of a cycle...not just once and done!!!

## **Policies & Resolutions**

- Basic Structure: Committee Duties/Terms, etc.
- Gift Acceptance Policy
- Policy Regarding Disposition of Gifts
- Policy Regarding Designated Funds
- Spending Policy
- Investment Guidelines

## **Language for Including Your Congregation in Your Estate Plan**

*I give Dollars (\$XXXXXX) to the RECTOR, WARDENS AND VESTRY OF ST. SWITHINS, Somewhere, New Jersey, to be used [complete as parishioner wants. Some examples: "as the Vestry directs" or "to be added to the Endowment" or "to support Christian Education"].*

## **Episcopal Diocese of Newark Planned Giving Workshop**

### **Planned Giving As A Part Of Ongoing Stewardship**

- Stewardship: “All that we do with all that we have all of the time”
- Helping congregations begin or maintain a program to encourage estate gifts

#### Resources:

The Episcopal Church Foundation  
815 Second Avenue  
New York, NY 10017

James W. N. Murphy, Managing Program Director, Financial Services  
Meg King, Assistant Program Director  
800.697.2858

[www.episcopalfoundation.org](http://www.episcopalfoundation.org)

click on “Resource Library” (upper right link on homepage)  
scroll down to “Planned Giving Brochures & Booklets”  
or  
scroll down to “Planned Giving Directory of Services”  
or  
scroll down to “Funding Future Ministry”

#### Diocese of Newark

David C. Farrand  
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Summit, NJ 07901  
908.273.8225  
[dcfarrand@aol.com](mailto:dcfarrand@aol.com)

Year-Round Stewardship:  
Planned Giving Resources  
May 16, 2013



# The Episcopal Diocese of Newark

31 Mulberry Street, Newark, NJ 07102 • 973-430-9900 • [www.dioceseofnewark.org](http://www.dioceseofnewark.org)

*Equipping congregations... Empowering people... Engaging the world... with the hope and justice of Jesus.*

Office of Finance

## IMPORTANT INFORMATION AND UPCOMING EVENTS JUNE 2013

### IMPORTANT INFORMATION

#### **Parochial Reports**

Due date was March 1, 2013.

#### **Audits**

Due date for audits for the year 2012 are due September 1, 2013.

Churches are to use guidelines and Audit Checklist found at

<http://www.dioceseofnewark.org/audits>

#### **GreenFaith Energy Services Program:**

##### ***A Partnership of the Diocese of Newark and GreenFaith***

The purpose of this partnership is to provide congregations with practical ways to be more energy efficient, to learn about energy management, and to reduce energy costs.

The initial phase will be limited to the first 20 congregations to sign up.

Look for announcements of webinars in May and June, and sign-up in July.

### UPCOMING EVENTS

#### ***The Episcopal Network for Stewardship (TENS) Conference***

Flourish in Faith Conference will be held in Salt Lake City, July 12-13, 2013.

Those who do not attend the conference can participate in opening worship, keynote addresses and four designated workshops via webcast. Webcast registration price at \$75.00.

More information at [www.tens.org](http://www.tens.org)

#### ***Tax Implications of Clergy Compensation***

For clergy and treasurers

Will be held in late September 2013

Details will be announced shortly.

## **STEWARDSHIP RESOURCES AND OTHER INFORMATION**

### ***The Episcopal Network for Stewardship (TENS)***

The Diocese is a member of TENS and, as a result, all congregations are able to access the vast amount of stewardship resources that are offered by TENS. Simply go to [www.tens.org](http://www.tens.org) and enter the username *generous* and the password *giving*

### ***The Episcopal Church Foundation***

ECF provides a wealth of information regarding stewardship, all of which is free and available to you. Their website is <http://www.episcopal.foundation.org/> . There are a number of webinars that ECF offers, most at no charge.

In addition, ECF provides information that is valuable for leaders of congregations, including *Vital Practices* and other offerings.

### ***The Diocese of Newark***

Go to <http://www.dioceseofnewark.org/stewardship> for additional information and resources.



Christopher, J. Clif     **Not Your Parent's Offering Plate: A New Vision for Financial Stewardship**, Abingdon Press, Nashville, TN, 2008. ISBN-13: 978-0-687-64853-5  
*REQUIRED READING. Along with Ask, Thank, Tell, this book ought to be required reading for all vestries, Bishop's committees and Finance committees—it is certainly **required reading** for ALL CLERGY IN CHARGE of a congregation. Not to be missed, or dismissed lightly.*

Christopher, J. Clif     **Whose Offering Plate Is It: New Strategies for Financial Stewardship**, Abingdon Press, Nashville, TN, 2008. ISBN-13: 978-1-4267-1013-1; *REQUIRED READING*  
Last year, Dr. Christopher released this second book that answers many questions from real pastors and ministers who read the first book or saw Rev. Christopher at one of his seminars: "Exactly how do I go about gaining access to the donor records when my church has prohibited it for a hundred years?" "How do I explain a meeting with just those who are strong givers without alienating those who are not?" "How can we advocate online giving without encouraging some to abuse their credit cards?" "What should letters to different giving constituencies look like?" These among many other questions are addressed in this excellent sequel. *Required reading for ALL CLERGY, as above.*

Durall, Michael         **Creating Congregations of Generous Givers**, Alban Institute, 2000. On Sale: 20% off: only \$11.20 from Cokesbury.com: "Asking parishioners for money is very different from creating congregations of generous people. In this provocative book, stewardship consultant Michael Durall argues convincingly that annual pledge drives inadvertently perpetuate low-level and same-level giving in congregations. Written with the voice of experience, **this book will help clergy and lay leaders initiate and sustain effective stewardship programs.** Durall believes that asking for money eventually becomes routine, even tedious—but creating a congregation of generous people becomes ever more meaningful with passing time." 2001 Alban Book of the Year. *Required Reading for Clergy, Vestries & Bishop's Committees, et al.*

\_\_\_\_\_, **Beyond the Collection Plate: Overcoming Obstacles to Faithful Giving**, Abingdon Press, ISBN-13: 9780687023158; ppbk, \$18, from Cokesbury.com: "Written for pastors, finance committees, and everyone involved in the financial life of congregations, *Beyond the Collection Plate* will serve as an indispensable guide to how the priorities of God's kingdom can determine how money in the church is raised, managed, and spent. This book is intended to help readers strengthen the bond between parishioners' daily lives and their charitable giving. It analyzes attitudes in church toward giving and managing money, demonstrates how many prevailing practices in stewardship campaigns and fundraising have lost their effectiveness, and provides strategies for encouraging more sacrificial giving." *AN EXCELLENT PAIR OF BOOKS BY DURALL!*

Grimm, Eugene, and Miller, Herb     **Generous People: How to Encourage Vital Stewardship** (Effective Church Series) Abingdon Press, Nashville, TN, 1992. ISBN-10: 0687140455 ISBN-13: 978-0687140459 *Recommended.*

Jamieson, Janet T. & Philip D.       **Ministry and Money: A Practical Guide for Pastors**, Westminster John Knox Press, Louisville, KY, 2009. ISBN 978-0-664-23198-9. This book is EXACTLY what its title says it is, and so much more. *For any member of the clergy who has been intimidated by money, financial reports and the budgeting process.* But that's not the best part—it's the Theology of Money section that makes this book invaluable. Dare I say it's required? *Strongly Recommended.* Save 35% online at [www.Cokesbury.com](http://www.Cokesbury.com) right now!

Lane, Charles R.       **Ask, Thank, Tell: Improving Stewardship Ministry in your Congregation**, Augsburg Fortress Publishers, Minneapolis, MN, 2006. ISBN-10: 0806652632; ISBN-13: 978-0806652634 *REQUIRED READING. A virtual paint by the numbers book on how we must begin to see Stewardship as a discipleship matter, and how to best ask, thank, and tell our people about what we do as a church and how people's gifts of money to our congregations help transform lives.*

Robertson, C.K.      **Transforming Stewardship**, Church Publishing, New York, NY, 2009.  
*Practical, hands on guide to doing effective stewardship in congregations, and a good supplement to the philosophy offered in Lane and Christopher above. Filled with anecdotes and ideas that inspire, the tools offered in the last half of the book are worth the price alone!*

#### **CHRISTIAN FORMATION STUDY RESOURCES** for use in an Adult Ed. class

Macomber, Debbie      **One Simple Act: Discovering the Power of Generosity**, Pocket Books, ISBN-13: 9781439175576, ppbk; Cokesbury.com, 20% discount: \$6.39 **STRONGLY RECOMMENDED FOR ADULT STUDY GROUPS.** "In a world that often seems stingy and grudging, Debbie Macomber has seen that living in a spirit of kindness and charity can yield unforeseen miracles. In *One Simple Act*, Macomber shows how lives are changed in unimaginable and wonderful ways by "random acts of kindness," providing real stories to help readers discover what happens when we commit simple acts of generosity. Written with Macomber's award-winning skill and sensitivity, *One Simple Act* is a call to action, inviting readers to live with open hands to change lives—including our own—in ways never imagined." –debbiemacomber.com

Powell, Mark Allan      **Giving To God: The Bible's Good News about Living a Generous Life**, Wm. B. Eerdmans Publishing, Grand Rapids, MI, 2006. ISBN 978-0-8028-2926-9 *Excellent scriptural grounding throughout, that all belongs to God, the honor of being a "steward," and much, much more. A perfect book for Sunday school, Advent or Lenten series.*

Twist, Lynne      **The Soul of Money**, W.W. Norton & Company, New York, NY, 2006. ISBN-13: 978-0393329506 *Written by an experienced fundraiser, The Soul Of Money explores our relationship with money and how that affects our culture, lives and spirit. Though not expressly religious, this would be an excellent book for an Adult Christian formation, supplemented with scriptural texts to illustrate her points. You'll look at your own money differently when you've finished this great book.*

#### **ONLINE SPIRITUAL GIFTS INVENTORY**

Here are two web based spiritual gifts inventory that prints out your results on your computer's default printer:

<https://www.do-my-profile.com/actions/showquiz.php?password=divinity&companyid=9404>

<http://archive.elca.org/evangelizingchurch/assessments/spiritgifts.html>

I think the first link is better, more exhaustive, and the output more useful.

#### **STEWARDSHIP PROGRAMS**

These programs are "out of the box" type operations that require significant preparation for optimum results—don't wait until the last minute! Get now and allow yourself all the time needed for maximum effectiveness. (These are presented in no particular order or preference. Research each one for appropriateness for your specific congregation's needs.)

#### **Enough:**

Discovering Joy Through Simplicity and Generosity      **\$29.99** for DVD; **\$9.44** for Leader's Guide  
<http://www.cokesbury.com/forms/search.aspx?ddlSearchScope=&txtSearchQuery=enough%20by%20adam%20hamilton>

Church leaders are struggling to help their congregations respond to the violent ebb and flow of the economy. While their members are simply trying to stay afloat financially, the budget of their church is suffering as well. In the midst of all of this, though, there is God and a divine calling for each of us.

With *Enough* Stewardship Program Guide, Adam Hamilton offers a simple campaign that will transform how the church and individuals view the role of money in connection with their life's purpose and the positive impact that transformation will have on the world.

**Extravagant Generosity: The Heart Of Giving** Planning Kit **\$55.19** (20% discount)  
<http://www.cokesbury.com/forms/ProductDetail.aspx?pid=940973>

Stewardship programs rise or fall on their ability to do two things: first, provide church leaders easy-to-grasp yet comprehensive help in planning and implementing the program; and second, connect stewardship to the spiritual lives of all the members. Created by Michael Reeves and Jennifer Tyler, *Extravagant Generosity* is built on Bishop Robert Schnase's groundbreaking book *Five Practices of Fruitful Congregations*.

Program includes: An overview timeline, providing quick information on what happens during each week of the stewardship campaign; a guidebook for leaders that covers all aspects of the campaign, from detailed plans for each of the four Sunday services to marketing materials like flyers and postcards to e-mail messages and letters designed to be sent to specific groups within the congregation—all available on the enclosed CD-ROM; a small-group leader's guide to host Sunday school and other small groups during the program; a DVD with video segments for four group-study sessions and short clips for use in worship.

**Grow One Sunday** Stewardship program on-line **\$10.50 + \$9.25 per 100 Commitment cards**  
<http://www.cokesbury.com/forms/ProductDetail.aspx?pid=439779>

Experiences in congregations of many denominations across the United States indicate that **Grow-One Sunday is especially valuable in six kinds of churches:** 1.) Small congregations 2.) Churches that have never conducted an annual stewardship program 3.) Churches whose unpleasant experience with an ineffective stewardship model in past years prejudiced them against conducting any kind of financial stewardship program 4.) Large churches that find the traditional "celebration luncheon" in the popular **New Consecration Sunday Stewardship Program** logistically impossible, due to lack of space 5.) Churches that want to change from a stewardship program they have used for several years but seems to have lost its appeal 6.) Churches that want their financial stewardship education to focus on spiritual growth rather than on fund-raising.

**Grow-One Sunday** is a spiritual-growth program as well as a financial campaign. It is based on the biblical theology of "the need of the giver to give" for his or her own spiritual development, not on the "need of the church to receive" in order to balance its budget. Permission is granted to photocopy the complete program (not excerpts) for use in congregations.

**Committed to Christ: Six Steps to a Generous Life** by Bob Crossman, Abingdon Press, \$80.00, UPC: 843504028886, from Cokesbury.com. "A six-week stewardship program that presents giving as a lifelong journey in Christian discipleship. After an introductory Sunday stressing the importance of commitment to Christ, the next six weeks are spent exploring six steps to a generous life: Prayer, Bible Reading, Worship, Witness, Financial Giving, and Service. With each step, through worship, sermons, and small group activities, the congregation is asked to assess prayerfully their own level of commitment and to consider increasing that commitment by one step. Equal emphasis is placed on each of the six steps, clearly communicating that *this program is not simply about money, but rather cultivating a thankful heart that will lead us to giving more than we can ever imagine.*" Perfect for a Lenten program—the small investment to do this right will make a lasting, life-changing impact on your congregation. **HIGHLY RECOMMENDED!**

**Transformed Giving** Stewardship program **\$81.99 + \$11.00 per 100 Commitment cards**  
<http://www.cokesbury.com/forms/search.aspx?ddlSearchScope=&txtSearchQuery=transformed%20giving>

You can give your members the refreshing benefits of a 40-day spiritual development program... far more attractive to them than a standard contribution series. Your congregation will see that financial solicitation is not the primary focus of this 40-day study. However...**enhanced giving from the heart will flow out as one result of this faith-building experience.**

Once a week, your adult classes or small groups can all experience identical lessons, which build on the shared themes found in your private daily readings during the past 7 days. The questions provided in your *Treasures of the Transformed Life* Participant's Workbook can also serve as discussion starters for your group. Group commitment to the same private daily readings of

*Treasures of the Transformed Life* over a 40-day period can provide your Sunday School class, small group, or entire congregation with a unifying experience.

Your church can enjoy all the benefits of greater unity. Through synchronized private readings, group study, and coordinated worship messages...your entire congregation can be immersed together as a single body in the same fulfilling step-by-step transformation. This shared experience can lead them in unity to improved stewardship.

***With God's Permission* (FREE from ELCA)**

<http://archive.elca.org/stewardship/withgodspmission/>

"With God's Permission," is a program of financial response based on ***an asset-based approach*** to congregational dynamics. This simple program can help your congregation fund God's mission in a fresh and exciting manner, providing enjoyment and energy to the task of asking for and receiving commitments for financial support from your congregation members.

"With God's Permission" is a worship-based financial response method – i.e., members' financial commitments collected during a worship service – and also includes members in several preparatory "mini-events" during the three Sundays preceding a final Sunday worship service.

This program lasts a total of eight weeks, including three single-Sunday 90-minute after-worship "mini-events," a Sunday "Celebration of God's Permission", and one week each of preparation and follow-up.

***Make it Simple: A Resource for Stewardship Education and Annual Response* (FREE from ELCA)**

<http://www.elca.org/Growing-In-Faith/Discipleship/Stewardship/Make-it-Simple.aspx>

*Make It Simple* is a congregational stewardship resource to assist you in stewardship education--about simplicity and generosity--and in conducting a response method by which you collect congregation members' commitments to support financially God's mission in your midst. May God's Spirit embolden you in your stewardship and your service. ***Great resources, including video!***

**Personal Financial Management programs**

It behooves us to help people sort out the financial mess their lives might be in. The first two programs will do that, while the other will challenge the routine way we think about our money.

***Three Simple Rules***, by Theo A. Boers, [www.threerules.org](http://www.threerules.org)

This book is written from a Christian perspective, but first and foremost it is based on sound personal financial management principles. The Addendum includes two pages referencing scriptures dealing with work, honesty, giving, saving, taxes, and contentment. It offers a step-by-step process of realistically setting goals and addressing needed changes to spending, debt, assets, and income. The easily understood language and examples will help the reader confidently walk through the pages to improve their financial life. A Leader's Guide is available, with accompanying PowerPoint presentation, to make this an easy to prepare and deliver financial course for your people.

***Money Matters: Financial Freedom For All God's Churches***, by Mike Slaughter

Imagine feeling free from financial worry, free from debt, and free from the never-ending pressures of juggling all those financial demands. Imagine...feeling in control of your finances. ***MONEY MATTERS: financial freedom for all God's children*** (leader's Guide w/ DVD) shows you how to do God's math, on spiritual principles found in Scripture: Debt-Free Living, A Disciplined Lifestyle, Surrender & Trust, Stewardship vs. Ownership, Focus & Planning, Easy Simplicity, Creating vs. Consuming, Generosity. Each participant will household will need a copy of the ***MONEY MATTERS*** book.

***Share. Save. Spend.*** by Nathan Dungan

Their new product is: Financial Sanity. The *Financial Sanity* DVD and Leader's Guide provides a simple but complete script to help you lead a group through all four one-hour sessions of the Financial Sanity seminar. You don't need to be a financial advisor or a professional speaker to effectively facilitate this seminar. Best of all – it requires minimal preparation to get started. See it all at: [www.sharesavespend.org](http://www.sharesavespend.org)