

Planned Giving Success: Lessons from the "Front Lines"

By Mike Buwalda

I recently asked several ministries to share their best experience with Planned Giving. Check out this revealing summary of lessons learned from the "front lines" of ministry development:

<**Host a creative event.** A missions organization had a goal to identify estate-planning prospects and raise money for current needs. They booked a local dinner theater for a Monday afternoon show and offered a series of travel adventure films to our major donors. The target audience was donors who had given over \$5000, are over 65, and love to travel. Films about China, Canada, and Norway were among those offered and they were narrated live by the film producer. They charged \$240 per couple for the 4-film series (meal included) and limited reserved seats to no more than 350 people. They sold out the theater 6 months in advance! The printed program presented information on each film with tips including "How to make a will that works" and charitable gift annuities. Planned giving materials were made available in the lobby and an estate planner spoke for 3 minutes during intermission about how to save money on your taxes while helping your favorite charity. He would then draw winners for door prizes that had been donated (free getaway/second honeymoons). The responses were 100% positive. The audience chose places they wanted to "visit" next year (films), they estimated a 30% response rate on planned gift interest! As a bonus, they also had net income of about \$20,000 after expenses, and are looking forward to doing it again.

<**Educate supporters about biblical stewardship.** A denominational foundation told of the most exciting year in its 65-year history. They began to focus more on becoming an educational resource for their churches, focusing on the fact that they are not owners of anything and that everything we have belongs to God. After a long process of due diligence, they settled on a third party to assist them in conducting biblically-based educational seminars on what the Bible teaches about managing God's assets and the biblical basis of properly planning our estates. In doing so, they are beginning to see God's people completing estate plans based on being stewards rather than owners. They are not promoting growing the Foundation's assets. Instead, their focus in this effort is to help God's people leave asset gifts to fund ministry. This organization quoted a seminary president saying, "In 20 years there will be two kinds of seminaries - those that have endowments and those that used to be in existence." They went to explain they believe this will be true of churches too. If we are not asking our members to give of their assets to create a legacy gift to God's work, they contend, someone else will.

<**Increase the visibility in your communications.** A seminary ministry reported receiving approximately \$700,000 in bequests, significantly above their \$400,000 annual average. They promoted wills and trusts every January and planned and estate gifts in both March and September. They also include planned gift ads in their newsletter, which they've found typically has a longer shelf-life than regular mail. Next year, they plan to encourage estate and gift planning in more newsletters and as well as the president's letters.

<**It's a long-term commitment.** A Christian community foundation had a record year with estate gifts. Most of the plans had been in place for many years, and only recently had the estate "matured." The primary reason that estate gifts were up was that effective planning started years ago. This particular group has been involved in estate planning for about 24 years.

<**Take advantage of outside help.** A discipleship ministry was pleased with their response, and credits an outside service that helps them with their Planned Giving strategy, which. Their approach has included marketing to the constituents in their database as well as offering a seminar during their annual donor weekend of thanks. As budget allows, they want to do more with planned giving.

<**See Planned Giving as an ongoing ministry to your financial partners.** An evangelistic ministry reported a great year of planned gifts of stocks, bonds, closely-held stocks, and real estate. They also had a good year of matured estate gifts from estate designs set up over the past years. They continue to push forward with their efforts to assist their financial partners through gift planning and estate

design services. A trusted advisor gave them the training and support to build the program they now have.

<**Volunteers are excellent Planned Gift prospects.** A rescue mission reported receiving their largest single estate gift ever—\$204,000. It came from a widow who had volunteered once a month at the Mission for years, walking from her home a few blocks away. She had given a \$100 gift once or twice a year. The mission had no idea she had remembered them in her will - in fact, she hadn't planned to until a television evangelist she and her husband had admired was caught in a sinful situation. She had no heirs, and asked friends who were the executors of her will for advice. She was considering another nationally known Christian evangelist. Her friends suggested she think of her own church and a local charity like the mission where she volunteered for years. She had never considered us prior to that, in spite of the planned giving articles in the newsletters she helped to stuff, and the planned giving brochures used as receipt stuffers in the receipts she received from the mission. She decided to split her estate between her church and the mission, and the result for the ministry was extraordinary.

<**Ask annual fund donors if you are in their Will.** A Christian school saw more estate planning activity than in the past 5 or 6 years. Several estate gifts came in as well. For them, it was setting regularly scheduled times when their estate planner would be in the area and advertising by word of mouth and in publications, church bulletins, etc. They also accomplished a lot by just asking all of their major donors during their annual fund drive, "Do you have an estate plan and if so have you named us in it?" They found out quite quickly that people are willing to answer this question, and they also found out who needed a visit by their estate planner.

<**Continuous marketing builds momentum.** A bible distribution ministry had a good experience with estate gifts, sharing that their projected targets were met and they were blessed by the many individuals who have remembered them in their wills. As with any charity, they explained, the challenge is to continue developing marketing strategies to keep up the momentum of estate gifts in the future.

<**Development staff need a biblically transformed view of estate gifts.** A relief organization says their experience with estate gifts was and always is good, listing four reasons why. First and foremost, estate gifts are the paradigmatic example of James 1:17; they are the ultimate (good) planned gift from the Father above. His are the keys to life and death. By His sovereignty, He is fulfilling His purposes through the legacy of the deceased and His ongoing work through the ministry. Every estate gift evokes praise of the Creator, Sustainer, and Finisher of our life, which makes our experience very good! Second, estate gifts are poignant reminders that donors often view ministries as family. A bequest affirms that the donor held the relationship with us in a most cherished position ("where your treasure is..."). What a humbling contemplation! It reminds us to treasure our donors not as human ATMs, but as family with whom we are eternally united by love's strong cord. Third, since estate gift totals may go up or down from year to year, the fluctuation helps teach us the secret of being content in plenty or want: "I can do everything through him who gives me strength" (Phil. 4:13). "Lord, you have assigned me my portion and my cup; you have made my lot secure. The boundary lines have fallen for me in pleasant places; surely I have a delightful inheritance" (Ps. 16:5,6). Fourth, estate gifts always remind us that "our" ministry is not a thing to be owned by us. It is God's, and if we are walking worthy of His calling, we will not lack His supply. No one but God can claim credit for the delivery of an estate gift. He alone controls the timing. He ends a mortal life to advance His immortal interests on earth. Gifts that cannot be delivered without a person's death always should give us pause to consider the correlation between salvation and gift planning. Christ died to give. So do His followers. That transforms our view of estate gifts into a sacred trust flowing from a relationship endowed through Christ's death. A proper understanding of this sacred trust of eternal relationships will ultimately inform our entire ministry of development.

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