

GETTING GIFTS FROM PRESBYTERIANS

STATISTICS

1. Baby boomer or Americans born from 1946 to 1964 will inherit \$8.4 trillion at 2009 levels, a new study reports
 - a. With \$2.4 trillion already received
 - b. Study shows wealthiest boomers will be given \$1.5 million, low side \$27,000
 - c. Most boomers will receive their inheritance late in middle age on the death of a surviving parent
 - d. Only 17% of boomers had received an inheritance by 2007
 - e. Info from Philanthropy Journal 01/03/2011

2. Presbyterians give to their congregations; Research by Deborah Bruce, Associate Research Manager, Research Services PCUSA, Individual giving (Survey of worshipers age 15 and up)
 - a. Most worshipers make regular financial contributions to their congregations (83%); 5% don't contribute; and 12% give a small amount when they attend
 - b. The largest number of Presbyterians (38%) gives 5% to 9% of net income. Only 16% give more, while 29% give less
 - c. Fully 90% believe it is important or very important to support their congregation financially
 - d. One-third (34%) decide how much to give to their congregation based on an annual dollar figure
 - e. 27% decide based on a weekly amount
 - f. 13% base their giving on percentage of their income
 - g. Average gift per member per year given through the offering plate is \$1,108
 - h. Six in ten (64%) completed a pledge card or made some other sort of commitment for congregational giving for the year
 - i. Nine in ten make financial donations to organizations other than their congregational giving for the year
 - j. Nine in ten also make financial donations to organizations other than their congregation (such as charities or social services groups)
 - k. Tithing % low, average under 5% of congregation
 - l. 80% of Presbyterians have wills, 1 out of 8 has put the Church in their will, why so low, they are not asked
 - m. 2009, bequests to Presbyterian Churches drop 20%
 - n. Not for profit industry bequest make up 7% of total giving, PCUSA between 4-5% of total giving
 - o. 25% PCUSA churches receive a bequest in an given year

- p. Of the 25% average bequest income was \$44,000 in 2009
- q. 75% of PCUSA churches receive NO bequest money in a given year

2. Why do they give?

- a. Gratitude for God's love and goodness
- b. God loves each of us and makes a difference in our everyday life
- c. God owns everything, we are temporary managers of His resources
- d. Religious donors view philanthropy as a form of worship and an expression of gratitude
- e. Religious donors seek to act on deeply held values and goals
- f. They could make a difference and give back to the community
- g. They felt financially secure
- h. They felt the charity they gave to was run efficiently
- i. The more a donor volunteered the more they gave

3. Why wealthy Americans stopped supporting charity

- a. Too frequently solicited/ asked for inappropriate amount
- b. Decided to give to other causes
- c. Household circumstances changed
- d. Organization changed leadership
- e. No longer involved with charity
- f. Program/purpose completed
- g. Inaccurate recordkeeping
- h. Donations from wealthy Americans dropped 35% from 2007-2009

4. Studies show religious Americans

- a. Are unusually active in civic life
- b. Have faith traditions that inform and motivate their philanthropy
- c. Share their resources more generously than others
- d. Give to both religious and secular organizations

THE MAJOR GIFT PROGRAM OF THE CHURCH

Fund Raising coordination through Generosity/Stewardship Team

1. Prospect Identification, finding the passionate investor in Gods work

- a. Data collection
- b. Past giving
- c. Peer evaluation, amount and best relationship
 - i. Rating process
 - 1. A \$50,000 and up
 - 2. B \$25,000 to \$50,000
 - 3. C \$10,000 to \$25,000
- d. Outside donor research DonorSearch

- e. Honor/memorial gift opportunity
 - f. Endowment giving opportunity
2. Cultivation, building relationships and sharing the vision
 - a. Strategic plan, people will invest when they know where the Church is going and why
 - b. Marketing your strategic plan
 - c. Storytelling and testimonials communicate the values and beliefs of the donor, tell the story of how the gift made an impact on the strategic plan
 - d. Identifying the investment opportunities of the strategic plan
 - e. Hold meetings to discuss the plan
 - f. Pastors need to be part of selling the plan, Pastor is the CEO of the organization
 - g. Celebrate the investments in the plan
 3. Solicitation, Opportunity for Stewardship and Generosity
 - a. Determine scriptural bases for campaign
 - b. Understand Generational giving
 - c. Capital campaign verses project oriented campaign
 - d. When asking for major gift investment, must include support of annual stewardship campaign
 - e. Develop and approve gift acceptance policy and naming opportunities
 - f. Establish solicitation team, members of Church that includes leadership and Pastor, personal ask
 - g. Solicitation should be seem as a ministry, giving people the opportunity to invest in Gods will on earth
 - h. Assign major gift prospects to solicitation team members, whom ever has the best relationship and has been involved with the cultivation process
 - i. Discuss if this call is with the individual or couple
 - j. Understand the history of the prospect or couple, data kept in the Church data base
 - k. Determine the invest ask amount and which project would excite the prospects passion
 - l. Decide if prospect is interested in naming opportunities
 - m. If you don't ask, the answer is NO
 4. Solicitation, Alternative ways of making a major gift
 - a. Outright gift
 - i. Stock, cash, property, insurance policy, antiques
 - ii. Paid over a period of time, not more than 3 years
 - b. Planned Gifts, planned giving ongoing program
 - i. Wills
 - ii. Annuities

1. How the gift can give to donor and Church
 - iii. Trusts
 1. Family Trusts
 2. Generational skipping trusts
 - iv. IRAs
 - v. Help from outside affiliated organizations
 1. Presbyterian Foundation
 2. CICF
 3. PEER
5. Recognition, Expressing Appreciation and celebrating Generosity
 - a. Greatest reward is the relationship growth of the donor with God
 - b. Thank you communicated by the person or persons who did the ask
 - c. Naming opportunities presented and discussed
 - d. Planned Giving cross wall
 - e. Potential testimonial of donor to other prospects or congregation
 - f. Ask donor for other who might want to invest in the opportunities, possibility of moving donor to volunteer solicitor.
6. Questions