

CREATING A SUCCESSFUL PARISH LEGACY SOCIETY

Prepared by
Glenn Ledbetter
Emmanuel Episcopal Church
Mercer Island, Washington

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Planned Giving Program
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“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.”

The Book of Common Prayer, 1979, pg. 445

STEPS TO CREATING A SUCCESSFUL PARISH LEGACY SOCIETY



This outline lists recommended steps in an order that has proven successful. Individual congregations may adapt and modify it to meet their unique circumstances and goals.

1. Canvass church leaders on planned giving.
2. Observe an annual Legacy Sunday on church calendar,
3. Adopt fundamental documents for planned giving ministry.
 - a. Endowment By-Laws
 - b. Endowment Investment and Spending Policy
 - c. Parish Gift Acceptance Policy
 - d. Charter for Legacy Society
4. Create, fund and commence operations of an Endowment Fund and an Endowment Operating Fund by Endowment Board of Trustees.
5. Conduct Wills Awareness Program.
 - a. Legacy Society Founding Membership Drive
 - b. Legacy Society Celebration Event
 - c. Bishop's Society Membership
6. Continue annual Legacy Society recruitment and events,
 - a. Sustaining Membership Drives
 - b. Education Program
 - c. Cross-Generation Program
 - d. Fund-raising Program
 - e. Memorial Gifts
 - f. Wills Awareness Program
 - g. Periodic Gatherings
 - h. Celebrations
7. Sample Charter for Legacy Society
8. Sample Prayers of the People for Legacy Sunday Celebration
9. Sample Outline for Worship Service for Legacy Sunday
10. Resources and Contacts

ANNOTATED STEPS TO CREATING A SUCCESSFUL PARISH LEGACY SOCIETY

1. **Planned Giving Canvass.** Conduct a one-on-one canvass of church leaders (both clergy and lay persons) on the proposed or existing Planned Giving Ministry. Determine what positives and negatives the opinion leaders perceive in your congregation. Discern what approaches, products and services will find either opposition or support.
2. **Legacy Sunday.** It is vital that clergy be willing to preach on this ministry. The congregation's long-range giving and savings program must plant its roots in scripture *and* flower in service to others for the glory of God. The chosen date should have some thematic relevance, and the service should contain music and other elements that are unique memorable. Suggested dates include Rogation Sunday (the Sunday before Rogation Days), All Saints/All Souls Day and Memorial Sunday (the Sunday during Memorial Day weekend). Legacy Sunday should become a tradition that is anticipated, enjoyed, appreciated, and celebrated.
3. **Fundamental Documents.** It is not necessary to have all these fundamental documents in place prior to commencing the observance of an annual Legacy Sunday. Indeed, Legacy Sunday services will facilitate the preparation, adoption and dissemination of these necessary documents. Before soliciting planned gifts from parishioners, the congregation should have written policies that answer three basic questions: (a) how is the parish using my money; (b) how will the parish use my money; and (c) if I give you my assets, will they be safe? Guidelines and sample documents are available from the Episcopal Church Foundation.
 - a. **Endowment By-Laws.** Here, the Vestry delegates certain authority and responsibility to another body. Because its duties and responsibilities include decision-making powers regarding the fiduciary management of church funds, it is fundamentally different from a committee or a commission. As the Endowment Board, it should be administered by a Board of Trustees or Directors, reporting to the Vestry. Optimal size is four to seven. Besides the duty of sound financial management, the Board should also be charged with marketing and growing the Endowment Fund to an effective size for the ministry it is intended to support. The By-Laws may authorize creation of separate, designated funds within the Endowment Fund for handling certain large gifts. For investment purposes, these assets are merged with other assets of the Endowment Fund, but the identity and designated purpose of each fund is preserved individually. The By-Laws should establish a mechanism (see paragraph 4 below) for funding the administration of the Endowment Fund and the Board's programs.
 - b. **Endowment Investment and Spending Policy.** Within the broad framework established through the By-Laws, this separate document addresses the specific investment and spending guidelines to be administered by the Board. It is suggested that the Endowment Board prepare this document for Vestry adoption. Identified here are the requirements for preserving the fund's corpus, the conditions under which monies may be disbursed to the Vestry, the method for calculating the amount of such monies to be disbursed, and the pre-approved purposes for which such monies are to be used in ministry. It is critical that the selected uses have strong public appeal and support among the parish. These uses must target needs that stir people's passions and raise their self-worth as parishioners – these monies should not be expended for routine, mundane, ordinary operational needs, no matter how opportune or necessary these may be.

- c. **Parish Gift Acceptance Policy.** It is suggested that the Endowment Board prepare this document for Vestry adoption. The scope is parish-wide, providing guidelines both to various representatives of the congregation who may be involved in the acceptance of gifts, to outside advisors who may assist in the gift-planning process, and to prospective donors who may wish to make gifts to the parish. The vestry will review, accept *or* reject gifts of various kinds, forms and values. It defines “designated” and “undesignated” (i.e., "restricted" or "unrestricted") gifts and establishes the policies for handling each.
 - d. **Charter for Legacy Society (LS).** It is suggested that the Endowment Board obtain the consent of the Vestry to create and operate a parish Legacy Society. The Board may then prepare and adopt the society's charter. The charter expresses the purpose and activities of the society. Its operations may be funded through the Endowment Operating Fund (see paragraph 4 below). The charter establishes requirements for membership in the society. Often, two membership categories are authorized and defined: founding members and sustaining members. Founding Members usually are determined through an open registration period with a fixed deadline.
4. **Commence Operations.** The commencement of operations of parish Endowment Fund requires only an initial gift and adoption of Endowment By-Laws. The Board may then precede forthwith on remaining foundation documents. Gifts are solicited and received, monies deposited and invested, and certain earnings are transferred to the Vestry and spent. Meanwhile, it costs money to administer the Endowment Fund and operate the Legacy Society. For this purpose, it is suggested that the Endowment Board establish an Endowment Operating Fund (EOF) under the aegis of its By-Laws. The source of funds for the EOF may be direct donations or periodic withdrawals from the Endowment Fund. All Endowment operations are subject to audit review annually.
5. **Conduct Wills Awareness Program (WAP).** This marketing program has been developed by the Episcopal Church Foundation and the Diocese of Olympia Planned Giving Program and is available in print and on CD. Its purpose is to encourage parishioners to include an estate gift to the church in their wills and other plans. Optimally, it requires about one year to complete and should be conducted every three to five years. Ninety percent of all legacy gifts come from simple bequests in a person’s will.
- a. **Legacy Society Founding Membership Drive.** For maximum success, it is suggested that the growth and development of the Legacy Society be coupled, and run concurrently, with the Wills Awareness Program. The LS membership drive may conclude shortly after completion of the WAP. If the Endowment Board elects to establish two membership categories within the society, then initially, it would be the Founding Membership drive that would conclude shortly after WAP. It is important to set SMART goals that are Specific, Measurable, Attainable, Relevant, and Time-based. The WAP contains a generic marketing plan, complete with many time-saving sample documents, for achieving these goals.
 - b. **Legacy Society Celebration Event.** It is suggested that completion of the WAP and the Legacy Society Founding Membership Drive culminate in a celebration on Legacy Sunday, both at church services and with a complimentary dinner/reception for the Founding Members.
 - c. **Bishop’s Society Membership.** The Bishop’s Society was created within the Diocese of Olympia in 1993. It is composed of those who have named any Episcopal Church or ministry as a beneficiary in their wills or other estate plans. A member of a parish Legacy Society, therefore, automatically qualifies as a member of The Bishop’s Society. In 2009 membership totaled nearly 1300 members from 80 congregations. About 10% of the members have passed away.

6. **Continuing Operations.** Once a Legacy Society is formed, it must function. It is honorary in nature, but the parent body, the Endowment Board, is an action body, charged with marketing to ask for and receive gifts continually from donors. There are numerous activities and events which will sustain and grow the Legacy Society.
 - a. **Sustaining Membership Drives.** The WAP is a well-organized and effective program that has been implemented successfully in the Diocese of Olympia. New members should be annually recruited, welcomed and honored in the Legacy Society.
 - b. **Education Program.** Seminars, special sermons, booklets, brochures, flyers, web pages, and such should be developed to facilitate awareness of and enrollment in the Legacy Society. Such events and materials may be scheduled and disseminated throughout the year, perhaps in conjunction with other ongoing educational ministries within the parish. Certain activities may be clustered on and around Legacy Sunday to enrich the experience. A Legacy Week or Legacy Season may evolve. To maintain continuous awareness of the society and planned giving opportunities, take advantage of the support offered by the Episcopal Church. Other vendors include The Sharpe Group, www.sharpenet.co, Crescendo Interactive, www.crescendointeractive.com.
 - c. **Cross-Generation Program.** Most planned gifts come from the older generation who are grateful for the benefits the church has provided to themselves, their families, relatives and friends and to the community and world at large. They value this so highly that they want future generations to have similar opportunities and benefits. They believe that a community and the nation are better off for having a church in that community. At death, their final witness is a gift to future generations. This need not be only an abstract thought, a noble idea. There are youth right there in your parish right now. The cross-generation program puts the two groups together through one or more events and activities so they can connect and interact. For example, the youth might serve tables at an annual Legacy Dinner and perform a suitable skit or play afterwards for entertainment. A favorite is for the older generation to help teach stewardship as part of the youth education program, covering spending, saving, and sharing (e.g., tithing, charities, and planned giving). The young people would study money management throughout the church year and on Legacy Sunday present their special collective saving annually to the Endowment Fund, in both gratitude and anticipation, looking backwards and forward in the life-cycle of their home-town parish. In a role reversal, their example motivates the older generation to leave a gift to the church and become members of the Legacy Society. The symbolism of the old and young, united in one purpose, is very powerful.
 - d. **Fund-Raising Program.** The Legacy Society is strictly for planned gifts, but the Endowment Board can promote the society not only by the methods above and below but also by special fund-raising events. In other words, you do not have to die to contribute to the Endowment Fund. A parish feast, fair, festival, or series of small-group events and activities could be organized to highlight and benefit the parish planned giving ministry.
 - e. **Memorial Gifts.** At memorial services, the family usually indicates the preferred charities to which memorial gifts may be donated in honor of the deceased. The parish Endowment Fund should be among the options considered by the family prior to printing the obituary, press release and service program. If the deceased was a member of the parish Legacy Society, it would be appropriate to mention this in these documents.

- f. **Periodic Gatherings.** For a group to feel cohesive it must behave like a group— it must gather and do something together. The Legacy Society should assemble at least annually. In addition to the events mentioned in 6.d above, others include a dinner, concert, lecture, tour, pilgrimage or retreat. For example, a Harvest Dinner in September or October is appropriate. Whatever the gathering, a spiritual dimension related to legacy gifts should be incorporated in the experience. Create a buzz!

- g. **Celebrations.** Provisions should be made, of course, within all elements of the planned giving ministry to accommodate those who wish to remain anonymous. Most people, however, understand and accept the promotional value inherent in publicly celebrating exceptional achievements and gifts. Estate gifts, as a product of one's life and legacy, regardless of amount or value, are indeed quite special and worthy of public honor. A giver can never be thanked too often. Hand-written thank you notes should be used abundantly and prolifically for every gift of talent, treasure and time by anyone throughout every phase, event and activity of the parish planned giving ministry. Joyous music and good humor also are universally appreciated. Smile, celebrate, and praise God!

7. Sample Charter for Legacy Society

CHARTER
of the
EMMANUEL LEGACY SOCIETY
(Revised 1 August 2004)

With the consent of the Vestry (see Vestry Agenda and Minutes, 23 May 2000), the Emmanuel Legacy Society (ELS) is hereby created by the Endowment Board of Trustees, effective Sunday, 27 May 2001.

The purpose of the ELS is to acknowledge gratefully those faithful persons who have made provisions to leave a documented gift of a portion of their accumulated assets to Emmanuel Episcopal Church at the end of their lives.

Membership in the ELS shall be classified as either (1) Founding or (2) Sustaining. A **Founding Member** is one who informs the Endowment Board, during the period from 27 May 2001, through a date to be determined in the spring of 2003 [actually, 23 May 2004], that he or she has included Emmanuel as a beneficiary in his or her will or estate plans. A **Sustaining Member** is one who does so after said date. Members shall indicate either their consent to having their names listed publicly or their request to keep their identity anonymous.

To thank the generous members who so lovingly sustain the mission of the parish by joining the ELS, a “Tree of Life” plaque, engraved with their names, is to be designed for presentation to the church at the close of the Founding Member enrollment period. Each year, the names of new Sustaining Members will be added to the plaque.

The Endowment Board shall conduct a continuous program to encourage membership in the ELS. Not less than annually, the Endowment Board shall sponsor a special event to honor members of the ELS.

Adopted this 16th day of April 2001, by the Emmanuel Endowment Board:

Lee Anne Edwards, Chairperson

John C. Fry, Jr., Trustee

Frank Schembs, Trustee

B. Glenn Ledbetter, Trustee

Joanne Hoover Volberding, Trustee

8. Sample Prayers for Legacy Sunday

LEGACY SUNDAY SAMPLE PRAYERS OF THE PEOPLE

Dear Lord, we know that all good things come of thee; accept our gratitude for the bounty we share in our lives, in this church, in this community, and in this nation.

In thy mercy,

Hear our prayer.

Dear Lord, as your sons and daughters, we carry your name; we acknowledge you as our creator and our source; we thank you for entrusting us with many talents, gifts, and abilities; we pray that with guidance from the Holy Spirit, we shall be good stewards of your resources, to the glory of your name.

In thy mercy,

Hear our prayer.

Dear Lord, on this Legacy Sunday, we covenant that we shall apply our energy and intelligence to acquire, manage, and use our earthly, financial wealth to do good works in this world, to the glory of your name.

In thy mercy,

Hear our prayer.

Dear Lord, we acknowledge that our fortunes exist to thank you for your love and grace, to provide for our families, to bless those we love, to produce things of excellence with lasting value to others, and to support those transcendent causes which feed souls, to the glory of your name.

In thy mercy,

Hear our prayer.

Dear Lord, we pray that when we do these things with our financial wealth, we shall know in our hearts that we are helping to fulfill your purpose in our being, that we are making a difference to others, that the world is a better place for our having lived, and that our spiritual journey with you has true and everlasting significance, to the glory of your name.

In thy mercy,

Hear our prayer.

Dear Lord, we pray that this congregation, Emmanuel (“God is with us”), shall continually renew itself, so that this church shall be here to serve generations to come, future individuals and families, lost souls in need of redemption and reconciliation, and others in this community and the world, to the glory of your name.

In thy mercy,

Hear our prayer.

Dear Lord, we pray with our brother and savior, Jesus Christ, that in these and in all things, thy will be done.

In thy mercy,

Amen.

9. Sample Service for Legacy Sunday Celebration

LEGACY SUNDAY At Emmanuel Mercer Island, Washington May, 2007

Legacy Sunday is a special worship service organized around the theme of planned giving. With consent of the clergy, the prime sponsor of the “legacy features” of this service is the Emmanuel Endowment Board, which bears most of the duties and costs for those extra features. The music program helps sponsor the bagpiper, and sometimes an anonymous donor(s) may pay certain costs. Like a baptismal service or a visitation with the Bishop, this service may run slightly longer than normal, so it must be special in all respects. The 8th Annual Legacy Sunday at Emmanuel, Mercer Island, Washington is being held on 20 May 2007. We always hold it in May, and over the years, the service has evolved into tradition. Each year, we try to refine and improve it. Here is the basic format that modifies the regular Episcopal worship service.

Opening Prayer – As people arrive, ushers give people the “Sunday Bulletin” and direct them to our Memorial Garden (outdoor columbarium). Inserted in the bulletin are (1) a registration form for the Legacy Society, (2) a handout on Legacy Sunday, the Society, and the Endowment Fund, and (3) the hymn, “Amazing Grace” (all verses). The handout can be a flyer, brochure or booklet. We always want people to have something informative to take home. In the garden, the worship service begins when the priest gives a short talk and prayer in remembrance of those generations of parishioners who preceded us and left us with the legacy of our church. This 5-10 minute program is a time of communion with these saints from our past.

If Legacy Sunday happens to be scheduled on “Rogation Sunday” (the Sunday before Rogation Days and Ascension Day), the priest typically alludes to that practice and its significance. If it is scheduled on Memorial weekend Sunday, the priest enfolds the import of that national holiday into the remarks and prayer, acknowledging and expressing gratitude to our predecessors for the legacies they left to us.

A bagpiper then leads the procession into the church, playing “Amazing Grace,” as we follow the acolytes and clergy and sing along. Sometimes, as we enter the church and find our pews, the organist joins in a duet with the piper, who proceeds to the front of the nave, turns and faces the congregation, and completes the hymn. This experience can be quite thrilling. The piper then leaves, and the regular service begins on a high, expectant note.

Music – Coordinating with clergy, the Music Director selects the music and the piper for the service. There are few, if any, traditional hymns in *The Hymnal 1982*, that are explicitly about money, giving, stewardship, or legacies. However, some songs or hymns seem to complement the legacy theme, such as Hymn 589, or one may turn to suitable religious music from other sources.

Sermon – In late December or early January, the rector has designated which Sunday in May will be Legacy Sunday. About a month ahead, the homilist has been briefed about Legacy Sunday by the Endowment Board. If the homilist chooses to do so, he/she may integrate into the sermon all the ideas of legacy, planned giving, scripture readings, and if applicable, either Rogation Days and/or Memorial Day. Sometimes the main emphasis is on the scriptures, and the other ideas are related to them. Sometimes the main emphasis is on the leaving a legacy and the other ideas are related to that. Given enough preparation time, the clergy are amazingly adept at integrating all these elements. We have had priests; an associate priest, a lay person, and a friar deliver the sermon.

Presentation – Usually just before the peace is offered, a member of the Endowment Board is given the opportunity for a brief presentation to the congregation at both 8 and 10 o'clock services. [We have not yet done so at our new 5 o'clock Sunday evening contemporary service.] Usually this consists of several elements, each of which must be kept very brief. First, there is a report on the current size, recent growth (or decline) of the endowment fund, and the amount of spendable net proceeds from previous earnings that are to be turned over to the Vestry this year. An over-sized, ceremonial check is presented to the Senior Warden or other representative of the Vestry. The report may also include a statement of how last year's earnings were used by the Vestry. The ultimate growth goal for the fund is re-stated, and the next milestone or threshold is highlighted.

Second, there may be a report on the cross-generational support between the Endowment Board and the Journey to Adulthood (J2A) youth program. Every year, the J2A group conducts fundraisers to defray costs of its biennial, summertime pilgrimage. One year, the Endowment Board furnished each member of the group with a copy of a very anecdotal, readable book on money management, *The Richest Man in Babylon*, which they incorporated into their curriculum. In turn, the J2A pledged to tithe to the endowment fund from its fundraisers. At the Legacy Sunday service for each of the two years leading up to the pilgrimage, a representative of J2A presented a ceremonial check to the endowment board. The amount was not nearly as significant as the impact on the youth who were actually doing this and on the parents and other parishioners witnessing it. The symbolism of such gifts is very powerful. The youth are saying "thanks for providing this church for us and future kids" to the older generations, who are deciding whether and how much to leave Emmanuel in their wills and other estate plans.

Third, in lieu of the second item above, the speaker may give concise testimony on the personal significance of legacy giving.

Finally, the congregation's attention is invited to the handout materials, and a simple, short, direct appeal is made to leave a legacy gift to Emmanuel and thus join the Emmanuel Legacy Society and the Bishop's Society.

Prayers of the People – In the past, we have simply expressed gratitude in these prayers for the legacies of those parishioners who preceded us. A refinement would be to orient the entire "Prayers of the People" toward legacy giving and stewardship. Attached is a draft written by a layman with no training in liturgy. If this prayer is acceptable to clergy, it could be used. If not, then a modified approach, with clergy permission, would be to insert one paragraph into the regular prayers from the Book of Common Prayer which are being used that day. Attached is such a draft paragraph.

Dismissal – As the recession is being organized, the piper appears again. He/she either plays and leads the recession from the altar to the narthex or stands with the organist in the choir loft for a duet during the recession. "Highlander Cathedral" is very popular here—it can stop people in their tracks and bring tears to some.

Fellowship Hour – Extra effort is made to follow this special worship service with a festive event and make Legacy Sunday truly pleasurable and memorable. The intent is to express gratitude through hospitality, "create a buzz," and "give 'em something' to talk about." The treats themselves are special (e.g., KrispyKremes, or anything considered "different and better," may be added to the usual treats). They may be presented in self-serve style on the usual tables, and they also may be served on trays by roving waiters who are either church youth and/or trustees of the Endowment Board. In 2007, we are introducing a "hot chocolate fountain," flowing with melted chocolate into which one dips chunks of angel food cake or various fruits. Meanwhile, just outside, in full view through the narthex windows, the piper plays several tunes and Celtic dancers perform. People may watch and listen either indoors or outdoors as they enjoy coffee, tea and desserts and talk with friends and visitors. The energy is electric, the eyes are bright, the smiles are broad, and the applause is warm and enthusiastic.

Future Innovations – Legacy Sunday may someday evolve into "Legacy Weekend," commencing with a festival/workshop/seminar/pilgrimage/concert/blessing-of-the-gardens/fundraising event, or such, on Saturday and culminating in the worship service on Sunday.

10. Resources and Contacts

Resources

Ashton, Debra, *The Complete Guide to Planned Giving*, 2008

Diocese of Olympia, *Life Planning Manual*, 2008 (see www.ecww.org)

Crescendo Interactive - www.crescendointeractive.com

Diocese of Olympia, "The Living Tree" brochure and campaign.
Contact Carl Knirk, cknirk@ecww.org

Dominguez, Joe, Robin, Vicki, Tilford, Monique, *Your Money or Your Life*, 1992.

Emmanuel Episcopal Church, Mercer Island, WA, various parish infrastructural and promotional documents re: endowment and legacy society, 1999-2004.

Episcopal Church Foundation, *Funding Future Ministry*, 2000.

Nenieih, Maria, *The Energy of Money*, 1999,

O'Hurley-Pitts, Michael, *The Passionate Steward: Recovering Christian Stewardship from Secular Fundraising*, 2002.

Sturtevant, William T., *The Artful Journey: Cultivating and Soliciting the Major Gift*, 1997.

Twist, Lynne, *The Soul of Money*, 2003.

Westerhoff, The Rev. Dr. John H., *Grateful and Generous Hearts*, 1997, St. Luke's Episcopal Church. Atlanta. GA.

Contacts

Carl Knirk, Canon for Planned Giving /Stewardship and Evangelism, Diocese of Olympia, P.O. Box 12126, Seattle, WA 98102, 206-325-4200 ext. 2016, www.ecww.or, cknirk@ecww.or.

Glenn Ledbetter, Member, Emmanuel Episcopal Church, P.O. Box 623, Mercer Island, WA, 98040-0623, 206-200-6767, www.johnlscott.com/glennle, glennled@aol.co.

Ministry of Money, 1640 Columbia Road, N.W., Washington, DC 20009
www.ministryofmoney.org. office@ministryofmoney.or.

Morehouse Publishing, 4775 Linglestown Road, Harrisburg, PA 17112, 800-877-0012,
www.morehousegroup.com/mp.ht.

The Episcopal Bookstore, 3S37 Stone Way N., Seattle, WA. 98103, 206-545-0500, 800-803-6223,
www.episcopalbookstore.co, info@episcopalbookstore.co.

The Episcopal Church Foundation, 815 Second Ave., New York City, NY, 10017-4564, 800-697-2858,
www.episcopalfoundation.or, all@episcopalfoundation.or.

The Episcopal Network for Stewardship (TENS). *a* membership organization for general stewardship education, 345 S. Hydraulic, Suite A, Wichita, KS 67211, 800-669-2669, <http://TENS.or>, TENS@TENS.or.

The Consortium of Endowed Episcopal Parishes, a membership organization for parishes with endowments of one million dollars or more, 2122 Sheridan Road, Evanston, IL, 60201, 847-864-5863,
<http://endowedparishes.or>, ccannon@endowedparishes.or.

