

****Parish Planned Giving Committee****

Sample Yearly Activity Timeline

January

Send thank yous for any significant end-of-year gifts (i.e. \$250 or more)

Include bulletin message for one Sunday (see resource manual **Promoting Planned and Endowed Gifts at Your Parish or School**, some have messages that coincide with Liturgical calendar)

Update pamphlet rack for the new year - be sure to include bequest and endowment brochures

February

Include bulletin message for one Sunday

Mail charitable gift annuity flyer and letter from pastor (or committee) to parishioners 65 and over with reply card and return envelopes (contact Planned Giving Office for camera ready cards and envelopes). **Note: If you are concerned about conflicting with the Lenten Season, considering sending flyer in June.**

FYI, Catholic Foundation Board of Directors Meeting (third Thursday)

Catholic Foundation Quarterly Report sent to participants

March

Inquire about putting *Please remember [parish name] in your will* in small type on the cover of the bulletin

Include bulletin message for one Sunday

April

Assist parish leaders in their efforts to promote Diocesan Stewardship. Encourage gifts of stock to the appeal.

May

Consider establishing a planned giving corner in the bulletin

Include bulletin message for one Sunday

FYI, Catholic Foundation Board of Directors Meeting (third Thursday)

Catholic Foundation Quarterly Report sent to participants

June

Most charitable giving is done in June and December. Remind parishioners in bulletin that June 30 is the end of parish fiscal year. Any gift of appreciated stock is welcomed and appreciated.

July - Take A Break!

August

Aug. 1 - Catholic Foundation end-of-year earnings statements mailed to participants (decisions due back on Aug. 31); consider strategy of reinvesting some of your earnings to grow corpus.

FYI, Catholic Foundation Board of Directors Meeting (third Thursday)

Catholic Foundation Quarterly Report sent to participants

September

Begin to organize November seminar (see Guide for Conducting an Effective Wills Seminar for ideas on time, food, evaluation and follow-up)

September, cont.

Possible topics and / or target groups*:

Woman over age 55 - basic estate planning

Couples over age 55 - basic estate planning

Planning for retirement - how much is enough?

Planning for children's college education

Saving taxes through estate planning

End-of-life issues (living wills, powers of attorney, funerals, etc.)

*each one of these seminars could include a stewardship of assets presentation by the Director of Planned Giving

Contact attorney or other estate planning professional for seminar, as well as Diocesan Director of Planned Giving

September 15 - Catholic Foundation earnings checks mailed to participants (consider publishing in bulletin or parish newsletter what the parish plans to use earnings for)

October

Send out invitations with "regrets only" RSVPs for next month's seminar - give target audience to parish secretary who can use Parish Data Systems to send letter (contact Sue Weeg at Diocese with any questions)

Determine food for seminar and who will serve it

Begin bulletin reminders for seminar one month in advance

November

Place flyers in bulletin the week prior to seminar

Make announcements from pulpit two weeks prior and a week prior to seminar

Conduct Estate Planning seminar

Send thank yous ASAP to attendees from pastor (John Sentovich also sends one from him and attorney highlighting what was checked off on evaluation form)

Follow up with anyone who needs immediate assistance

Place end-of-year bulletin insert from the Catholic Foundation in the bulletin, or obtain end-of-year giving brochures from Robert Sharpe Co. 800/238-3253 or Stelter Co. 800/331-6881 (enough for mailing to all households or enough to stuff in bulletin mid-December)

Include end-of-year bulletin message the last two Sundays

December

Have pastor thank people from the pulpit for their generosity and remind them to remember parish in Will or estate plan

Early December, mail end-of-year brochure with letter from pastor (or committee) to all households or place in bulletin the second Sunday of December

Include bulletin message every Sunday in December, including flyer that shows various ways to make gifts to Foundation account (see resource manual)

Have stock transfer forms in back of Church and on bulletin boards

Reward yourselves for work well done!!

Evaluate your efforts during the new year and make adjustments. At some point, consider establishing a "legacy society" at the parish for people who have made gifts of \$500 or more to your endowment fund or have remember parish or school in their will or trust. Check out the endowment tree idea at St. John Neumann in St. Charles (feel free to contact Terri Regan at the parish, 630/377-2797 for ideas) or the endowment drive done at St. James in Rockford, which has generated close to \$400,000 in endowed gifts!

Planned Giving Committee Evaluating Your Efforts

Ask yourselves at the end of each year:

Ongoing education

Do we, as a committee, feel more comfortable with the planned giving message, both from a practical and a spiritual perspective?

Have we taken time during the year, at Finance and Pastoral Council Meetings, to educate other parish leaders about planned giving?

Do we better understand how planned giving fits into the overall mission of the parish?

Charitable Gift Annuities

Has anyone included the parish or school as the remainder of their gift annuity? (Contact Office of Stewardship Development)

Did we receive more inquiries about gift annuities than last year?

Have we given the majority of people over 65 in our parish an opportunity to understand how a gift annuity works?

Have we contacted the senior group in our parish with this gift giving opportunity?

Wills and Seminars

Did we receive any bequests this year? Can they be attributed to any of our efforts (i.e. did they attend one of our seminars in the last several years or has someone met with them personally to discuss the distribution of their estate)?

Did our attendance at this year's seminar exceed last year's? If yes, what do we attribute it to? If no, do we need to make some changes for next year? (i.e. change time, topic or audience)

End-of-Year Giving

Did December's gifts of \$250 or more grow over last year?

Did we receive more end-of-year gifts of appreciated stock than last year?

Miscellaneous

(Ongoing) Have we introduced a new idea this year? (i.e. letterhead idea, new bulletin insert, different type of seminar)

Have we established a giving society with an annual thank you Mass and Brunch?

If we have a Foundation account, are we promoting gifts to it on a regular basis? Do all of the attorneys, CPAs, and Financial Planners in the parish know about our account?

Do we have accounts at local brokers to facilitate the transfer of stock?

Was the message of planned giving shared at least once from the pulpit this year?

Have we contacted another parish in the Diocese recently for some fresh ideas?