



**Sarah Callahan | Executive Director, Lutheran Giving**  
**402.342.5728 | [scallahan@lutherangiving.org](mailto:scallahan@lutherangiving.org)**

### ***A Guide for Congregations: Gifts to Expand Ministry***

Giving through accumulated, inherited, and appreciated resources may be called “asset stewardship.” As people of God, just as we are encouraged to give for the Lord’s work from our annual income, we are encouraged to give from our accumulated resources during life or at death. As “asset stewards” planning for the distribution of lifetime accumulations, we take a vital step in completing our stewardship plan.

### ***The Ministry of “Asset Stewardship” in the Congregation***

The central role of the endowment fund leadership is to enhance the outreach of the congregation by introducing members to “asset stewardship” and encouraging their growth in whole-life giving. Remember to coordinate efforts with annual stewardship. Giving to the congregation’s mission endowment fund is a continuation of annual giving of income. Leadership can focus on their role through these four actions – educate, encourage, enlist, and excite.

- Educate***      Share the mission and vision of the mission endowment fund. Help members see how it fulfills the congregation’s mission statement. Create a program through printed and electronic communication, seminars, and other resources that teach people about planned giving and charitable estate planning.
  
- Encourage***    Provide events/programs that assist each member in realizing their charitable dream. This would include highlighting the programs which the mission fund supports or would like to support in the future.
  
- Enlist***        Invite and ask individuals for their commitment to the mission fund. Both current and planned gifts of accumulated assets can be beneficial.
  
- Excite***        Celebrate the “gift of giving” within the life of the congregation. This means saying thank you for the gifts from faithful stewards! Occasions for celebration provide opportunity to *educate, encourage, & enlist* the participation of others. Celebrate the distributions made and find ways to say thanks seven times!

### ***Creating a plan to encourage giving – 3 suggested action steps:***

1. Write a purpose statement for the mission endowment fund and share it with members of the congregation through a Mission Endowment Fund brochure (samples available.)
  
2. Encourage each member of the committee to make their own personal commitment of a portion of their accumulated assets to the mission endowment fund.
  
3. Develop a promotional plan to be initiated over the next two years which will educate, encourage, enlist, and excite others for engagement and support of the mission endowment fund in your congregation.

## *Example Strategy for Promoting A Mission Endowment Fund*

The following is a sample outline of a twelve (12) month education plan.

- Month 1** Establish a “Kick-Off Sunday.” Each Sunday of this month, the bulletin should include a line “It’s coming” and the date for the kick-off/introduction to the mission endowment fund, i.e., “Mark your calendar and plan to attend.”
- Month 2** Continue the above announcement until the Kick-Off Sunday has arrived. On the Kick-Off Sunday invite the Gift Planner or other speaker to preach, lead the adult forum and sponsor a luncheon highlighting Wills/Estates/Gift Planning.
- Month 3** Include an article in the church newsletter on planned giving and sample ways to make a charitable gift (ideas and samples are available.)
- Month 4** One Sunday this month, have a bulletin insert/handout with information on the mission endowment fund. Include a tear-off piece: “Please send me more information on how I can make a gift.” (Note: some congregations prefer members send their response cards to Lutheran Giving, so the consultation is confidential.)
- Month 5** Have a temple talk, preferably a personal witness by someone who has made a planned gift to the congregation and other ministry.
- Month 6** Emphasize in this month’s church newsletter article the purpose of the mission endowment fund and what will be accomplished because of people’s generosity. Include a sample statement of how a person can include the church in their Will ... encourage use of a “Christian Preamble” to one’s Will.
- Month 7** Have an adult forum with a panel to share information and answer questions on charitable giving. Include on the panel: a Thrivent agent or other insurance professional; an attorney; a financial planner or CPA; and/or a representative from the ELCA Foundation.
- Month 8** Hold an afternoon and/or evening mid-week Estate/Gift Planning Workshop. Lutheran Giving can lead this. In your newsletter this month, explain the opportunity/benefits of making a Qualified Charitable Distribution through your IRA if you are 70 ½ years old or how a Charitable Gift Annuity works.
- Month 9** Distribute the congregation’s endowment brochure to every household in the congregation. Here are effective ways to accomplish this:
1. Committee members can personally deliver them to each household.
  2. Phone members and tell them to watch for the brochure in the mail. Mail it.
  3. Mail the brochure with a personal hand-written note from a committee member offering to answer questions.
- Month 10** Each Sunday of this month, have a brief temple talk on planned giving (a personal witness is best) or read a story on what a planned gift has done to further the gospel message (resources are available from Lutheran Giving/ELCA Foundation.)
- Month 11** Include on your annual stewardship commitment cards an opportunity to make a planned gift commitment.
- Month 12** Include in this month’s newsletter an article on what the Endowment Committee has accomplished over the past twelve months.