

# ST. PATRICK'S EPISCOPAL CHURCH, Kenwood, CA PLANNED GIVING CAMPAIGN

*Inspiration in the time of Covid-19*



**St. Patrick's Episcopal Church**  
Kenwood, CA





## Planned Giving Definition:

- ▶ A gift left to the church in one's will or trust, also called a Legacy Gift.



## Time of Change

- ▶ Three reactors in five years
- ▶ Fires, smoke, evacuations, power outages
- ▶ Covid-19



## Demographics of St. Patrick's

- 78 stewards, 94 parishioners
- Predominantly seniors
- Homeowners



## Why pursue Planned Giving

- Declining population/stewardship and revenue
- Replenish reserves
- Revenue Sustainability Plan



**Goal:** 10-12 households commit to making a Legacy Gift to St. Patrick's



## Pre-Planning; 2018-2020


- Pre-requisites
  - Confirm the will to proceed; key players (Rector, Rector's Warden, Finance Chair, Vestry) on board; a working committee, and a point person
- Key policies in place (Finance, Gift Acceptance, Conflict of Interest)
- Episcopal Foundation on board
- Case Statement
- Brochure/Materials



## Episcopal Foundation Process; three phases


- Episcopal Foundation trains Vestry
- "Life Plan" Workshop with parishioners
- "Let's Get To It", Operations to Implement Planned Giving





**Guiding Strategy:** No Pressure Appeal;  
give enough information for parishioners  
to make up their own minds

- Does not interfere/compete with the annual Stewardship Campaign
- Emphasis on pre-planning, what parts of Episcopal Foundation manual to use



# Process Implementing "Let's Get To It" Operational Plan:

- **Pre-Planning**
- January to September 2020
- Episcopal Foundation trains Vestry
- **Kick-off Event**
- "Live Plan" workshops
- Promos/articles/quotes/cartoons in eNews from the Rector
- **Testimonials**
- The "Ask" letters and Follow-up
- More articles in eNews and concluding article
- Announcement of founding "Legacy Circle" members in eNews



## Results

**Goal:** 10-12 households commit to making a Legacy Gift

**Result:** 14 households indicate their intent to leave a Legacy Gift.

**Met and exceeded our goal:**

These 14 households (18%) became the founding members of the St. Patrick's Legacy Circle.



## Context:

- ▶ 5.3% of adults over 50 have made a legacy gift commitment\*
- ▶ Less than 2% of Christians leave a Legacy Gift#
- ▶ 33% of adults would leave a gift if asked\*

\* Episcopal Foundation of Northern California

# John M. Finn Financial Consultant

We have been told by the Episcopal Foundation that St. Patrick's 18% success rate is excellent.




## Follow Up:

- Sent welcome/thank you letter
- Future ceremony where members will receive a Legacy Circle pin from the Episcopal Foundation of Northern California



## Lessons Learned

- Pre Planning pays off
- Response Surprises: Targeted prospects are not always the ones that respond
- The number of Donor Intent Forms returned is key
- Be Flexible: Plan and Adapt
- A Planned Giving Campaign is the best strategy to assure parish sustainability



**We are just one example:**  
tweak to work for you

"With God, all things  
are possible!"  
Matthew 19:26



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