

Next Steps (cont'd.)

- Regularly celebrate gifts when they are received (without talking about gift size).
- Create a visual list of names of Legacy Society members.
- Plan annual thank you events for Legacy Society members.
- Provide an annual report to the congregation that lists names and recognizes gifts.
- Include Legacy Society information in new member materials.

“I think this is one of the most important things. When we talk about the end of our lives, all of us are wondering, did we make a difference and the thing that is so exciting to me is the idea that I can still make a difference even if I’m not here. ”

~ Rev. Susan Ward Diamond

Contact Us

When your congregation is ready to start this transformative journey, please contact the Christian Church Foundation to be connected with your zone Vice President.

For more resources to help support your congregation in the Mentoring Model, visit the Mentoring Model page on our website, www.christianchurchfoundation.org/mentoring-model.

A legacy giving ministry does more than raise money for the church’s future needs. It allows individuals to leave an ongoing legacy and witness of their relationship with Jesus Christ.

A Guide to

Promoting Legacy Giving

The Mentoring Model for Congregations



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The Mentoring Model

The Mentoring Model is a relationship-based way to invite and encourage individuals in your congregation to plan for a legacy (end-of-life) gift to your church. It begins when leaders lead by example, putting their own plans in place. Individuals willing to share how their church family has blessed their life, and their desire to pass that gift on to a new generation, mentor others to reflect on the value of their church relationships. There is no arm-twisting or guilt involved. Sharing, inviting, and informing encourages those who currently support the ministries in your congregation to consider how they might continue that support with an end-of-life gift.

As individuals put plans in place for end-of-life gifts, their willingness to add their name to a public list of legacy donors further mentors and encourages others. The result is life-giving to the congregation, strengthening current ministries and envisioning future ministry opportunities. The Christian Church Foundation is available to walk alongside congregations in this process and provide educational tools to help congregants consider the various tax-effective ways of making a legacy gift.

“I don't think it's a coincidence that around the time we rolled out the Mentoring Model, our giving increased. One reason for that, I think, is that when people know part of their estate is going to the church in the future, they have more of an investment in it right now.”

~Rev. Chris Furr

Why Does it Work?

The Mentoring Model works so well because of its relational emphasis. Several years ago, an estate-planning firm did an experiment that varied the standard planning questions the firm asked it's clients. With no prompting, 5% of their clients included charitable gifts in their plans. When the firm proactively asked “Many of our clients choose to include a charitable gift in their end-of-life plans. Is there a cause you are passionate about that you would like to include in your plans?” the percentage tripled, to 15.4%, and the average value of the ultimate gift increased.

We were created to be in community. We respond to being asked and to being inspired. In church communities, when those we know, love, and respect make the invitation to give, many will respond.

Getting Started

- Contact the Christian Church Foundation so we can help you in the process and provide you with all of the resources available.
- Draft and approve or review and approve a Legacy Fund Policy. (*We recommend that you send a draft copy to your CCF Vice President for response before seeking board approval.*)
- Begin the process of determining who in the congregation may have already included the church in their end-of-life plans (this is the start of your Legacy Society list). Ask via bulletin/newsletter and then get permission to add names to the list.
- Form a Legacy Society and name it. Typically “[Name of Church] Legacy Builders” or “Legacy Partners” or “Legacy Circle”.

Can you imagine a time when your congregation would no longer be surprised receiving an end-of-life gift, but instead be surprised when a gift is not given?

Next Steps

- Create a brochure which encourages gifts, briefly describes annual distributions from the Legacy Fund, and provides a simple description of how gifts might be given.
- Schedule the initial event(s) to encourage people to include the church in their end-of-life plans. This typically includes a fellowship time, at least one person who will “witness” as to why it was important for them to include the church with a legacy gift, and a brief educational component often led by CCF staff member.
- Plan monthly newsletter articles and worship bulletin statements which encourage legacy gifts, teach about legacy gifts, or promote the Legacy Society.
- Observe All Saints Sunday annually, honoring those who have died, celebrating any gifts received, and thanking the list of Legacy Society members. Celebrate Epiphany by honoring the gifts of the magi and the gifts of your congregation.
- Schedule quarterly testimonies in worship from individuals who have included the church in their end-of-life plans about **why** it was important to them to include the congregation in their plans.