

## ASSESSING YOUR PLANNED GIVING PROGRAM

### HOW EFFECTIVE IS IT?

It is a good idea to regularly assess how a parish planned giving program is going. It will enable the parish to determine whether the program is as effective as it could be. The following questions are offered to help do that.

1. Does the parish have a well known and visible parish vision?
2. Does the parish Rector actively share the parish vision and communicate the importance of the planned giving program in the parish community?
3. Is there a dedicated planned giving team in place?
4. Does the Planned giving team work in partnership with the stewardship team? Describe how that happens.
5. Is the church leadership involved and on board?
6. Is the parish working to be faithful in making stewardship a top priority?
7. What are the dreams and goals of the planned giving and stewardship teams? Are the needs in the parish, community and church being considered as “if money weren’t an issue”?
8. Is there a team of allied professionals available to offer advice and support?
9. Is the program being communicated? Are there visible reminders of what the parish is working towards and how close it is to reaching the goal? Do you distribute planned giving brochures, put reminders in the bulletin; invite guest speakers; encourage personal testimony from people who have made a gift; circulate *LEGACY* newsletter; invite diocesan support?
10. Does the program have goals? Is there a written plan to support working towards and achieving them?

11. Is there a plan for celebration? Do you let the congregation know that a gift has been received? Is there an event each year to give thanks, and share the joy of how planned gifts will benefit your parish?
12. Does your church have a copy of “Getting Started”, an excellent diocesan resource to establish and manage your program? It is available for \$25.00.
13. Do you have a current Will? The success of your planned giving program starts with you. Lead by example. Be responsible to your family, loved ones and community by having your will current and detail it to how you would want your legacy to be shared when you are gone.
14. Have you called the diocesan Director of Planned Giving to ask for help? His contact information is as follows:

Mr. Glen Mitchell, CFRE, EPC  
Director of Planned Giving  
Diocese of New Westminster  
580- 401 W. Georgia Street,  
Vancouver, BC V6B 5A1

Tel: (604) 684-6306 (218)

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