

## Parish Planned Giving Representative A Job Description

### **Position Summary**

The Parish Planned Giving Representative (PPGR) is a volunteer and almost always a lay person. He or she will be the primary person in a parish responsible for the ministry of Planned Giving. This is a ministry to all members of a parish. The PPGR works with the rector, wardens, parish stewardship committee, and diocesan resource people to maximize the effectiveness of their role.

### **Ideal Attributes of the PPGR Volunteer**

*This ministry will appeal to someone who possesses the following attributes:*

- A firm belief in personal stewardship as part of an integrated Christian discipleship
- A passion for the future ministry of the parish and the wider church and a belief in the need to do long term planning for that ministry
- Has written a will and made provision in that will for a bequest to the Anglican church
- Enjoys and is comfortable in public speaking to large and small groups
- Enjoys and is comfortable in one-on-one discussions with individuals about their financial and estate planning
- Credibility and a perception of integrity amongst the parish at large
- Has the time available to devote up to five to ten hours per month
- A good team player and has a good working relationship with the rector
- A person of patience, as Planned Giving programs take time to bear fruit
- Some degree of financial and marketing acumen, though this does not require a major facility in this area.
- Not afraid to discuss death in a sensitive and pastoral manner with donors

### **Important Notes:**

*We strongly recommend that the parish planned giving representative undergo a police check (See detailed instructions in appendix 3). Because planned giving representatives' duties often place them in the homes of vulnerable elderly people talking about financial issues this is prudent to protect the parish, the representative, and donors.*

*This position is NOT recommended for an allied professional (eg. lawyer, estate planner, financial planner) who may be perceived, whether fairly or unfairly, to have a potential conflict of interest in advancing personal business interests by taking on this ministry.*

## **Responsibilities:**

1. To attend initial training events and annual continuing education workshops (as offered) designed to give the PPGR a basic knowledge base and skills for undertaking this ministry.
2. To act as the primary contact person between their parish and the diocesan planned giving office.
3. To act as a information source to parish leadership, keeping them informed about the ministry interests of donors in general.
4. To champion the development of a customized parish *"case for support"* to market to Planned Giving donor prospects.
5. To create awareness of Planned Giving opportunities amongst the parish at large and individual donor prospects using materials generated internally and by the diocesan planned giving office.
6. To invite individual donors to consider making a planned gift to the Anglican Church.
7. To always act ethically and in accordance with the best interests of the donor and the parish or diocese.
8. To follow-up with donors who indicate an interest in making a planned gift and enable them to turn that interest into a commitment.

## **REWARDS AS A PLANNED GIVING VOLUNTEER**

There are many rewards and satisfactions in taking on the ministry of Planned Giving in a parish. Many volunteers feel like theirs is one of the more vital ministries in the parish.

- Some volunteers take delight in the knowledge that their ministry has resulted in gifts that help secure the foreseeable financial future and viability of their parish, the diocese and the church's ministry.
- Some enjoy the important one-to-one contact with shut-ins and others who are no longer physically able to take part in many of the regular activities of the church. The planned giving visits often help these parishioners to maintain a feeling of belonging and fellowship in the parish community.
- Perhaps one of the greatest rewards derived from the ministry of planned giving is knowing that one has helped facilitate a sacred gift that allows the donor to feel like they have brought meaning to their life in the act of making a planned gift.

## **Term of Position**

This is a long-term position in a parish. Because of its unusual nature and the relationships built performing this ministry, most people may want to take this ministry on for a period of at least three years. Of course, as other interested parishioners become involved in the ministry, the term of this position will shorten.