The Role of the Rector in
Parish Planned Giving Programs

Summary

In order for a parish to implement a successful ministry of Planned Giving in the parish, the rector must play a critical role. The rector's role can be narrowed to the following general categories:

1. Stewardship education in teaching and preaching that includes promoting planned gifts as part of overall personal growth in stewardship.
2. Emphasizing that stewardship and planned giving are a valid and vital ministry within the wide array of ministries in parish life.
3. Identification and recruitment of Planned Giving parish representatives and/or committee members.
4. Identification (and cultivation where appropriate) of potential donors to the planned giving representative or stewardship committee.
5. Donor pastoral care associated with the consideration of a planned gift.

This planned giving program is intended to be lay driven and run by the laity. The central role for the rector is to be overtly supportive and to communicate the benefits to the long term ministry of the parish by attention to Planned Giving. The rector should encourage the parish representative to attend any training events. It is also recommended that the rector commission the Planned Giving person or team during worship and uphold this ministry with on-going encouragement, recognition, and affirmation.

Please see elsewhere in the appendices of this manual for a model implementation plan for your parish's program.

Ideal Attributes to Look for When Recruiting the Parish Planned Giving Representative *(see the job description elsewhere in this manual)*

Note:
Keep in mind that this list represents attributes of the <u>*ideal*</u> *candidate. Of course, finding a person who possesses all the listed attributes is a rarity. If you find that person, package them quickly and mail them (C.O.D.) to the office of Stewardship and Financial Development at Cathedral Place.*

- 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
- Who has written a will and made provision in that will for a bequest to the Anglican church
- Who enjoys and is comfortable in public speaking to large and small groups
- Who enjoys and is comfortable in one-on-one discussions with individuals about their financial and estate planning
- Has credibility and a perception of integrity amongst the parish at large
- Who has the time available to devote up to five to ten hours per month
- Who is a good team player and has a good working relationship with the rector
- Who is a person of patience, as Planned Giving programs take time to bear fruit
- Has some degree of financial and marketing acumen, though this does not require a major facility in this area.
- Who is not afraid to discuss death in a sensitive and pastoral manner with donors

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