

Parish Stewardship Best Practices Evaluation



“And God is able to bless you abundantly, so that in all things at all times, having all that you need, you will abound in every good work.” (2 Corinthians 9:8)

Stewardship Development
Diocese of Toronto
March 2018



Parish Stewardship Best Practices Evaluation

Why Practice Stewardship?

Our understanding of stewardship as a way of life is based in scripture. The first chapter of Genesis tells us that God created all things, and created us to be the stewards of all creation. Being good stewards involves protecting our environment, as well as being concerned about the welfare of our fellow human beings. As stewards, we recognise that everything we have is a gift from God. We are responsible to tend our gifts, to nurture them and then to share their abundance with all.

“We need to get our priorities straight and be faithful to what has been entrusted to us. We are to make sure that wealth and material possessions always remain a means of serving God and never become ends in themselves.” (The Rev. Dr. John H. Westerhoof, “Grateful and Generous Hearts,” 1997)

The Reverend Dr. John H. Westerhoff, a noted scholar and priest from Atlanta, writes: “stewardship is the way to spiritual health and maturity, but for stewardship to have a chance we must begin with a serious spiritual question: What do we owe to God for the free gift of life and its accompanying benefits? The answer, of course, is everything.”

To be true stewards we must gladly share with others our time, our talent and our treasure. The lesson of scripture is not to be viewed in isolation from our daily lives. Scripture provides a real and complete guideline to living our daily lives as followers of Jesus Christ, “Love the Lord your God with all your heart, with all your soul, with all your mind and with all your strength and you shall love your neighbour as yourself” (Mark 12:30-31).

Christ’s teachings and life are our model for stewardship “It was for this that God called you, for Christ himself suffered for you and left you an example, so that you would follow in his steps” (1Peter 2:21). Embracing a life of Christian stewardship is the way we offer thanks to God for what God is already doing for us.

Our Baptismal Covenant

The practice of stewardship manifests itself in our daily lives through the Baptismal Covenant. In the Rite of Baptism, we profess our faith and reply affirmatively to the following statements:

- Will you continue in the apostles’ teaching and fellowship, in the breaking of bread, and in the prayers?
- Will you persevere in resisting evil and, whenever you fall into sin, repent and return to the Lord?
- Will you proclaim by word and example the good news of God in Christ?
- Will you seek and serve Christ in all persons, loving your neighbour as yourself?
- Will you strive for justice and peace among all people, and respect the dignity of every human being?

(Book of Alternative Services, p. 159)

The commitment we make at Baptism is not merely a statement of belief but is also a call to action. It recalls the teaching: “suppose there are brothers or sisters who need clothes and don’t have enough to eat. What good is there in your saying to them, ‘God bless you! Keep warm and eat well!’

– if you don't give them the necessities of life? So it is with faith: if it is alone and includes no actions, then it is dead" (James 2:15-17).

In the breaking of bread and sharing of fellowship with one another we recognise the temporal needs of our faith community. Our response is to ensure that our parish has the human and financial resources necessary to support vibrant ministry – ensuring a sound physical structure, strong and capable volunteer leadership, outreach programs, Christian education, hospitality, youth ministry and music – in addition to providing all parish staff, including clergy, with equitable and fair compensation for their work. The practice and teaching of stewardship education becomes vital to help us understand why we give joyfully.

We resist evil by inclining our hearts to follow God's commandments and to be examples of Christ in our world today. In thought, word and action we seek justice, practice tolerance and celebrate the diversity that is found within our church and society. It means reaching out to those who are different to us and making them feel welcome at the table of Christ.

The good news as found in Holy Scripture guides and nourishes us on our faith journey. The way we live gives testimony to our belief that our God is a God of salvation and mercy. We are mindful of the need to feed the hungry, give drink to those who thirst, welcome the stranger, clothe the naked, care for the sick and visit those imprisoned (Matthew 26: 35-36). As stewards, we live to give hope to others.

Loving our neighbour as ourselves acknowledges that we have a responsibility beyond our own interests. In his Sermon on the Mount, Jesus challenges his followers to become "other" centred. We are a Christian community endowed with many wonderful blessings. In gratitude, our faith obliges us to share what we have received with those less fortunate and those on the margins of society.

As we strive for justice and peace among all peoples we seek to create the world as Christ himself envisioned it: a world where people freely give without expecting in return and give in abundance because of the joy that is experienced in giving. In living the life of a joyful steward, we can then proclaim that "there is more happiness in giving than in receiving" (Acts 20:35).

Stewardship as an Expression of Faith

Practicing stewardship intimately ties us to who we are as a Christian people. Stewardship is an expression of faith. It is not simply the church's way of raising money; rather, it is a spiritual discipline that encompasses our very being as Christians. It is a radical departure from our secular understanding of charity where we give to an external need. Instead, as stewards, we are motivated to give because it is something we internally need to do; it is intrinsic to our very understanding of what it means to be fully human. Giving is not predicated on a certain act, nor is it something we do just because it is convenient. Our vocation as a Christian is that we give freely and in great generosity "for God loves a cheerful giver" (2Corinthians 9:7). Recognising that God actually gave us everything we have in trust, we, in turn, share the gifts that we have been given.

The Benefit of the Stewardship Best Practices Evaluation

Best practices are guidelines. They allow us to assess our successes and our shortcomings. In stewardship we use statistics from our church-warden's returns each year to evaluate overall trends in the diocese and to forecast outcomes years into the future.

Over the past ten years we have carefully analyzed giving patterns in the diocese. The result has been the identification of fourteen specific variables that give staff and volunteers the tools to evaluate individual parish outcomes. These variables give a snapshot of financial, congregational, ministry and leadership health. Taken they provide an opportunity to consult with parishes about what steps might be taken to initiate stewardship education and revenue development.

The fourteen best-practices are:

- We are a Christ-centred parish focused on disciple-making
- Parish has an active stewardship committee
- Parish clergy committed to stewardship education
- Parish conducts an annual joyful giving pledge campaign
- Through time and talent, full congregational participation is encouraged
- At least 4 sermons/year are presented on stewardship themes
- Development of annual narrative budget
- Distribution of proportionate giving work-sheet to all identifiable givers
- Individual giving to parish above optimum level of \$1,750
- Forty percent of identifiable givers are on pre-authorized giving
- Seventy percent of operating revenue comes from free-will offerings
- Parish directs 10% of revenue to outreach (with 5% to FaithWorks)
- Parish has a new-member ministry/orientation program
- Legacy giving is promoted in the parish

It should be noted that very few parishes score well in all categories. Presently about a dozen parishes within the diocese of Toronto could be classified as excellent in most categories. Yet when parishes commit the time and energy required to develop stewardship education in their congregation, these goals are attainable.

The Evaluation

(Circle appropriate score and total when complete.)

1. We Are a Christ-Centred Parish Focused on Disciple-Making					
Making disciples is the focus of everything we do: worship, gospel focused preaching, prayer, numerous bible study opportunities, annual ALPHA program, engagement with young people in worship and ministry, modelling Christ in our daily lives	4				
We are making significant headway: we do more than the occasional bible study but we are a ways from full engagement		3			
Good Eucharistic celebrations, an occasional bible study and we open each meeting with prayer			2		
Sunday Eucharist is held, but that's about it				1	
More people attend coffee hour than church services					0

It is no surprise that being Christ-centred in our life as disciples must be the top priority in stewardship education. Without a solid understanding of what it means to be a Christian – and the associated responsibilities – efforts to promote stewardship will flounder. Church members need to know why the church exists and what it endeavors to do. We cannot be a country club where people show up to socialize and simply engage in the practice of church by rote.

Twenty-five percent of the parishes in the Diocese of Toronto are experiencing growth in attendance, number of givers or both. That means that 51 parishes are doing something that is setting them apart from the others.

Canon Harold Percy (now retired from Trinity Anglican Church in Streetsville) notes in his book Your Church Can Thrive that “the failure to make disciple-making a priority is the basic cause of our current malaise and stagnation.” He contends that churches need to teach the gospel, teach people how to pray, read scripture, forgive, worship, give generously, model Christ in their lives and give witness to the work of the Holy Spirit.

Parishes that are succeeding at doing precisely what Percy recommends. Consistently it has been shown that parishes on a trajectory of growth make Christ the centre of everything they do. These parishes stand for something; they have a clear mission statement; they engage in long-range planning; they are focused on a world beyond their church walls; and, they believe in what they are doing. Exceptional generosity is an outcome of a parish environment focused on making disciples.

2. We Have an Active Parish Stewardship Committee					
Strong lay leadership & developing innovative programs annually	4				
We have an active committee		3			
We have a committee but it needs some focus			2		
There is interest but no leadership				1	
We are burned out and have no volunteers					0

The Parish Stewardship Committee is responsible for the planning, review and execution of the annual plan for stewardship education and development (Growing Stewardship Disciples). The objectives of that plan include: the introduction of a broader and deeper understanding of Christian Stewardship, to offer guidance for the implementation of that understanding, to emphasize that Christian Stewardship is a matter of concern throughout the year and to monitor and evaluate progress against identified best practices. Comprised of a Chair, Vice Chair, Secretary, Information Coordinator, Arrangements Coordinator and Commitment Coordinator, the committee maintains a regular meeting schedule to monitor the program through the year.

At the very least, every parish should have a stewardship committee tasked with organizing an annual joyful giving pledge drive. In their absence, two or three people should be able to put things together. All you really need is someone to ensure that bulletin announcements are submitted to the office secretary in appropriate time, correspondence is appropriately assembled and posted and someone (a husband and wife team if you like) from the congregation who has been identified to present a lay witness talk.

Desirable stewardship committee candidates are “doers” who like to finish what they start. They are respected by their fellow parishioners as good stewards. They should also be people of vision capable of sharing a common dream and working with others. Above all, they should be people of prayer who are unshakable in their faith and dedicated disciples of Jesus Christ.

3. Parish Clergy are Committed to Stewardship Education					
Priest is biggest booster and leads by example	4				
Ensures that stewardship has a profile & committee		3			
Clergy don't impede, but could do more			2		
Stewardship is the Church Warden's responsibility				1	
It would never fly here, so why bother					0

Each incumbent should strive to give a stewardship themed sermon at least once every three months. This will help orient the parish into thinking about giving as a year-round effort and will mitigate criticism that stewardship is only equated with money. Incumbents need not speak directly about money either. Practically every Gospel message speaks about sharing and generous living.

The Incumbent also needs to do more than just offer tacit consent to parish stewardship education. They should play an intricate role in identifying members of the committee and moving things forward especially in the initial stages. They should avail themselves at meetings and be prepared to offer a theological perspective on the importance of stewardship in everyday life.

The Incumbent should also lead by example. While it is generally expected that the Incumbent play a vital role in the life of the parish, he/she should be among its best proportionate givers as well. It isn't sufficient to say that because one gives their life to God they shouldn't give their money. Giving all that we have as a measure of our stewardship means precisely that, and this includes our money as well.

4. Annual Joyful Giving Pledge Campaign					
Annually, and we do a visitation too	4				
Annually without fail		3			
About once every 2 or 3 years			2		
We tried that before				1	
Not worth the effort					0

A visiting, or calling effort, by its very nature, demonstrates that there is commitment on the part of all the workers. Calling on every parish member (except those who really don't want it), not just those who are late in getting their cards back, is important. Calling on habitual non-givers and non-attendees will sometimes touch such people, with effects that may either be prompt, or take years to surface. Put differently, it is missing the point to try to minimize the effort.

A variation on the visitation theme (that I highly recommend trying) is the relay where members of the congregation pass a package of stewardship information and commitment cards along a route of eight to ten households. The great benefit of this approach is that personal contact is high and yet it requires very little volunteer time and training. The parish of St. John the Evangelist, Peterborough has used this model of stewardship education for several years and their former incumbent, the Rev. Canon Gordon Finney, says it is a fun and easy to plan way of increasing the response rate that we usually experience with a letter only appeal.

5. Time and Talent Pledge					
We faithfully seek a pledge annually, and then get active	4				
We encourage all our members to get involved		3			
It's a good idea, but money is our top priority			2		
We thought of that of doing that – about 5 years ago				1	
People are burned out here; there is no sense in asking					0

All too frequently we think of stewardship as synonymous with the gift of treasure. My phone does not ring because the parish priest is having trouble recruiting choristers but because the church offertory is declining. Most of my time is spent resourcing parishes on how to encourage financial giving that is proportional, generous, consistent and joyful. Without a doubt all this is necessary to secure the temporal ministry needs of our churches. However, imagine what our parish experience might be like if everyone in the congregation was encouraged to get involved in some capacity.

Here's an interesting idea. What if we encouraged people to tithe their time? In all my conversations and presentations on stewardship I cannot think of a single occasion when I challenged someone to tithe their time. Yet I know from experience that those parishes that encourage members to involve themselves at a heightened level of ministry and community service tend to experience very generous levels of financial giving. The relationship is clear; people give most generously to the causes they are intimately involved with.

Regardless of personal economic situation, we all have the same amount of time. We all have the capacity within our daily routine to dedicate our time to serving God and the people of God in the world.

6. At Least 4 Sermons/Year on Stewardship Themes (e.g. outreach, activism, giving, TTT)					
More than 4 sermons	4				
4 sermons		3			
1 or 2 good ones each year			2		
Maybe... once every couple of years				1	
I will never talk about money					0

One of the most important parts of joyful giving is the stories and testimonials delivered to the entire congregation by individuals whose lives have changed as a result – made by clergy and lay people. Lay witnesses are necessary to the success of the parish effort. There are many reasons for this. Learning to be a generous giver is a part of the internal change of heart, or conversion process, we know so well from the Scriptures. The Old and New Testament are full of stories of real people who became aware of the need to put their faith into action.

Lay witnesses send a strong message to the faithful about giving of one's-self for what God has given them. Christians throughout history have been raised to a new level of awareness by hearing how a deeper sense of spirituality has taken over the lives of people just like them.

The lay witnesses should be individuals from the parish who believe and practice the concept of sacrificial giving, for example, those who give of their time, talent and treasure in an intentional, planned and proportionate way. They should be individuals who can relate well to other parishioners, feel comfortable speaking to a group about their firsthand experiences, and who will be enthusiastic about their mission.

7. Development of Annual Narrative Budget					
Annually, and with updates during the year	4				
Annually		3			
About once every 2 or 3 years			2		
The past decade but not sure when				1	
It's too much of an effort					0

The vestry and stewardship committee need an effective tool for showing church members how their giving supports mission. Too often, they have only the church's line-item budget to use for this purpose. Although a line-item budget keeps track of church income and expenses, it reveals little about how a congregation's mission is funded. However, a narrative budget shows the purposes and goals of the congregation and focuses attention on mission and ministry.

A narrative budget shows what ministries were supported by the previous year's offerings and shows how the vestry is budgeting resources to carry out the congregation's mission. It helps the vestry demonstrate its accountability to the rest of the membership so that its accountability inspires trust, and trust inspires commitment. When church members see that the ministries they make possible are continuing Christ's work in the world, offerings increase.

Also, the narrative budget reminds the congregation that the church's leaders manage the ministry resources. For example, some expenditures in church budgets – such as salaries and utilities – are commonly considered fixed, contracted expenses. Sometimes, the congregation sees these so-called

fixed expenditures in the line-item budget as overhead expenses and identifies “real” ministries with expenditures for church school supplies and various social programmes. The narrative budget clarifies that every budget expenditure affects ministry. The people give offerings to support the ministries of the church. Thus, each ministry carries out the overall mission of the church.

8. Distribution of Proportionate Giving Work-sheet					
Annually and we encourage a 1% increase by all givers	4				
Annually		3			
About Once every 2 or 3 years			2		
We ask for increases but don't give a guideline for giving				1	
What's proportionate giving?					0

Proportionate giving means that shares of our personal resources of time, talent and treasure are being devoted to the Lord's work on a regular schedule. It is a commitment made in response to the love which God has shown for us through His Son, Jesus Christ, as well as in the events of daily life. It is an offering of “ourselves, our souls and bodies.”

Proportionate Giving Worksheets have been found to be very helpful in assisting parishioners as they rethink the matters of proportionate giving and tithing.

The worksheet offers a means of determining one's present percentage level of pledged financial support for the local church and establishing a commitment for the coming year. It is not to be returned to the church. It is intended for personal use with prayerful consideration in the privacy of one's home.

How much should Christians give? Each Christian “should give, then, as they have decided, not with regret or out of a sense of duty; for God loves a cheerful giver” (2Corinthians 9:7). No set amount or percentage of income is dictated, rather, “if you are eager to give, God will accept your gift on the basis of what you have to give, not on what you don't have” (2Corinthians 8:12).

In summary, Christians should not subject themselves to the Old Testament law of the tithe. Instead, they should give according to the following New Testament guidelines. Christian giving should be:

- Proportional to one's income (1Corinthians 16:2; 2 Corinthians 8:12)
- Consistent (1Corinthians 16:2)
- Sacrificial (Mark 12:43-44; 2Corinthians 8:2-3)
- Cheerful (2Corinthians 9:7)

Christians should live their lives open-handed – acknowledging that they are merely stewards of God's possessions. They should always be willing to give 100% of that which they steward at any time required by the Lord (Matthew 19:21). Indeed, they should even be willing to offer their very “bodies as living sacrifices, holy and pleasing to God” (Romans 12:1).

9. Individual giving to parish above optimum level of \$1,750					
Significantly above optimum level (\$1,900+)	4				
Within optimum level by \$100 either way (\$1,650-\$1,850)		3			
About $\frac{3}{4}$ of the optimum level (\$1350)			2		
Half that amount (\$900)				1	
Well below optimum level (less than \$700)					0

The diocesan average is only a barometre with respect to how individuals within a parish are performing compared to other parishes. However aggregate giving is a poor indicator of generosity because many high-income donors give well above the diocesan average but the proportion of their giving is relatively small.

We have found that parishes need to strive for an average annual gift of about \$1,750 to remain healthy. This figure represents optimum giving; a level of support consistently found in our most successful parishes. Those parishes – both urban and rural – who have a variety of relevant ministry opportunities, experience numeric growth in the number of worshipping members, offer meaningful worship and are present to the missional needs of their communities have a level of giving that is consistently above average.

Optimum giving leads to sustained and innovative ministry which empowers an enthusiastic base of volunteers who are committed to missional outreach and a welcoming spirit of hospitality. This leads to numeric growth in the congregation who experience a rootedness in parish life and, in turn, they become generous and joyful givers. This paradigm of growth is the foundation for the Growing Healthy Stewards program.

10. About 50% of Identifiable Givers are on PAG					
Over 50% on PAG	4				
40% - 49% on PAG		3			
25% - 39% on PAG			2		
A handful are on it, though we've never really made a push				1	
We don't believe in that sort of thing around here					0

One of the principles of good financial stewardship involves planning the gifts that are to be shared. Implementing a PAG strategy in a parish is one profound way that parishioners can enact their financial stewardship plan each year. There are numerous benefits, including:

- For those who embrace stewardship as a way of life, PAG for the Sunday collections provide an opportunity to keep the Church a priority when it comes to sharing financial gifts.
- The more people that use PAG, the more reliable a parish's revenue stream will be from the weekly offertory.
- PAG is significantly more secure than cash gifts. When largely promoted, the use of PAG minimizes the physical cash on hand in the rectory/parish office.
- As more parishioners opt for PAG, data entry by parishes for the regular collections will be less time consuming.

- PAG ensures that the parish regularly receives the intended gift as by the parishioner.

There is a tremendous opportunity to move forward with PAG in a more determined and systematic way. This is even more evident given current levels of giving in the diocese of Toronto. Presently the average annual gift through free-will offerings is \$1,284 (2015). However, when we control these donations for those who give through PAG we find that average giving increases to \$1,800 (2015).

Not only is PAG good stewardship but it is an effective tool in streamlining parish record-keeping and reducing workloads. With a normal offertory program, the envelope secretary must input data on a weekly basis. With PAG however, the envelope secretary need only input data once per year and thereafter only to update or delete information. On a per donor basis, the workload is reduced significantly.

11. 70% of Operating Revenue Through Offertory					
Over 71% through offertory	4				
70% through offertory		3			
50% - 69% through offertory			2		
Less than 50% through offertory				1	
If we lost the daycare we'd be toast					0

As a guideline for giving it is strongly recommended that parishes aim for free-will offerings more than 70%. This put the burden of parish ministry in the hands of parishioners themselves. It intimately connects our volunteers and parish leaders to the stewardship process.

Parishes that rely heavily on rental income operate at their own peril. Were a tenant to leave suddenly or default on payment the church may not have any recourse. In addition, the absence of a consistent reliable stream of revenue might undermine current and future ministry opportunities. In this way parishes do not control their own destiny. At the same time, the renting of space invariably ties up program space, thus limiting what activities parishes might engage in.

With a base of 70% of revenue from parishioners, leaders and clergy can adequately plan their programs with confidence; that they "own" them and have the financial resources to sustain them. Reliance on one's own ability strongly aids the stewardship process as parishioners are challenged to meet the operating budget of their parish. This is a strong statement about one's own level of generosity.

12. Parish Directs 10% of Revenue to Outreach					
We give more that 10%	4				
10% is built into the parish budget (& FaithWorks gets 5%)		3			
6%-9% is directed to outreach			2		
About 1%-5% is directed to outreach				1	
Humbug, charity begins at home					0

Just as we encourage proportionate giving by members of our congregation, so too do we as a parish give proportionately. Tithing has long been considered the gold standard of giving. And while many

today maintain that it is an unachievable standard, it remains nevertheless a measure of generosity that is admired and yearned for by many.

It is precisely because it is such a challenge that parishes should lead by example and endeavour to donate 10% of their revenue to outreach, including 5% to FaithWorks. By donating funds to other projects in our community and beyond we are setting a very powerful example for others: that the gifts that we have from within our congregations should be shared beyond our walls.

While parish-identified outreach projects are important, as Anglicans, have a shared commitment to the outreach that we as a diocesan family have chosen to support through FaithWorks. In supporting FaithWorks we are demonstrating our commitment to a fundamental diocesan program aimed at assisting those most in need in our very midst.

To be true stewards we must gladly share with others our time, our talent and our treasure without ceasing. The lesson of scripture is not to be viewed in isolation from our daily lives. Instead, the teaching provides a real and complete guideline for our relationship with Christ and how we are to live our lives as His followers. The Great Commandment makes clear what we must do: “Love the Lord your God with all your heart, with all your soul, with all your mind and with all your strength” (Mark 12:30). And the second is like unto this: “you shall love your neighbour as yourself” (v.31).

Giving away 10% might be viewed as real hardship for some parishes but it demonstrates our profound trust in God that He will provide. Parishes that practice stewardship in its fullness cannot help but want to tithe.

13. Parish Has New-Member Ministry/Orientation					
We host a luncheon and try and integrate newcomers	4				
We distribute a welcoming package to all newcomers		3			
There is value in this ministry we just lack the volunteers/time			2		
Our sides-people greet everyone at the door				1	
Newcomers would adversely affect our sense of community					0

Every congregation thinks of itself as welcoming. But is it, really? Most congregations are intimate communities of individuals who have come to love each other through good times and bad. These close ties are an essential extension of God’s love, but if they are not carefully managed they can exclude others from full incorporation into the Body of Christ. It is always difficult to assess the spirit of hospitality accurately from the inside.

Action Steps...

- Check signs, church location, and entrances. Walk around the property and look at the grounds, buildings, parking lots, and driveways.
- Welcoming churches have developed the ministry of the Greeter which partners with the Sides person. How are your greeters trained for their ministry, and are they supervised? How do they welcome new people into the worship experience? Do they keep an eye on new members during the service and contact them after the service?

- Assess who is drawn to your community and who tends to stay. Develop a basic tracking system so that you have some idea of how many new people visit your parish and how often.
- Evaluate how user-friendly your services are. Most seasoned Anglicans rest into the comfort of the worship service as if they were falling into a big fluffy pillow. However, new people find it embarrassing and awkward if they do not know which book to use, the correct page number, or whether to kneel or to stand.
- Contact some of the new visitors and listen to what they must say about their church experience. You may want to use questionnaires, focus groups, or visitor's forms.

Growing churches invite visitors and seekers to enter a journey of faith in the local expression of the Body of Christ. To achieve this, they have intentionally focused on every point of entry into the life of the church. A welcoming church, however, does more than simply attract new people. It works toward retaining those new members by nurturing their spiritual journey.

14. Legacy Giving Promoted in Parish					
We have a Legacy Giving Sunday and promote bequests	4				
We have a parish brochure		3			
We have the enthusiasm but lack the leadership			2		
We get gifts periodically but haven't encouraged it				1	
What's a will?					0

Legacy giving is the process of choosing gifts with an eye to realizing the donor's philanthropic objectives while maximizing the financial benefits. These financial benefits come largely from the treatment of charitable giving in the Income Tax Act.

Many of the gift vehicles commonly used in planned giving have been available for many years and are quite familiar to most people. Bequests, trusts, life insurance and annuities have been used to make charitable gifts for decades, in some cases centuries.

Despite this fact, legacy giving is not a well-established tradition throughout the Anglican Diocese of Toronto. With some notable exceptions, most congregations have little experience with their members making such gifts on a wide scale.

Legacy giving is a form of financial stewardship. Most of our members know stewardship through their regular offerings. Compared to Sunday offerings, legacy gifts:

- are made much less frequently, usually only once or twice in a donor's lifetime;
- come from accumulated financial assets, as opposed to income;
- are significantly larger in dollar value.

Legacy giving is a vital component in any charity's financial development strategy. Since the mid-1990s, virtually every significant charity in Canada has seen the wisdom in putting major resources into developing a sustainable legacy giving program. Starting a legacy giving program requires both commitment and patience. The experience of most charities is that it takes 5-7 years before the fruits of attention to planned giving begin to be noticed. During those early years there may be occasional

gifts, but they will be rare. It is the extra-ordinary organization or parish that displays the kind of patience and commitment to planned giving needed in the early years.

And the Results Are...

Total up your score and assess the result below

_____.

A (48-56) Excellent

- Christ-centred church focused on making disciples
- strong clerical leaders who are engaged in the life of the parish
- energetic and enthusiastic volunteers
- many opportunities for ministry involvement
- variety in Eucharistic celebrations
- clear vision statement
- outreach/in reach is very important, strong support for diocesan activities
- growing congregation with ministries serving diverse age groups
- welcoming parish – this is a place people want to be and feel at home
- givings are exceptional with funds invested and/or redirected to new ministry each year

B (38-47) Above Average

- Christian education is growing component of our ministry focus
- strong clerical leadership
- givings are good but people know they can do better
- lots of volunteer opportunities and many qualified leaders
- clear vision statement that is reassessed every 3-5 years
- very good outreach, dedicated support for FaithWorks
- diverse, growing congregation
- new member ministry programming
- supportive of PAG but need a bigger push
- may have done year-round stewardship education and at least do some sort of sacrificial giving campaign annually

C (24-37) Average

- eucharist is central to our ministry but there are few opportunities for additional engagement
- clerical enthusiasm but unsure of direction of parish
- dated mission statement
- some outreach, perhaps FaithWorks
- strong volunteers though in limited supply
- inclined toward growth but uncertainty about what that means
- diversity in ministry opportunities for volunteers, but frequently rotate the same people
- sporadic growth in congregation – probably a few more funerals than baptisms
- would like to do year-round stewardship but concerned about the reaction from the congregation (might anger some people)
- givings are barely sufficient to meet operations (and sometimes we must ask one of our top donors for a little Christmas gift, if you know what I mean)

D (13-23) Below Average

- Sunday eucharist is the only form of Christian engagement in our parish
- limited clerical support (part-time in parish)
- conflicted vision between lay people and clergy
- over-extended volunteers
- static growth in congregation
- very limited outreach activity
- on the cusp of failing without some sort of transition
- givings are insufficient to meet operations and parish typically dips into reserve funds to meet expenses at end of the year
- potential for growth exists with the right leaders

F (0-12) Unsustainable/Impoverished

- attendance is by rote and the Christian experience is very limited
- limited clerical support (less than part-time in parish)
- over-extended/burned out volunteer base
- rapidly shrinking congregation
- large majority of the congregation is retired
- preoccupation with reminiscing about days gone by
- virtually no outreach
- marginal fellowship
- parish is lucky the doors are open on Sunday
- givings are well below average and people feel tapped out

Action Steps...