

ASSESSING YOUR GIFT PLANNING PROGRAM



It is a good idea to regularly assess how a parish gift planning program is doing to determine how effective it is. 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, mission statement?
2. Does the parish Rector actively share the parish vision and communicate the importance of the gift planning program in the parish community?
3. Is there a dedicated gift planning team in place?
4. Does the Gift Planning Team work in partnership with the Stewardship Team? Describe how that happens.
5. Is the church leadership including the priest(s), wardens and parish council 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 gift planning 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 to the Gift Planning Team and donors?
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 gift planning brochures, put reminders in the bulletin; invite guest speakers; encourage personal testimony from people who have made a gift; invite diocesan support and assistance?
10. Does the gift planning program have goals? Is there a written plan to support working towards and achieving them?

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11. Does the parish have a Gift Acceptance Policy that sets out the types of gifts the parish is prepared to receive?
12. Is there a plan for celebration? Does the team let the congregation know that a gift has been received? Is there an event each year to celebrate successes, to give thanks, and share the joy of how planned gifts will benefit your parish?
13. The success of your gift planning program starts with you. Lead by example. Do you have a current Will? 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 Gift Planning to ask for help? His contact information is as follows:

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Director of Stewardship & Gift Planning
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Vancouver, BC V6H 2E2

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