

CRITICAL MISSION: Leading and Stewarding for a Ministry's Future

The ride up the ski-lift provides an awe-inspiring view of God's creation that calms the soul from everything else going on in the world. After getting off the lift smoothly, the skier positions him/herself onto the top of the run. The sunblock is applied. The goggles are placed in position. One last check of the boots being snapped in place is done. All other critical equipment is double-checked. Coat pockets are zipped into place. All is ready. It is now time as the skier looks down the slope and plans the first moves to successfully maneuver down the mountain, even though the bottom is not in sight. Possibly, a brief silent pep-talk is done internally. The skiing then begins in a moment of exhilaration and accelerating speed.

Skiing down a mountain for the very first time may be a similar experience for some churches and other ministries considering establishing a gift planning program for the very first time. Leaders may feel that they are doing so somewhat blindly because they cannot see the bottom of the mountain, but only see a few feet in front of them at a time. However, pursuing a gift planning program is a critical mission that should be undertaken for the sake of leading and stewarding a ministry organization to have maximum impact for the Kingdom.

A gift planning program helps ministry constituents plan estate and lifetime gifts as well as other special non-cash gifts to invest in Kingdom-efforts for the sake of perpetual impact. Gift planning is a critical stewardship area that leaders should be aware of, plan to execute a gift planning program, and continually engage their organizations in every way possible. This helps to further impact the underlying ministries they lead.

For some ministries, gift planning has been a very effective development effort for many decades. For others, the beginning steps are being considered. For the latter, the following are some steps that should help move the effort forward for the sake of one's ministry efforts and the lives that it desires to impact:



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- 1. Begin with specific objectives in mind:** These objectives do not necessarily involve dollar amounts expected for special gifts. Objectives should include a long-term approach at engaging constituents about gift planning opportunities in one's ministry organization. As Kathryn Myree reminds us in her article, "The Role of Gift Planning in Major Gifts," "Planned gifts are generally the result of an ongoing relationship between the nonprofit and the donor." The development of these ongoing relationships is long-term in nature and often has some of the greatest impact upon the life of a ministry organization in respect to funding. These relationships are very much worth investing the resources of an organization. They also help donors themselves leave legacies for the ministries that they desire to impact.
- 2. Decide the gift planning program coordinator:** The question must be addressed of who will be leading up the gift planning program. In a very small organization, this individual may even be the Executive Director who is also leading all of the development efforts. For churches, this may be the Finance/Stewardship Team, Executive Pastor, Business Administrator, or other individual. For other organizations, the designated gift planning coordinator will likely be an individual solely dedicated to gift planning.
- 3. Engage the services of marketing and technology in gift planning organization:** Whoever will be leading the gift planning efforts for the ministry organization needs to be the key decision maker in this step. An organization will need to be pursued that can help provide support for the marketing infrastructure and technology for gift planning illustrations. This needs to be a very experienced firm in the gift planning arena that understands the context of ministry. A denominational based foundation, like



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the Louisiana Baptist Foundation, can provide this marketing and technological assistance often at no charge.

4. Develop a relationship with a gift planning back-office organization:

With specific gift plannings (i.e., charitable gift annuities and charitable trusts), a back-office organization managing these on behalf of the ministry is the better solution overall. It simply does not make sense to take on the back-office work for various reasons. A denominational based foundation, like the Louisiana Baptist Foundation, can provide these back-office services, often at no charge.

5. Develop and launch a strategic consistent communication plan to

constituents: The marketing and technology consultant (referenced in step #3) should be able to help with this step related to customized electronic and hard-copy materials. They may also assist with overall communication plans that best align with the gift planning expertise level of the program coordinator. These efforts should be consistent with a long-term commitment in educating constituents on gift planning opportunities. These communication efforts are a long-term investment that can have very significant future results upon the life of a ministry. Research performed by Dr. Russell James (www.encouragegenerosity.com) has also shown that individuals who commit to gift plannings may also increase their current giving that will provide short-term results for the organization as well.

As a ministry leader looks down the ski slope and approaches the exhilarating run of gift planning in their own church and/or other ministry, the above steps may be helpful in providing a manageable process for reaching the bottom of the mountain with utmost success! Gift planning has been and will continue to be a





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very critical area of funding for God's work in the coming years for the sake of the lives that will be impacted by our various ministry organizations.

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The Louisiana Baptist Foundation provides services and consultation related to this material.

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