

Benefits of a Parish Endowment Program

1. Can generate the largest gift a parishioner will ever make to their church
2. Introduces eschatological reflection into lives of parishioners
3. Provides stability for parish in periods of economic uncertainty
4. Allows a parish council to focus on long term objectives rather than daily concern with “paying bills”
5. Creates the gift that keeps on giving
6. May fund activity not ordinarily found in the operating budget —mission, service to the poor, scholarships, a designated youth minister, etc
7. Realizes dreams long precious to a parishioner and a parish
8. Offers variety of means for parishioners to participate in the program
9. Oftentimes provides the critical seed money for property acquisition, capital expansion, renovations or beautification programs
10. May offer tax advantages
11. People can give from three sources— 1) annual income (for stewardship), 2) appreciated assets (for capital campaigns) and 3) estates (for endowments).

The Services of Stewardship Advocates

Campaign Planning Studies
Capital Campaigns
The Sacrament of Stewardship
Annual Giving and Stewardship
Special Campaigns
Major Gifts
Strategic Planning
Endowments
Board Development
The Parish Philanthropic Audit
Board Retreats
Leadership Coaching
Evangelization and Church Growth
Volunteer Management
The Parish Stewardship Weekend

Stewardship Advocates

2753 Broadway #153
New York, NY 10025

212.316.3525 Land
347.831.1848 Cell

FrScottSA@aol.com

www.StewardshipAdvocates.org

**“Well done good and
faithful servant.”**

The Parish Endowment Program



Stewardship Advocates

Helping Parishes to Fulfill Their Mission



Fr. Anthony Scott is a priest of 32 years' experience including 18 years of full-time national and international fund raising experience in the Orthodox milieu. He is professionally trained in all aspects of *nonprofit institutional development*, having completed over 30 courses of study. In the past six years he served 75 Orthodox institutions in all jurisdictions—metropolises, dioceses, parishes, seminaries, missions, schools, organizations, humanitarian agencies, numerous SCOBA-sponsored charities, foundations, trusts, etc.

He is the editor of Good and Faithful Servant: Stewardship in the Orthodox Church, published by SVS Press in 2003. He is the publisher of "Orthodox Philanthropy", an occasional newsletter on best practices of Orthodox parish development and fund raising.

Fr. Anthony holds an bachelor's degree in English Literature from the University of California at Berkeley and a Master of Divinity degree from St. Vladimir's Seminary where he also served as Chief Advancement Officer for 12 years. During that time he directed a \$22 million capital campaign. All told, Fr. Scott has raised \$80-\$90 million in the Church.

He is the author of numerous articles on stewardship, strategic planning, board development, annual giving, etc. The story of his pilgrimage into Orthodoxy was published by Light and Life Press in the book, Journeys to Orthodoxy, ed. Thomas Doulis.



The Parish Endowment Program

Increasingly, more and more Orthodox parishes are developing endowment programs. A significant number of Orthodox parishes now have endowments of \$3-5 million. Yet endowments can also pose a threat to the long term well being of a parish. If improperly framed, they function as subtle sedatives, putting to sleep volunteerism and sacrificial annual giving or stewardship. Hefty endowments may also tempt parishes to institutional arrogance and insularity. However, many parishes and organizations do prosper and grow in healthy ways through the unique benefits of an endowment. The challenge is to do this in the best possible manner.

The Service

- 1) A parish endowment program is analogous to a capital campaign. It begins by defining the goals and objectives of a prospective new or enhanced endowment program.
- 2) Through personal interviews of affluent and influential parishioners, the consultant ascertains the readiness of a parish to undertake an endowment campaign or program, identifies key leadership going forward and determines a realistic goal.
- 3) From the gathered information, an Endowment Committee is formed (allow the consultant to have input as to its composition); goals and objectives are determined; and the plan to create or enhance the endowment is produced.
- 4) The goal of the campaign is not necessarily to raise *present* gifts but rather to receive *commitments* for planned gifts—primarily bequests, trusts and life insurance. The ideal time to speak to parishioners regarding a planned gift commitment is not when they are living in assisted care and have already completed their estate plans, but rather, when they are *forming*

their estate plans.

- 5) The consultant assists with the production of planned giving materials and assists in "chartering" a legacy society within the parish.
- 6) Working with the parish priest and the leading members of the laity, the consultant coaches the team in the proper, dignified and effective method of visiting with prospective endowment participants inviting them to enroll in the program. When appropriate, the consultant accompanies the priest and lay leadership in visitations.
- 7) For a period of 30 days following the last visit of the consultant, he is available by phone, fax and email for ongoing support.

Frequently Asked Questions

Q: What is the cost of the service?

A: Fund raising consultants universally condemn as unethical the practice of compensation as a percent of what is raised. The service is offered at a flat rate, plus expenses. Expenses typically include, air travel, accommodations, car rental, meals, printing, etc. Contact Fr. Anthony for a written proposal.

Q: How do we convince decision makers in the community that this is necessary?

A: Invite Fr. Anthony to come one evening to present the service to the leadership of the parish. There is no fee or cost for the visit. Fr. Anthony introduces himself, makes a brief PowerPoint presentation, provides referrals if requested and answers questions. It is respectfully requested that the meeting has a single-item agenda and is not squeezed into a parish council meeting.

Q: What is the responsibility of the parish?

A: Provide on-the-ground organizational and secretarial support for the program, ensure the availability of the priest and follow through on tasks.