

Narrator: We are going to role play a visit to ask for a planned gift. David will be the prospect. He is a married man with adult children. His spouse is imagined to be present, but will not participate in this simplified scenario. Lee is going to be the lead “ask-er.” She serves on the planned giving committee of the church and has made a planned gift. Mary is the “wingman,” chosen because she has also made a planned gift to the church and has a connection to David as a long-time member of the church. In fact, they have been on a mission trip together. A pastor could play either of these roles. One advantage of bringing two people is that one can carefully listen and observe while the other is talking. Lee set up the meeting by talking to David and his spouse after church one Sunday, specifically saying that she was a member of the planned giving committee and wanted to talk about the financial future of the church. Lee and Mary have met ahead of time to discuss what they know about David and his spouse and what the best approach might be. They plan on meeting for 30 to 45 minutes.

Lee: Thank you so much for spending time with us this evening. The painting over your fireplace is lovely. I imagine it has some special meaning to you.

David: Yes, it is a watercolor my Aunt did of my grandparent’s home. I have so many great memories of family gatherings there. I inherited it when my Aunt passed away.

Mary: Families are so important. It is just about the only thing I can think of that I would say is more important to me than our church. You know, the two things are related – strong families make for strong churches and strong churches make for strong families.

David: I always went to the Christmas Eve service with my grandparents and parents. I cherish the memories.

Narrator: Your meeting will start with some social time. Perhaps you will be offered coffee and cookies. You are not strangers to each other and you want to make a social connection. Look for clues that will enhance what you already know about the prospects. Mary picked up on the importance of family and connected it to church.

Lee: We’d like to talk with you tonight about making a planned gift to the church. These gifts will help us to live the love and justice of Jesus in the future and will help expand our mission and ministry beyond what can be accomplished with future member giving.

Narrator: Lee is going to use the case statement to highlight the importance and impact of a gift. This will take a few minutes, but should not take much longer.

Mary: Lee and I have both made planned gifts to our church. After my children were grown, we re-did our will to support a number of charities and none are more important to us than our church. It gives us great satisfaction to think about the good this will do for the church and the world. We think about the Barclay endowment at our church and how it has supported youth programming and mission trips. We may not be able to give as much as the Barclays, but we know that our gift will make a difference.

Narrator: Mary is testifying about her own experience and also building on the mission trip connection.

Lee: Have you ever thought about making a planned gift to the church? Do you know about the different options for planned giving? We are not experts, but we know the basics and we know where to go for answers.

David: Have we thought about it? A little. We know we need to update our wills. Have we done anything about it yet? No. We haven't seemed to find the time.

Mary: We found that we had to give ourselves a deadline to make some choices about what we wanted to happen to our assets when we died. It was such a relief, though, when we got this taken care of. We talked to our children during the process and had some really good conversations that we might not have had. And now our children know what is most important to us – which includes them, of course!

Narrator: In a real encounter, the conversation about estate planning might expand to include pointing David towards resources about planned giving (maybe the church has a planned giving page on their website.). If Lee and Mary have had good experiences with estate planners or attorneys, they might share who they have worked with to help David move ahead. Moving right along:

Lee: David and Dena, we appreciate your steady and generous support of our church. We asked our financial secretary who she thought might be interested and able to make a planned gift and she said you would be near the top of the list. There are many options for giving: you might endow your pledge by making a gift of 25-times your annual pledge or you might add the same amount to the Barclay Fund. Which option is more intriguing to you or can you imagine another option that touches your hearts?

Narrator: Lee has made a specific ask and did not frame it as a yes/no question. After she made the ask, she stopped talking and started listening.

David: [silence]

Narrator: Wait for a response.

David: We'll have to think about this.

Narrator: "Maybe" is probably the most frequent response to an ask like this. Whatever the response is, even if you get a flat "no," you need to thank the person and make a follow up plan. If the answer is no, you may ask if "no" means "not now" or no means "never." Try to leave an opening for future conversations.

Lee: Thank you for hearing our invitation. Is there any specific information that will help you with your decision? When might we check in with you about this?

David: We would like to know more about how the endowed pledge would work. How would annual distributions work? And which would be better, an endowment gift or an outright gift with no strings attached.

Lee: I'll get our treasurer to answer your question about endowment spending. What's better is for you to decide. We're happy to talk more about the advantages and disadvantages of different kinds of gifts.

Mary: Thank you so much for meeting with us this evening. Whatever you decide, please know that you are beloved members of this congregation and will continue to be so. Our community is enriched in so many ways by both of you.

Narrator: Remember, we love people for who they are and not for what they have! The request for a planned gift is rooted in a shared passion for the mission and ministry of the congregation. After the meeting, Lee is going to follow up with a handwritten thank you note for the meeting that will also reiterate any follow up. Mary could also write a note. Lee and Mary should de-brief and plan for follow up. This should include letting the pastor know about the meeting and anything coming out of the conversation that the pastor needs to know.