



LOYAL MEMBERS ARE THE BEST PLANNED GIVING PROSPECTS

People often ask, “How can we predict who is likely to make a planned gift?” Recent research confirms what we intuitively know that ***“Loyalty is the best predictor of planned giving prospects.”*** By looking backwards at the giving and participation history of persons who made a bequest, we find that bequest donors have given at least ten and often fifteen times prior to their planned gift.

At the Diocesan level, we have identified our “loyal Bishop’s Annual Appeal” donors who have given in at least five consecutive years at a significant cumulative amount. We are phoning a segment of these donors to thank them. As appropriate, we gently suggest the idea of a gift from a will or trust.

Parish level “loyalty”

Your assessment of loyalty at the parish level is more complex; it is more intuition than science. We suggest looking at:

- consecutive year participation in your annual fund drive at a meaningful level
- age and family circumstances and trends (single and widowed donors, those without children)
- service on your Finance or Stewardship Councils or Planned Giving Committee
- participation in the life of the parish as lectors, communion ministers, and greeters.

Planned giving donors have a true stake in the success of your parish. Loyal members may not identify themselves financially, but by their activities. Persons who attend daily Mass are usually loyal, as are parishioners whose family roots run deep in the parish.

Communication

Once you have identified “loyal members,” how do you communicate with them? Transparency in the financial affairs of the parish is critical. Regular publication of the income and expenses is essential, together with a thoughtful, not necessarily elaborate, annual report of the financial and spiritual accomplishments of the parish. Communication should be open and honest about all facets of the parish so that parishioners develop an internal desire to support the parish’s long-term viability.

The real key to communicating with specific loyal parishioners is to be direct about the opportunity to make planned gifts. Face to face communication is the best. At some point, an estate planning seminar with time for Q and A can be very valuable.

Special Resources and a Challenge

We invite you to *identify at least three members of your parish who have distinguished themselves as “loyal.”* We are available to help you devise a strategy about how to approach them through your personal contacts or with a personal visit together with a representative of our office.