



DEVELOPMENT, PLANNED GIVING & STEWARDSHIP

INVESTING IN CONGREGATIONS

EXPANDING HORIZONS REPORT

- Innovation
- Compassion
- Transformation
- Ministry
- Investment



NET CAMPAIGN TOTALS

- Bishop's Phase \$13,312,597
- Congregations Share \$1,965,685
- Campaign Expenses \$3,632,711
- Total to Distribute **\$11,645,571**

Giving in 2021

- January 2021 EH Account Balance: \$2,700,000
- 2021 Cash receipts to EH Account (9/30/21) \$610,862
 - Our three largest gifts make their payments in the fourth quarter. We anticipate \$1,500,000 more in 2021
- We gave \$1,037,402 to congregations, diocesan institutions, and ministries in 2021



2021 EXPANDING HORIZONS DISTRIBUTIONS

As of January 1, 2021, Expanding Horizons had collected **\$2,704,583** for distribution.

Distributions made:

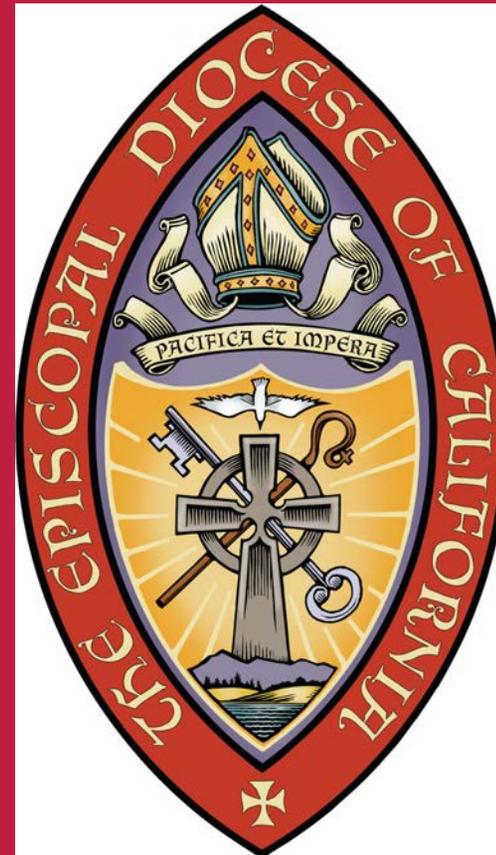
- \$20,000 St. Barnabas Agricultural School, Diocese of Haiti
- \$417,305 Episcopal Impact Fund
- \$125,087 The Bishop's Ranch
- \$375,000 St. Dorothy's Rest
- \$90,000 Brentwood Farm Church Missioner

For a total of **\$1,037,402** in allocations for 2021. The remaining balance will be reserved for future projects including:

- Vital & Thriving Curriculum and Grants
- Adapt & Nourish Ministry Incubation Fund
- Essential Housing projects across the diocese

DEVELOPMENT & PLANNED GIVING

- Stewardship
- Outreach
- Transformation
- Estate Giving
- Investments
- Capital





DEVELOPMENT

The Resurrection Fund Continues to make assistance available for Assessment Relief

In April, 2020, in response to the anticipated needs for emergency funding for diocesan institutions and congregations, we launched the *Resurrection Fund*. Through this initiative we asked a small number of heroic donors to make extraordinary gifts to cover expected shortfalls. We raised \$665,000 in this effort which is being used for:

- Emergency gifts to diocesan institutions
- Assessment relief for congregations in 2020, 2021, and 2022



DEVELOPMENT

Other Development Priorities for 2021

- Fundraising for an endowment for a Canon-level position on Racial, Social, and Environmental Justice
- Retrofit and strategic planning for a community arts hub at Trinity + St. Peters
- Developing partnerships and seeking grant opportunities for reforestation efforts in the Diocese of Haiti
- Increasing capacity for Essential Housing projects



STEWARDSHIP

Stewardship Consultations

- Deep dive into your fundraising trends
- Create, review, and improve case statements and campaign materials
- Suggest online fundraising strategies including virtual offering plates and website / app-based giving
- Preaching, teaching, workshops on fundraising in your congregation
- Up-to-date Stewardship information always available at:
<https://diocal.org/support/stewardship>

Stewardship Training

- In February through September a strong cohort of stewardship leaders joined together every fourth Thursday for a webinar-based Stewardship Series covering best practices, formation tools, planned giving essentials, and campaign strategies for fundraising. You may find all these webinars on the Stewardship webpage.



STEWARDSHIP

- Our Fourth-Thursday webinars will continue with a new program
- Teaching, Learning, Practicing
 - Theology of Abundance
 - The power and responsibility of our money
 - Ways to increase formation about money and meaning
 - Practical and strategic tools for increasing fundraising capacity
 - Collaborating with local business and other congregations

A Year of Living Generously



Register at

<https://www.eventbrite.com/e/189236701067>

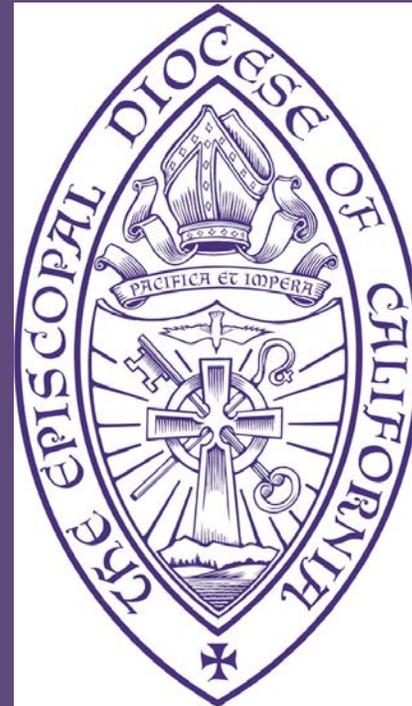
DEVELOPMENT OPPORTUNITIES

- Diocesan Staff will consult on capital campaigns in your congregation, school, or ministry. Ask us how!
- Diocesan Staff can help you plan your outreach fundraisers, galas, and events
- Disaster Relief fundraising strategies
- Continued fundraising for Environmental Justice, Reforestation, and Climate Change

PLANNED GIVING UPDATE

2022 Priorities

- Accepting and setting up securities donations
- Congregation consultations for parish legacy society efforts
- Tax workshops and webinars
- Regional events for estate planning





PLANNED GIVING

Did you know...

- That you could give a gift to your church that *costs you nothing* during your lifetime?
 - Learn all about wills, bequests, retirement accounts, and life insurance gifts
- That gifts of *stock can be more beneficial* than giving cash?
 - Avoid capital gains tax and make a beautiful gift to your church for annual or capital giving
- That you could make a gift to your church and *receive an income that you cannot outlive*?
 - Charitable Remainder Trusts, Charitable Gift Annuities, and Pooled Income Funds are all easy to establish and provide wonderful gifts to your designated charities and church while providing you with an income stream for life.
- For more information, you can access our Planned Giving page at <https://diocal.org/support/planned-giving>



PLANNED GIVING

Invite us to your annual events!

- Founder's Days
- Patronal Feasts
- Fundraising Galas and Events

These are all great opportunities to talk about the power of planned giving and legacy in your congregations!

After these years of virtual gathering, does your legacy society need a refresh? Let's talk about how we can inspire planned giving in your congregation or ministry!

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