



DEVELOPMENT, PLANNED GIVING & STEWARDSHIP

INVESTING IN CONGREGATIONS



EXPANDING HORIZONS REPORT

- Innovation
- Compassion
- Transformation
- Ministry
- Investment





2023 EXPANDING HORIZONS DISTRIBUTIONS

As of January 1, 2023, Expanding Horizons had a total of **\$3,871,900** available for distribution.

2023 Distributions made:

- \$50,000 COP-28 Climate Justice
- \$63,200 Episcopal Impact Fund
- \$275,000 The Bishop's Ranch – Completing their distribution from the campaign
- \$64,779 Jubilee Farm Church Missioner and Program
- \$67,579 Vital & Thriving Cohorts
- \$5,300 Bluebird Village consulting

For a total of **\$575,858** in allocations for 2023. 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
- Funding for Canon for Racial, Social, and Environmental Justice



DEVELOPMENT & PLANNED GIVING

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





DEVELOPMENT

Development Priorities for 2023 - 2024

- 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
- Working with partners to transform our Brentwood property into essential housing and a farm
- Increasing capacity for Essential Housing projects
- Raise funds for costs associated with the episcopal transition



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/giving/stewardship>

Stewardship Training

- We continued our Fourth-Thursday Stewardship webinars throughout 2023, and will renew this work in 2024 with some new content.



FUNDRAISING 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

2024 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/giving/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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