The United Church of Canada

The United Church of Canada FOUNDATION

Centennial Legacy Campaign

Frontline Volunteers Handbook

Table of Contents

If you have questions or challenges, contact Tamara Granatstein (tamara@philanthropica.ca or 1-514-244-0705) for assistance.

1. Introduction

1.1 Purpose of the Handbook

This handbook is your guide to supporting the Centennial Legacy Campaign. It equips you with strategies, tools, and insights to engage congregation members in meaningful conversations about legacy giving. As a Frontline Volunteer, you play a vital role in encouraging members to make a lasting commitment to their church's future.

1.2 Overview of the Centennial Legacy Campaign

The Centennial Legacy Campaign celebrates the 100th anniversary of The United Church of Canada. It aims to ensure the church's financial sustainability through legacy giving, allowing members to reflect their faith and values in their estate plans. This Campaign supports congregations, sustains programs, and strengthens the church's ministry for future generations.

1.3 Role of Frontline Volunteers

Frontline Volunteers are the Campaign's ambassadors, bridging the gap between the initiative and individual members of their congregations. Your efforts involve creating personal connections, sharing the vision of the Campaign, and inspiring members to consider how they can contribute to the church's legacy.

2. Campaign Overview

2.1 Objectives

Sustainability

Strengthen financial stability for congregations and church-wide initiatives.

Legacy Giving

Encourage members to include the church in their wills and estate plans.

Celebration

Honor the church's centennial by investing in its long-term future.

2.2 Key Messages

Securing the Future:
"Your legacy gift ensures The United Church of Canada continues to thrive for generations."

Making an Impact:
"Every contribution, no matter its size, strengthens the ministry of our church."

Flexibility:
"Legacy giving is customizable to your personal and financial situation."

2.3 Expected Outcomes

- Increased awareness of legacy giving within congregations.
- Strengthened connections between members and their congregation, and potentially the broader church.
- Enhanced resources to support future programs and initiatives both in congregations and in the broader church.

---

3. Volunteer Responsibilities

3.1 Engaging Congregation Members

Volunteers are tasked with fostering relationships, introducing legacy giving, and addressing any questions or concerns from congregation members.

3.2 Utilizing Campaign Materials

Leverage tools like conversation scripts, donor identification tools and volunteer handbook to maintain clarity and consistency in your outreach efforts.

3.3 Tracking and Reporting

Documenting your interactions with members ensures a comprehensive approach to outreach and helps Campaign organizers measure progress and provide targeted support.

---

4. Engagement Strategies

4.1 Identifying Potential Donors

- **Strong Connection to the church:**
  - Long-time members who are deeply committed to their congregation.
  - Regular attendees who actively participate in church events or programs.
- **Financial Stability:**
  - Retirees or "empty nesters" with disposable income or significant assets.
  - Members who have expressed interest in estate planning or financial stewardship.
- **Values Alignment:**
  - Those who care deeply about the congregation's ministry, community programs, or long-term sustainability.
  - Individuals who have supported special initiatives or made meaningful contributions in the past.
- **Life Stage and Transitions:**
  - People nearing retirement or already retired.
  - Individuals revising their wills or estate plans due to major life changes (e.g., becoming grandparents, selling property).
- **Expressions of Gratitude:**
  - Members who frequently express appreciation for the church's role in their lives and community.

4.2 Approaching Conversations

When initiating a conversation about legacy giving or introducing the Campaign, it's essential to approach with thoughtfulness, empathy, and a sense of connection. Here's a practical framework to guide your initial interactions:

Start with a Warm and Genuine Opening
Begin by focusing on the individual and their connection to the church or community. Use a friendly and personal tone to establish rapport:

- **For someone you know:** "It's so great to see you here today. I've always admired your dedication to [specific church activity or value]. How have you been finding your involvement lately?"
- **For someone you're meeting for the first time:** "I don't think we've had the chance to connect yet, but I've seen your wonderful contributions to [specific initiative or community effort]. It's great to finally meet you."

Shared Values and Vision

Once the conversation flows naturally, gently shift the focus to the values of the Campaign:

- "I've been reflecting recently on the incredible legacy this church has created and the ways we can ensure it continues to thrive for future generations. It's inspiring to think about the impact we can have together."

Introduce the Campaign Softly

Bring up the Campaign in a way that feels natural and non-intrusive:

- "We're starting to explore some exciting initiatives to help secure the future of our church, and I thought you might find it interesting given your passion for [specific interest they've expressed]."
- "I'd love to hear your thoughts on how we can build something truly lasting for our community."

Invite Their Perspective

Show genuine interest in their ideas and feelings by asking open-ended questions

- "What do you think is most important for the future of our community?"
- "Have you ever thought about ways we can leave a lasting legacy for the next generation?"

Keep the Door Open for Future Conversations

Avoid pushing for commitments in the first interaction. Instead, express enthusiasm for continuing the dialogue:

- "It's been great chatting about this—your perspective means a lot. I'd love to follow up over coffee or whenever you have time to share more about what's on your mind."
- "If you're open to it, I'd be happy to share more about what we're planning and get your input."

4.3 Next Steps After Initial Conversations

Once you've had a meaningful initial conversation about legacy giving or the Campaign, it's important to keep the momentum going. The following steps will help you deepen engagement, build trust, and guide individuals toward meaningful involvement:

Reflect and Follow Up Promptly

- **Take Notes:** Immediately after the conversation, jot down key points, such as their interests, concerns, and potential questions. This ensures you can personalize future discussions. Do not do this during the conversation.
- **Send a Thoughtful Follow-Up:** Within a few days, reach out with a warm message to thank them for their time and reiterate something specific they shared. For example:
  - *"Thank you so much for our recent conversation. I really appreciated your thoughts about [specific topic]. I'd love to continue our discussion sometime soon."*

- **Share Relevant Materials:** If appropriate, send materials that align with their interests, such as a brochure, a success story, or details about the Campaign's goals.

Schedule a Deeper Conversation

- **Invite Them to Meet Again:** If they showed interest, suggest a follow-up meeting to explore their ideas further. Frame it as an opportunity to collaborate and hear more of their perspective. For example:
  - *"I'd love to set up a time to chat more about your thoughts on [topic e.g. the Campaign or the future of the congregation]. Your input could be valuable as we shape the future of this effort."*
- **Tailor the Conversation:** Plan to focus on areas they seemed passionate about or had questions on, whether it's a specific initiative, the impact of legacy giving, or the logistics of the Campaign.

Build Trust and Address Questions

- **Be Transparent:** Provide clear and honest answers to any questions they raised during your initial conversation. If you don't have the answers right away, follow up with accurate information later.
- **Address Concerns Thoughtfully:** If they expressed reservations or hesitations, acknowledge them respectfully and offer insights or solutions that could ease their concerns. See the resources for suggestions.

Introduce Next Steps in the Campaign

- **Invite Them to Participate:** Depending on their interest level, invite them to take a small step toward engagement, such as attending a group presentation, meeting with a campaign leader, or exploring a specific legacy giving option.
- **Provide Clear Guidance:** Share specific details about how they can get involved or contribute, ensuring the process feels straightforward and approachable.

Maintain the Relationship

- **Stay in Touch:** Keep them updated on the Campaign's progress, even if they haven't committed yet. Share milestones, success stories, and upcoming events to keep them engaged and inspired.
- **Celebrate Their Involvement:** If they decide to contribute or participate, acknowledge their efforts with gratitude and emphasize the impact they're helping to create.

5. Donor Identification Tool

Purpose
The Donor Identification Tool is designed to help Frontline Volunteers identify congregation members who are most likely to consider legacy giving. By assessing members based on their connection to The United Church of Canada, financial situation, values, and life circumstances, volunteers can prioritize outreach efforts and tailor their approach for maximum impact.

Step 1: Assess Connection to the Church

Why it Matters: Members with a strong connection to their church are more likely to consider supporting its future through legacy giving.

Questions to Ask Yourself:
- Is this person a regular attendee at services or church events?
- Have they been a member of the congregation for many years?
- Do they participate in church activities, such as volunteering or serving on committees?
- Are they vocal about their appreciation for the church's role in their life and community?

Indicators of Strong Connection:
- Longstanding membership (5+ years).
- Active involvement in programs, committees, or events.
- A history of regular giving or consistent participation in stewardship campaigns.

Step 2: Evaluate Financial Stability

Why it Matters: Members with financial stability are better positioned to consider legacy giving, particularly as part of their estate planning.

Questions to Ask Yourself:
- Does this member appear to be financially stable (e.g., retiree, property owner, professional background)?
- Do they have grown children or financial independence from dependents?
- Have they contributed generously to previous church initiatives or demonstrated philanthropic tendencies?

Indicators of Financial Readiness:
- Retired individuals or "empty nesters" with disposable income.
- Ownership of assets such as property, investments, or businesses.
- A history of charitable giving to The United Church of Canada or other causes.

Step 3: Gauge Values Alignment

Why it Matters: Members who strongly believe in the church's ministry and future sustainability are more likely to support it through a legacy gift.

Questions to Ask Yourself:

- Has this person expressed enthusiasm for the church's programs or long-term vision?
- Do they care deeply about specific areas of the church's work (e.g., youth programs, outreach initiatives)?
- Have they voiced concerns about the future of the church or shared ideas for its sustainability?

Indicators of Values Alignment:

- Passionate about the church's ministry and community impact.

---

8. Glossary of Terms

- **Legacy Giving:** Planned contributions that reflect a donor's commitment to the church's ministry.
- **Bequest:** A specific gift made in a will.
- **Donor Identification Tool:** A resource to assess the potential interest of congregation members in planned giving.
- **Campaign Support Forums:** Collaborative events where volunteers gain training and share experiences.

---

9. Contact Information

If you have questions or challenges, contact Tamara Granatstein (tamara@philanthropica.ca or 1-514-244-0705) for assistance.