

Did you know that... Memorial Gifts after the passing of members of a church can either be a great asset to advance the mission and ministry of the local church or it can become a topic of great anxiety? Every church receives memorial gifts. The first priority is caring for the grieving family. By establishing best practices concerning designation and use of memorial gifts, caring for the family stays first and utilization of funds can be a ministry tool toward that end. Many churches have policies (official & unofficial) already but it never hurts to review the basics.

Did You Know a sensitive conversation with the family during preparations for the memorial service can guide the family during their grief. If not already known, discretely discern the deceased member's interest. Briefly let the family know some Memorial Gifts may be received but for now focus on celebrating their loved ones' life and then discuss the use of the Memorial Gifts later. This allows time to review Memorial Gifts options based on an approximate amount. Plan the conversation in a timely manner so a long period does not make it difficult to meet with the family. Otherwise, churches may find themselves with Memorial Funds but no idea how to designate the funds.

Did You Know a "Wish List" of church needs with a broad range of interest areas and anticipated costs prevents headaches? When the time is right to meet with the family, this list gives them ideas for designating the funds within the amount available. Unless there are short term plans for a larger project including the necessary contributions, avoid designating funds for a project that may be years or decades before implementation. The family may later feel their loved one has not been honored in a timely fashion. Obviously these Memorial Gifts should never drive the church priorities.

Did You Know it is essential to establish a policy related to Memorial Gifts to assure consistency is applied to all families. Not doing so can lead to perception of favoritism and unfulfilled wishes which ultimately impacts giving. The following are questions to be answered in preparation for forming an official policy.

- How are undesignated funds allocated? Some churches automatically place these funds into the Endowment, operations

or facility improvements. Once a decision is made, create a policy document that is very clear and guarantee the family accepts the use of the funds per the policy even if they say the gifts are undesignated.

- Who provides oversight of the Memorial Funds? Typically, they are placed with the Finance Committee. There is an argument they should be with the Trustees. If an Endowment Committee exists, since memorials are a form of legacy gifts, this may be the right group.
- Who contacts the family to ascertain the designation? Of course most of the time it will be the pastor, but sometimes others on Finance, Trustees or Endowment have a long standing friendship. Assure the person having the conversation is educated on the Memorial Fund Policy. This person should send a thank you after their meeting.
- Once the designation is established notify the appropriate Ministry Team that the funds will soon be available. Assure the dollars are used per the family request. The Ministry Team should send two thank yous - immediately upon learning of the designation with plans for use and secondly as part of an invitation for the implementation of the ministry.
- If the memorial gifts are sizable or supplemented by an estate gift, what is the church's policy related to a named fund if the family requests something like a scholarship fund? There is no right or wrong answer as long as the policy has been established.

Did You Know the power of a thank you? Discern the time for the official and the hand written Thank You note during the initial implementation of the project. These thank yous show that the loved one is honored, assures the family funds are used as requested, and provides the potential for ongoing conversations with individuals who may not have a church home! Thank you times ten is always a good motto!

Please do not hesitate to call or E-mail to obtain more information so we can serve you!

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