



Committee Contacts

CHAIRPERSON:

Ron Rowland

MEMBERS:

Mildred Gain

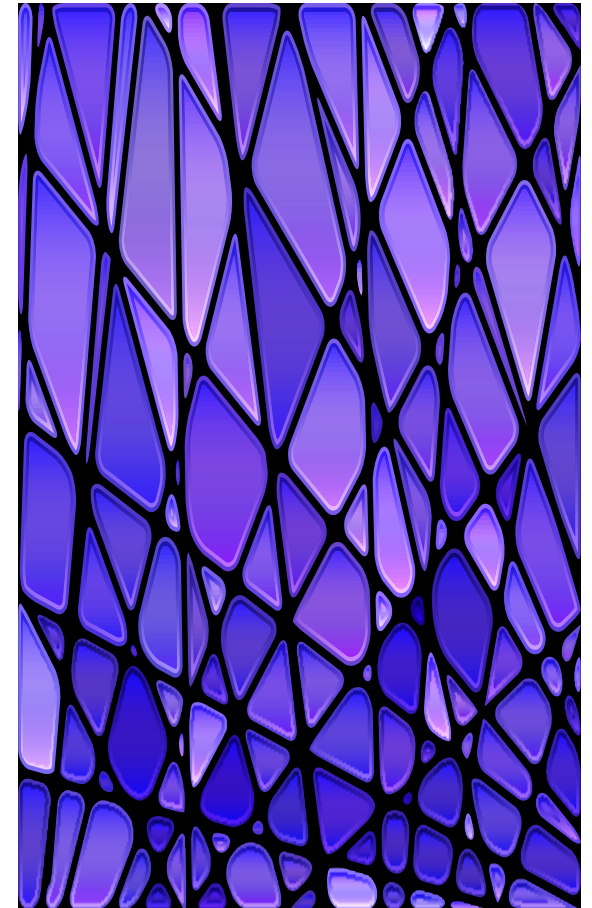
Dan Lacey

Ken Rosselet -
Parish Council Liaison



Saint Peter Planned Giving Committee

Saint Peter Roman Catholic Church
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Columbus, Ohio 43235
616-889-2221
www.stpetercolumbus.com



Mission Statement

The mission of the Planned Giving Committee (“PGC”) is to assist parishioners who desire to make planned gifts to St. Peter. Planned gifts include gifts made through wills and trusts, charitable trusts, life income agreements, IRAs and life insurance. The PGC will assist in the education of parishioners regarding alternatives for giving to St. Peter and coordinate between the St. Peter and the parishioner’s advisors in selecting and making a gift. The PGC will establish and maintain the Simon Society to recognize parishioners who make planned gifts. St. Peter will partner with the Catholic Foundation to provide the vehicles for planned giving and investing endowment funds.

Goals 1/09/2017

1. Increase the awareness of the St. Peter endowment with parishioners through bulletin publications quarterly.
2. Letter from the Pastor encouraging Planned Giving for parishioners 60 years and older.
3. Meet with other committees for increased awareness and support from members.
4. Schedule dinner meetings with targeted individuals for increased awareness of planned giving to St. Peter and the St. Peter Endowment.
5. Develop a recruiting and succession plan to provide for the continuous develop and inclusion of new members on the PGC.

Note: Is there a strategic consideration to hire or contract a PT development person to help and support the parish with increasing the parish offertory and endowment.

Projects / Activities

1. Continuation of Bulletin Messages
 - a. Full page articles on Planned Giving and Endowments once each quarter; January, April, July, October
 - b. Short announcements in between as needed
2. Pastor Letter to Parishioners age 60 and over
 - a. Preparation of list of 60+ parishioners; The Catholic Foundation will assist by working with the Diocese if the parish authorizes The Catholic Foundation
 - b. Time frame is mid-year
 - c. Draft letter for Fr. Summer review
3. Continue “Awareness” Efforts through Meetings with Parish Committees
4. Where possible, identify individuals for one on one meetings
5. Commence “Thank You” Meeting for Simon Society Members
This is a new undertaking which requires discussion of what kind of meeting or meetings would be appropriate and the content of those meetings.
6. Coordinate with Adult Education Committee and plan a Sunday afternoon session of End of Life Planning which would include:
 - a. Living Wills, Health Care Powers, and Powers of Attorney
 - b. Estate Planning with wills, trusts, and other documents
 - c. Funeral planning
7. Solicit input from Fr. Summers, Parish Council and Finance Committee to develop the short term and long range “needs” of St. Peter.

Meeting Schedule

Simon Society: Engage members and schedule a “thank you” meeting.

Committee Meetings: Generally, the PGC meets with the other Parish Committees on All Committee nights. Additional PGC meetings are schedule as required to facilitate and complete projects.

Budget

Budget: Mailing cost for Pastor letter to parishioners over 60. The Simon Society meeting may have a cost estimated at \$500 - \$750. Adult education meeting may have a stipend for a speaker estimated at \$100.