

DEVELOPMENT, PLANNED GIVING & STEWARDSHIP

INVESTING IN CONGREGATIONS

EXPANDING HORIZONS REPORT

- Innovation
- Compassion
- Transformation
- Ministry
- Investment



2022 EXPANDING HORIZONS DISTRIBUTIONS

As of January 1, 2022, Expanding Horizons had a total of **\$3,342,686** available for distribution.

2022 Distributions made:

- \$40,000 St. Barnabas Agricultural School, Diocese of Haiti
- \$50,000 Princess Basma Centre Solar Panel project, Diocese of Jerusalem
- \$84,654 Episcopal Impact Fund
- \$46,400 The Bishop's Ranch
- \$30,000 Jubilee Farm Church Missioner
- \$150,000 to fund Pandemic Assessment Relief to DioCal congregations
- \$57,852 to fund HR Manager / Vice-Chancellor
- \$47,100 to fund property / best use assessments for potential housing development projects in congregations and deanery leadership

For a total of **\$508,006** in allocations for 2022. 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 \$565,000 in this effort which is being used for:

- Emergency gifts to diocesan institutions
- Assessment relief for congregations in 2020, 2021, and 2022
- This work concluded in 2022 as we made the last grants from this fund

DEVELOPMENT

Other Development Priorities for 2023

- 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
- Developing partnerships for funding in solar projects in Palestine
- 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/giving/stewardship>

Stewardship Training

- We continued our Fourth-Thursday Stewardship webinars throughout 2022, and will reengage this work in 2023.

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

2023 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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