



ELCA Foundation
Evangelical Lutheran Church in America
God's work. Our hands.



Partnership Agreement between the ELCA Foundation and the ELCA Southeastern Synod

11/18/2020

Thank you for your support of the ELCA Foundation as a partner institution. The partners of the ELCA Foundation receive the highest level of service from the Foundation and associated Regional Gift Planners in developing and stewarding planned gifts for your ministry, advocating on your behalf with members, and supporting your ministry through charitable gift instruments. This partnership Memorandum of Understanding serves to establish a base level of expectations between the ELCA Foundation (the "Foundation") and the Southeastern Synod (the "Ministry Partner") for the time period described below.

The Responsibilities and Benefits are included in the fee below. Please note that increased engagement by the Synod increases the probability of completing a planned gift on behalf of the Synod.

RESPONSIBILITIES-FOUNDATION

1. Base all work in the theological foundation of our synod's vision, "To equip, empower, and engage God's people to love and serve." (Based on Ephesians 4:12)
2. Focus on the following priorities:
 - a. Work with the Synod to create an **Endowment by mid 2021**.
 - i. Develop Endowment Policy including structure (facilitation of fund, investment goals/strategies, distribution policy) and custodian.
 - ii. Develop Gift Acceptance Policy
 - iii. Develop communication strategy around the Endowment
 - b. Provide **planned giving education** and marketing materials across the Synod to help individuals make meaningful and faithful choices with their estates. Promote the work of the Synod in all engagements.
 - i. Individuals
 1. Provide charitable giving strategies for Stock, Required Minimum Distributions, property, estate gifts, etc.
 - ii. Congregations
 1. Legacy gift plans
 2. Endowment and Gift Acceptance Policies
 3. Accepting Stock, Required Minimum Distributions, property, estate gifts
 - iii. Rostered Ministers

1. Foundation for how legacy giving benefits congregations, the wider church, and partner organizations.
 - c. Begin to **change the culture** of the Synod to one of abundance
3. Represent the ELCA-Foundation and Synod in the Congregations
 - a. Visit (virtually) each deanery at least once/year.
 - b. Be known and available in congregations across the four states of Georgia, Alabama, Tennessee, and Mississippi
 - c. Connect donors to the mission of the Synod and create giving opportunities.
 - d. Create opportunities for donors to be discovered outside the current organization's database.
 - e. Encourage a tithe to the synod for unrestricted bequests in all gift acceptance policies
4. Complete the Stewardship of all planned gifts so that the intention of each donor remains in place. In addition,
 - a. Explore opportunities to grow the gift and/or invite current giving to ministry priorities.
5. Contact all *Living Lutheran Legacy* donors, both individual and congregation, with the intent to complete the gift and provide additional opportunities to give.
6. Provide direction and guidance for giving and follow up to our:
 - a. *Abundance Appeal*
 - b. annual *Mission Support* appeal
7. Facilitate and assist congregations and individuals with more complex giving scenarios (gifts of real estate, Charitable Gift Annuities, Charitable Remainder Trusts, Gifts of Stock, etc.) on behalf of the Synod.
8. Remain connected with the Synod through
 - a. **Quarterly written reports** to track the progress of the program to include completed, proposed, and stewarded gift plans
 - b. **Two annual updates meetings** with all partners to facilitate ministry collaboration and keep the Synod connected to the work of the ELCA-Foundation and gift planner.
 - c. **Annual planning meeting** with the Synod Bishop, staff and others as appropriate to identify funding needs and expectations
 - d. Staff meetings, Synod Council Meetings (1x/year), Budget and Finance Meetings, and others as requested.

RESPONSIBILITIES – MINISTRY PARTNER, ELCA SOUTHEASTERN SYNOD

1. Integrate the work of the gift planner into the strategy of the Synod.
2. Consider the gift planner to be a member of the Synod staff.
3. Work with the gift planner to develop Synod Gift Acceptance and Endowment Policies.

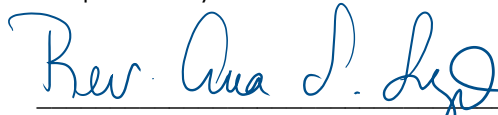
4. Work with the gift planner to integrate planned giving opportunities and structure within the Synod's annual giving efforts.
5. Work with the gift planner to coordinate joint visits to congregations to promote the mission of the Synod and opportunities to give.
6. Work with the gift planner to host legacy workshops/seminars in person or remotely to cultivate potential planned gifts from donors and volunteers connected to the Synod.

Annual Fee: \$10,000 to be billed quarterly.
\$1,600.00 Prorated for 2020. \$10,000 for 2021, billed quarterly.

Billing Contact:

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Prepared by:

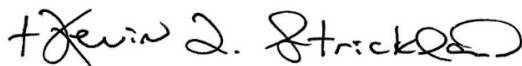


Gift Planner Rev. Ana L. Lugo
ELCA Foundation Representative



Date

Approved by:



Bishop Kevin Strickland,
ELCA-Southeastern Synod

November 23, 2020

Date