



MEMORIAL and HONOR FUNDS
In LOCAL CHURCHES

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Establishing a
Ministry of Remembrance

MEMORIAL AND HONOR GIVING

Some people want to give and have those gifts used immediately to buy a needed item or service on behalf of the congregation. Some want to give and only have the income used. The first is usually called “memorial” or “honor” giving. The latter is often called “endowment” giving. Actually, memorial gifts can be directed to either purpose. Both Memorial/Honor Funds and Endowment Funds ought to be part of the Gift Planning Strategy of a congregation.

The gift-planning strategy of a congregation ought to be to facilitate a person’s desire to give. Most churches have some form of a Memorial Fund. In many cases, these funds encourage people not to give. They do this because the monies in the Memorial Fund are not used to facilitate the mission and ministry of the church. Many church’s Memorial Funds have a balance between \$5,000 and \$25,000. These funds were given years ago and there is only a vague recollection that they were to be used for some special purpose, but what that purpose was has long ago been forgotten. Seeing that the money is not being used does not encourage people to give to the fund.

Memorial gifts are traditionally given at the time of a person’s death. The invitation is often listed in the obituary as “in lieu of flowers.” They are a means of saying that a person was important and will be missed. But, memorial gifts do not always have to come at a person’s death. Some people also like to make memorial gifts on the anniversary of someone’s death, or on another date significant in the life of the individual. Some gifts are given to “honor” someone who is still alive. It is a celebration of one’s life at an anniversary, birthday, or just to say “thanks.” We know of a woman who has an aunt who is very close to her. The aunt is past eighty, yet very vibrant in all she does. She doesn’t need any more gifts. In fact, she is in the process of giving away much of the stuff she has accumulated through the years. On her birthday, the niece makes a gift in honor of her aunt through the Memorial Fund for youth ministry, her aunt’s favorite!

Does your church encourage gifts through your church’s Memorial Funds? The scenario in some churches is bleak. When Mom died, the children decided what the church needed was new choir robes—after all, Mom sang in the choir all her adult life. Her involvement in the church was because of the choir. The choir needed new robes and that would be a lasting tribute to Mom. The obituary in the paper invited persons to make memorial gifts to the church “in lieu of flowers.” Of the \$3,500 cost for new robes, \$2,500 was given. Then the memorial committee waited until the rest came in. That was seven years ago and they are still waiting. Meanwhile, the family has left the church in anger over the memorial never being completed.

The problem is that, in most churches, there is not a committee or policy for memorial gifts. There is just one person who manages the funds, usually in a bank savings account. No one is really in charge. People know there is a fund, but because of its inactivity, they do not see any need to give to it.

INSTITUTE A SIX-MONTH MEMORIAL POLICY

The problem in the above scenario is that the family was never given a report of the progress of the fund. In other cases, money has been given, but no communication has been made with the family to decide how it is to be spent. In still other cases, churches simply put the funds in the general account and the money is “lost.” People know that money has been given, but they never see any of it being spent for any program mission, or ministry of the church.

With a six-month memorial policy all funds must be spent within six months of a person’s death, or within six months of the time the money was given to the church. After a person’s death, or money given to the church in memory or honor of someone, but no later than six months, someone from the church communicates with a representative of the deceased (honored) to see what is to become of the money that has been given. If there has been no declaration of intent, the church can make suggestions regarding the use of the money. If the family had previously selected a use for the money, but not enough was given to purchase the selected item, the family should be given a choice: [1] select a new item for the memorial, consistent with the amount that has been given; or [2] see if the family can come up with the additional funds to fulfill their gift selection. In many cases, the family will raise the rest of the money. They have chosen a fitting memorial and they will find a way to make it happen.

The leadership of the church should control gift selection! Left to their own, most people do not know what the church needs. What they see is what they think the church needs. What they see is usually something to do with worship: a brass cross, a brass candlestick, or brass communion ware. The church can use only so much brass!

Annually, the leaders of the church should decide what kinds of gifts they would like to receive in the coming year through the memorial and honor gift fund. Include in the list items that cost a lot. Maybe the church needs a new computer system for \$2,500. Also, include small gifts. You may want to put Bibles in each of the classrooms at \$15 each. Include program gifts (Vacation Church School or Youth Ministries) as well as potential mission gifts (Habitat for Humanity or your church’s mission in Mozambique). List the gift as well as the cost of the gift. If you have a current (or near-future) building program, include gifts to the new building of chairs, wallboards, podiums, sound systems, etc., in memory of or in honor of a loved one. Revise this list and have it approved by the Trustees/Church Council at least annually, if not more often.

Six Elements of a Memorial Fund

1. Appropriate and immediate response to donors and family.
2. A public and permanent record of the name of the person being remembered.
3. Adherence to policy on the use of such funds.
4. Complete annual reports to the congregation of income, purchases, and balance.
5. Both immediate and annual recognition of person being remembered.
6. Annual contact with the family of those remembered.

ORGANIZATION

Organization is key to any program or ministry in the church! Recruit at least three persons to be part of the committee. When you have just one person, not much gets done except record keeping. When you have two persons, they sit and talk about all they cannot get done. With three persons, there is enough discussion to actually get the work done. Give each member of the committee something to do! If you have three persons, have one in charge of “marketing.” This is the work of helping people in the congregation know that they can make gifts through this fund and how the gifts are used. Put one person in charge of sending thank you notes to those who give, and sending recognition that a gift was received to a member of the memorialized person’s family. (Of course, the note to the family should NOT state the individual amounts received from each donor!) The third person can keep good records of who gave, how much, and how the money has been spent.

Set up a system to let persons know that a gift has been received. All gifts should be recorded in some form of memorial record. This is often a type of album set out for all to see. Purchase standard memorial cards, or work with a printer to design a memorial card just for your church. Use these cards to report to givers a word of appreciation for their gift. Within a week of a gift being received, a note of appreciation should be sent to the donor. These notes go a long way in inviting people to make subsequent gifts. On the other hand, when people are not thanked for their gift, they may not be so ready to donate in the future.

Send a report to the family of the deceased (or the person honored) of the gifts received. While these do not state the value of each donation, a periodic report of the total funds received to date will be appreciated. It may also encourage the family to make additional gifts, if they are needed to reach a target amount. Make sure you keep the family informed regarding these memorial gifts, especially when their final use is determined.

Annually, select a time to recognize those persons who have died in the past year and to consecrate the gifts put into the ministry of the church through the memorial and honor fund. There are several times in the year when a church can celebrate Memorial Sunday. Memorial Sunday on the calendar may not be the right time for your church. This may be a low Sunday, as everyone is anticipating summer. Some churches use All Saints Day, the first Sunday in November. Others find Heritage Sunday, the fourth Sunday in April, to work well. Others have a Homecoming Sunday or Rally Day in the fall. Any Sunday will work! Memorialize and remember all those persons who have died in the last year. The accounting person on the committee should keep close records throughout the year. Keep a record of those members and friends of the church who have died. Also keep a close record of those persons who died in the last year who are related to members and friends of your church. You may want to include persons from your community or the world who have died in the last year.

A Remembering Space

A space within the church building, preferably a very visible space, can be created which will serve as a constant and continual reminder of the contributions and lives of 'those who have gone before.' The space should convey both good taste and permanence. It can contain appropriate art works, a 'Book of Abiding Memory,' wall plaques and historical objects.

Invite all those whose lives have been touched by those you will memorialize to come to the Memorial Sunday service of recognition. Besides notices in your bulletin or newsletter, send personal notes to those who represent persons who have died in the past year. Invite them to attend this special time of recognition. This is especially true if you are dedicating a memorial item to their loved one. During the service, consecrate those gifts that were placed into service in the past year through the memorial/honor fund. Find a way to praise God and thank persons for life lived and for the ministry of your church.

Celebrate the Saints in Worship

- ❑ Focus worship on Thanksgiving to God for the lives of local people and for the lives of well-known figures such as Susanna Wesley or Francis of Assisi. God was glorious in them, and we long for a continuing sense of communion with them as we proclaim in the Apostles' Creed.
- ❑ Choose music that your congregation can do meaningfully. If "For All the Saints" is difficult for your members to sing, try "Forward Through the Ages."
- ❑ Tell stories about the people in your congregation who have died. Include in the sermon brief remembrances of local saints who lived in other times and places. One useful source is *For All the Saints*, edited by Clifton F. Guthrie.
- ❑ Host a banner-making session during Sunday school a week or two before the Memorial Sunday celebration. Invite the youth and children to help make banners of saints' names. Be sure to include members of your congregation who have died in the last several years. Display banners in the sanctuary.
- ❑ Read the names of those who have died, and ring the church bell after each name. Write a litany for this action (see attached).
- ❑ Celebrate Holy Communion, which reminds us that the living and the dead are always together in Christ. Use "The Great Thanksgiving Prayer for All Saints Day and Memorial Occasions" found in the *Book of Worship*.

At the same time, design a special Memorial brochure. People will not give, and often cannot give, unless they are provided with a means to give. Use this sample brochure as a model for your church's brochure. Be sure to include in the brochure:

- Ways that people can give
- Types of gifts they may wish to consider making
- How to give
- Where to send their gifts

People want to give, but often need ideas to spark their action. In the first section of your brochure list ways people can give to your fund:

- Memorial Gifts—these are the most common type of donation you will receive. Most will come in around the time of a person's death. However, some may have wanted to make a gift, but just didn't get around to it. Is there a way for them to make a gift later on? Let them know they can. Some will make a gift on the anniversary of a loved one's death, or at the time they would have celebrated their birthday each year. Without your giving persons permission to do so, these gifts will not be made.
- Honor Gifts—most persons would not think of making a memorial gift when a person is still alive. Give them permission to make a gift through your church's fund even before a person is deceased. Give them suggestions regarding making a gift on the occasion of a person's birthday, anniversary, or just a time when they are thinking of that person. A Sunday School teacher, youth worker, or other leader in your congregation has profoundly influenced many of the people in your church. Don't make people wait until someone is dead to say how important an individual has been to others.

Your church will want to control the types of gifts you receive. In the second panel of your brochure, make a list of the gifts that have been pre-approved and the estimated cost of each of them. Include not only large gifts, but individual gifts almost anyone can afford. Make sure to update this list annually and report to the congregation when gifts are received.

The third panel of your brochure will include a place to record the donor's name, address, phone number, etc. Also include a place to record who is to be remembered or honored, and the amount of the gift. Provide a list for which the giver can record choices for their gift: as the church needs, as the family has chosen, into the permanent endowment fund, or for the following (leave a blank space for them to fill in).

The most important part of the brochure is often left out. It is easy to assume that everyone knows where the church is and how to get things to the office. Don't assume! Put the church's correct address and phone number on the brochure where everyone will see it. If someone has to look up the address, or worse yet, can't find the address, the intended gift will not be forthcoming.

Give this brochure to everyone who attends the memorial service. Find other ways during the year to give the brochure to everyone in the church. Ask them to keep it until they need it. Put extra copies of the brochure in a location in the church where people will walk by and pick one up. You never know when someone is thinking of making a gift.

Don't forget to place these brochures at the local funeral home. Every funeral home has a storage area full of brochures for making gifts to the Heart Fund or the Cancer Society. Why isn't your church part of that supply of memorial possibilities? Funeral directors are the first ones the family will talk with about making memorial gifts. It is usually one of the questions a funeral director asks as the obituary is being written for the newspaper. Establishing a good relationship with the funeral home(s) in your community and securing the funeral directors' cooperation in displaying your brochures can give a boost to your efforts and provide a source of comfort to those who mourn the loss of a loved one and are seeking an appropriate way to remember their departed.

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