



An Overview of LCMS Foundation Training Courses and Seminars

Course Fees

Course One: Funding the Mission 2 Days \$ 350

- Seminar 1- Discover the Joy of Giving
- Seminar 2- Uncover Your Promise – Determining the Case for Support
- Seminar 3- Nurturing Gift Development Systematically
- Seminar 4- Developing Lifetime Plans for Giving

Course Two: Stewarding Trust & Consecration..... 1 Day \$ 125

- Seminar 5- Encouraging Generosity in Biblical “1st Fruit” Stewards
- Seminar 6- Developing Strategic and Visionary Plans
- Seminar 7- Communicating and Strengthening Your Promise
- Seminar 8- Fiduciary Fitness: Financial Pro Forma Planning
- Guided Practicum Assignment 1 & 2

Christian Stewardship Associate (CSA) Certificate with Completion of Courses 1&2)

Course Three: Transfer the Blessing of Inheritance 1 Day \$ 175

- Seminar 9- Planning Gifts Techniques and Transactions
- Seminar 10- Developing a Personal Gift Plan
- Seminar 11- Building a Mentor Ministries and Team
- Seminar 12- Encouraging Generosity: Creating Awareness & Vision

Course Four: Endowing the Vision 1 Day \$ 150

- Seminar 13- Biblical Endowment Plans and Practices
- Seminar 14- Trust, Investment & Custodial Services
- Seminar 15- Endowment Policies, Procedures & Supporting Organizations
- Seminar 16- Networking with Advisors and Influencers

Guided Field Experience Assignment 3 & 4 with Gift College and/or Written Test

Christian Gift Planner (CGP) Certificate with Completion of Courses 1, 2, 3, & 4

Course Five: Gifts Today, Tomorrow and Forever.....3 Days \$1,250

- Seminar 17- Quantifying the Science of Gift Development
- Seminar 18- Gifts Today: Annual Core Donor Initiatives
- Seminar 19- Gift Tomorrow: Capital/Principle/Impact Gifts
- Seminar 20- Gifts Forever: Estate & Financial Gift Planning

Course Six: Administrative Sustaining Support and Grants...2 Days \$ 950

- Seminar 21- Integrity & Ethics: What it means to be “Above Reproach”
- Seminar 22- Organize, Involve and Link Volunteer Partners
- Seminar 23- Information Systems & Data Management
- Seminar 24- Development Support, Research & Assessments
- Seminar 25- Grants and Grantors

Guided Field Experience Assignment 5 & 6 with culminating Project & Interview

Certified Development Executive (CDE) Certification with Completion of all Courses

Register at <http://lcmsfoundation.org/New/trainregistration.asp>

Course Schedule for LCMS Organization Seminar Series Training

As of June 10, 2010 (All Courses or Sessions begin at 8:30 a.m. (Assemble at 8:15 a.m.) and end at 4:30 p.m.)

2010 Date	Program	Location	Fee
Fall			
Sep 22-23 (Wed-Thur)	Funding the Mission Course 1	IC-St. Louis, MO	\$ 350
Oct 5-7 (Tue-Thur)	Gifts Today, Tomorrow & Forever Course 5	IC-St. Louis, MO	\$1,250
Nov 9 (Tue)	Stewarding Trust & Consecration Course 2	IC-St. Louis, MO	\$ 125
Nov 10 (Wed)	Transfer the Blessing-Inheritance Course 3	IC-St. Louis, MO	\$ 175
Nov 11 (Thur)	Endowing the Vision Course 4	IC-St. Louis, MO	\$ 150

2011 Date	Program	Location	Registration
Winter			
Jan 25 (Tue)	Stewarding Trust & Consecration Course 2	IC-St. Louis, MO	\$ 125
Jan 26 (Wed)	Transfer the Blessing-Inheritance Course 3	IC-St. Louis, MO	\$ 175
Jan 27 (Thur)	Endowing the Vision Course 4	IC-St. Louis, MO	\$ 150
Feb 21-22 (Mon-Tue)	Support, Infrastructure & Office Course 6	IC-St. Louis, MO	\$ 950
Mar 16-17 (Wed-Thur)	Funding the Mission Course 1	IC-St. Louis, MO	\$ 350

Spring			
Apr 26-28 (Tue-Thur)	Gifts Today, Tomorrow & Forever Course 5	IC-St. Louis, MO	\$1.250
May 4-5 (Wed-Thur)	Funding the Mission Course 1	IC-St. Louis, MO	\$ 350
May 31 (Tue)	Stewarding Trust & Consecration Course 2	IC-St. Louis, MO	\$ 125
June 1 (Wed)	Transfer the Blessing-Inheritance Course 3	IC-St. Louis, MO	\$ 175
June 2 (Thur)	Endowing the Vision Course 4	IC-St. Louis, MO	\$ 150

Fall			
Sep 6 (Tue)	Stewarding Trust & Consecration Course 2	IC-St. Louis, MO	\$ 125
Sep 7 (Wed)	Transfer the Blessing-Inheritance Course 3	IC-St. Louis, MO	\$ 175
Sep 8 (Thur)	Endowing the Vision Course 4	IC-St. Louis, MO	\$ 150
Sep 21-22 (Wed-Thur)	Funding the Mission Course 1	IC-St. Louis, MO	\$ 350
Oct 11-13 (Tue-Thur)	Gifts Today, Tomorrow & Forever Course 5	IC-St. Louis, MO	\$1,250

Consulting Service Options to Fund Your Mission and Endow the Vision of Your Ministry

Our Gift Planning and Gift Development Service Options. This list of options and the price list for funding service options allows ministries to outsource with The LCMS Foundation for comprehensive expertise and resources.

Return on Investment (ROI) ratios listed for expectancies or future gifts documented range from 20:1 to 60:1. For example, if a ROI goal is 60:1, then \$60 in expectancies are the target goal for every \$1 spent. ROI factors for current gift development range from 3:1 to 10:1 depending on gift planning strategies.

Consulting Service	Fee	Description of Service		ROI Goal (Return on Investment)
Workshops	Price for each one-day interactive and practical workshop includes follow up services to equip, guide, plan and implement			
	\$5,000	#1	Build Trust: The Power in Your Promise for Relationships	
	\$5,000	#2	Develop Confidence: Leadership, Vision and Endowment	
	\$5,000	#3	Engage People: A Lifetime Plan for Giving	
Gift Planning Level 1	\$5,000		Transfer the Blessings (TTB) Mentor Training----- ✓ Recruitment of TTB team and congregational gift planner ✓ Training for TTB team – five onsite days ✓ Preparation of personal Lifetime Plan for Giving for each team member ✓ Appointments with qualified prospects for Lifetime Plan for Giving	20:1
Strategic	\$7,500		Strategic Visioning Over Planning ✓ Facilitated planning to uncover the vision of potential among partner audiences, then organize this into strategic action	
	\$10,000		Uncover the Promise Consulting Process (Power in Promise workshop/orientation is prerequisite) ✓ Establishment of leadership team for orientation and preliminary assignments ✓ Two facilitated onsite sessions ✓ Development of Promise Statement ✓ Identification of key audiences and benefits ✓ Reports on strategic implications, audience relations and communication	
	\$20,000		Strategic and Development Planning ✓ includes comprehensive strategic Planning with a Funding Plan included	
Annual Funding for Schools and Ministry	\$10,000		Annual (or Impact*) Funding Initiative ✓ Four day onsite process to Evaluate-Equip-Encourage-Engage - a nourishment endeavor to raise people and gifts today ✓ Assess situational and historical stewardship factors ✓ Equip ministry team with developmental procedures to increase current annual funding	3:1 to 10:1

Information about LCMS Foundation Stewardship Training

Consulting Service	Fee	Description of Service	ROI Goal (Return on Investment)	4
Projects		<ul style="list-style-type: none"> ✓ Inform the development of a Case for Support and guide linkage for nourishing disciples in their stewardship ✓ Direct an intensive process to help leaders effectively ask and follow up: This might include high impact interviews. ✓ Transition members to the next steps and encourage a lifetime planning approach to giving 		
Gift Planning Level 2	\$10,000	Gift Planning and Endowment Review <ul style="list-style-type: none"> ✓ TTB Team development (\$5,000 value) ✓ Gift Planning and Endowment policy review and Endowment Funding initiative with communication package 	25:1	
Gift Planning Level 3	\$15,000	Gift Planning Ministry <ul style="list-style-type: none"> ✓ TTB Team Development and Gift Planning and Endowment Review (\$10,000 value) ✓ Promotional resources for a Case for Support; two presentations ✓ Five additional onsite days for donor gift planning and follow-up 	30:1	
Gift Planning Level 4	\$20,000	Sustainable Gift Planning Ministry Choose best package to fit your ministry needs <ul style="list-style-type: none"> ✓ Promise Workshop (\$5,000 value), ✓ Case for Support \$ 5,000 value), ✓ TTB (\$5,000 value) and ✓ Annual Funding Initiative (\$10,000 value) Promise Workshop (\$5,000 value) and Gift Planning Ministry (\$15,000 value) 	40:1	
Gift Planning Level 5	\$30,000	Advanced Gift Planning and Endowment Initiative <ul style="list-style-type: none"> ✓ Gift Planning Ministry (\$15,000 value) ✓ Two additional days onsite per month ✓ Ten component progression to facilitate donor identification and qualification 	60:1	
Gift Development Level 6	\$60,000	Gift Development Office <ul style="list-style-type: none"> ✓ Workshops (\$5-15,000 value), ✓ Uncover the Promise (\$10,000 value), ✓ Case for Support (\$5,000 value) ✓ Annual Funding Initiative (\$10,000 value), Advanced ✓ Gift Planning and Endowment (\$30,000 value) ✓ Four days onsite per month for balanced focus on current core, capital or impact and endowed gift planni ✓ establish onsite permanent Gift Development Office and Consult Infrastructure and Cultural Change ✓ Build ministries through annual, impact and endowment gifts, including school annual funds 	3:1 for yrs. 1-3 and 6:1 to 10:1 or yrs. 4-5 and 20:1 for yrs 5+	

Certificate and Certification Key:

- CSA- Christian Stewardship Associate Certificate***– 3 Seat days- 2 Courses - This overview of the Biblical Stewardship training from the LCMS Stewardship Ministry is followed by a mentored practicum*. Volunteer team members will discover the multiple ways they can serve to enhance the gifts of God’s people as they live out their lives as disciples today, tomorrow and forever in partnership with your church and school.
- CGP- Christian Gift Planner Certificate**– 5 seat days - 4 courses with guided field experience using the LCMS Foundation’s resources, Crescendo’s Gift College and a written test. This program will provide ministry development and gift planning representatives with what they need to be certified as an LCMS Foundation Associate.
- CDE= Christian Development Executive Comprehensive Development Certification** - 10 seat days - 6 courses plus completion of guided field experiences, assignments and an oral interview or final exam.

***Included in the CSA Practicum:** *Christian Stewardship Associates Practicum with Stewardship Team Leadership Development Bible Studies for congregational lay leaders to lead in their congregation-*

Matthew MinistriesSM Stewardship Mentor Resources- a Matthew Ministries mentor training program will be provided as the field experience for the Christian Stewardship Associate. You will be provided resources and processes learn how to function as a congregational team in a program that recognizes and commissions congregational stewardship mentors to function as encouragers, advocates and mentors for financial leadership to both individual stewards and to leaders of the corporate steward.

Get equipped to encourage the “Grace of Giving” at the congregational level in partnership with LCMS Foundation, LCMS Stewardship Ministries, Lutheran Church Extension Fund, Commission on Ministerial Growth and Support, Concordia Plans Services and other LCMS District and Congregational ministries.

Mentors will become acquainted with the following bible study or small group series. Each comes with practical promotional and follow-up toolkits for mentors to help serve people in the pews of our congregation. These mentor ministries resources will attract others from the community who are struggling with these issues. They, like Matthew before he found Christ, struggle to find love in their day to day life.

These Bible studies and small group discussions are:

- 1) Transfer the Blessings of Inheritance-** This five-part Bible Study looks at the source of the Biblical concept of inheritance and how God's people have transferred the blessing of faithfulness throughout time. Participants will grow deeper in the spiritual and economic wisdom. They will gain insight into the provisions God has ordained for His people throughout the generations
- 2) "Financial Wisdom for a Lifetime"** - Is a five-part Bible study with daily readings to encourage a Biblical view of personal finances. These resources come with specially designed toolkits to help mentors inform and care for people who want to align their decisions on personal financial management with God's Grace both in their homes and in their lives. Suitable for people of all ages and situations, this study encourages with the guidance of God's monetary wisdom.
- 3) Five Requests for Senior Disciples-** There are many things in life that are out of our hands. These requests deal with end of life issues such as a living will and advanced directive decisions that reviews your personal, emotional and spiritual needs as well as your medical and financial desires. What does God's Word say about these issues? How can you relieve the stress of being vulnerable? What request do you have that the legal documents won't detail?

In summary, the five requests or conversations for seniors are about how:

- 1. I want to care for my body, mind and spirit during my life.** This story-record includes-
 - a. The Person(s) I want to make care decisions for me when I can't
 - b. The kind of medical treatment I would like or don't want if I can't communicate myself. This includes the use the legal and medical planning that protects personal freedoms.
 - c. How comfortable I hope to be kept if in a terminal condition
 - d. How I hope people handle and treat me if I can't take care of myself
- 2. I want to share my story with others and give a family blessing.** This story includes-
 - a. What I want my loved ones to know about my faith, challenges and aspirations
 - b. What do I wish to be remembered for
 - c. What are the Blessings I wish to leave with and transfer to my loved ones?
 - d. What is my vision for my family and their relationship with Christ?
- 3. I want to plan my funeral celebration.** This story- record includes-
 - a. Reflection of the spiritual relationship I have with Christ.
 - b. Planning for a fitting thanksgiving to God for eternal life.
 - c. Provision of a comforting witness and time of joy for those who mourn.
- 4. I want to optimize the blessing of more time on my hands.** This story-record includes-
 - a. Knowing that we are treasures to God and to others
 - b. Being able to use whatever gifts I have to impact others
 - c. How can I still have meaning and joy

5. **I want to trust others with my resources when I can't keep, nor need them.** This story-record includes-
- a. Continuing earthly support for the Kingdom of Grace
 - b. Knowing that the Inheritance I leave behind blesses rather than curses future generations by giving Christ.
 - c. Financial economics of property transfers that conserves costs and maximizes impact
 - d. Reflective of, and conveying my belief in God's sovereignty and ownership
 - e. Being fair, protecting differences and healing scars

4) A Clear View of the Promise- Servant leaders, who work with Church governance and the Pastoral Office to steward the corporate person, will help the body of Christ function more effectively as they discover how to share their faith in engaging ways with others.

Using a book entitled "A Clear View", provides congregational leaders to engage in a thought leader group. The Book serves as a study guide to help leaders look at the opportunity to consider the impact ministry and witness has on others as the promise of faith and witness. This sets the stage for congregation's to look at her mission from the audience perspective to determine how our relationships relate to others.

Working with LCMS Stewardship leaders, these Biblical based study and small group programs provide resources and support for governance and administration leaders at the local level to enhance economic and spiritual vitality for your people and your mission.

5) The Joy of Giving: Encouraging Generosity are Spiritual Gifts- God has placed His giving heart in His baptismal people. Learn new insights for what this means for our lives under the Cross, in our homes and in our communities.

Course Descriptions

Course 1: Funding the Mission

This course introduces the learner to the framework of gift development. This course is a requisite for all certificates and the certification. It introduces the Organization's ten formation systems required for comprehensive Gift Development Certification, Gift Planning Certificate programming, and Stewardship Associate Certificate sessions. This two day course is applicable for Christian congregations and non-profit organizations of all types and is the introduction towards obtaining two certificates and the certification as a Certified Development Executive (CDE).

It will introduce eight stewardship principles for the Christian steward, seven resolves and resourcing factors essential for leadership, and success in developing resources and relationships to accomplish the mission of Christian non-profit organizations. Learn how to uncover and communicate the power of promise in relationships with donors using Biblical truths. Discover six attitudinal giving style segments determined by research and how to communicate your organization's case in vision and promise language.

Attendees will identify keys to "nurturing" relationships and "asking" for gifts with personal channel relationships and discussions. Discover how to engage the involvement of others and coordinate a strategic organizational and development plan. Determine how to apply the fundamentals and techniques for Gift Planning and Endowments plus a lifetime planning process that immediately begins to raise revenue for your organization.

Funding the Mission is the required introductory course for all programs.

Course 2: Stewarding Trust and Consecration

This course explores consecrated stewardship learning centers with approaches to annual first fruits living and giving and how this encourages growth in stewardship. This session will review a developmental approach to strategic planning and provide a framework for creating a vision of potential. Working more deeply into the Power of Promise introduced in Funding the Mission, participants will participate in a process to uncover a Promise and create a communication plan and "Case for Support" using direct response through mass channels." This course ends with a model to integrate revenue planning with expense planning in a developmental financial pro forma. Participants will review key compliance factors for fiduciary leaders to consider for their ministries to be found fit for the public trust. Identify how being a fit fiduciary will increase the confidence of your supporters.

Completion of [Funding the Mission](#) and [Stewarding Trust and Consecration](#) courses are required for the **Christian Stewardship Associate Certificate**

Course Descriptions

Course 3: Transfer the Blessing of Inheritance

Explore the spiritual context of financial and estate planning to nurture charitable gifts over time while caring for family. Students will learn to ask for and plan gifts built upon a broadened understanding of the opportunity and possibility of designing various charitable current, capital and deferred gifts. Students will review the transactional and relational aspects of endowments and Organizations while building awareness about fiduciary requirements in managing gifts in custody as well as the availability of trust and investment services needed to sustain gifts. This course integrates best practices in application of the model standards.

Course 4: Endowing the Vision

Learn to develop policies and procedures to establish and enhance Endowment Funds for organizations and individuals that spring from the wisdom and practices of the Bible. Identify the trust and investment services needed to manage perpetual funds and an efficient approach to custodial management of endowments. Learners will pull together a plan to promote the vision of the organization's mission to encourage endowment gifts. This course ends with an overview of endowment fund formations including supporting organizations and their application to stewardship throughout the generations.

Completion of [Funding the Mission](#) and [Stewarding Trust and Consecration](#) and [Transferring the Blessing of Inheritance](#) and [Endowing the Vision](#) courses are required to complete the **Christian Gift Planner Certificate**.

Course Descriptions

Course 5: Gifts Today, Tomorrow and Forever

This course teaches the components, processes and skills needed to nurture gift planning developed with an immediate benefit to your organization, capital gifts given over time and deferred gifts with intentional step-by-step guidelines and tools. Discover the science of resource development using mathematical computations for leading developmental indicators. Attendees will be given tools to analyze annual, capital and endowed potential. Learn how to establish and improve annual fund Initiatives.

Lutheran Charitable organizations will determine how to apply relational and developmental principles to nurture consecrated stewards and deploy their generosity. Assess problem solving wisdom and communication styles from Myer-Briggs research in order to build team performance and morale. Identify how to organize and assess capital campaigns and establish a framework to organize for intensity and impact while taking advantage of the urgency of major (principle) and capital gifts. Work through a guide to planned giving tools and techniques and practice inquiry, asking and follow-up scenarios. Consider ways to steward donor relationships before and after the gift. Identify trust and investment services required to support an effective gift processing policy and development procedure.

Course 6: Administrative Sustaining Support and Grants

This course explores the strategic involvement of people in the developmental processes and program. Consider the key building blocks for support and administration services required for an effective infrastructure. Determine a checklist of development support services such as data management and donor research tools that guide and track relationship management. Establish partner linkage that engages and cares for dedicated unpaid partners (volunteers). Consider practical ways individual church leaders can be good stewards of their volunteers. Plan events and initiatives that will bridge supporters to sustained giving. Engage your board and ministry leaders in your development success.

Active listening and engaging the gifts of God's people stewards relationships that leads to the results committed donors will provide. Participate in group development planning exercises. Identify how to cultivate grants and work with grantors. Discover development testing and strategic assessments resources that apply demographic and attitudinal segmentation. This course completes the comprehensive program to outfit the gift development leaders to be able to function in a one person or multiple staff environment

Completion of [Funding the Mission](#) and [Stewarding Trust and Consecration](#) and [Transferring the Blessing of Inheritance](#) and [Endowing the Vision](#) and [Gifts Today, Tomorrow and Forever](#) and [Administrative Sustaining Support & Grants](#) courses are required to complete the **"Christaian Development Executive."** © Certification.

What are Participants Saying?

Testimonials

These quotes come from the attendees of the courses to date. Use these to share with others to demonstrate the effectiveness of these seminars and courses:

What kind of people are attending?

- Congregation President
- Volunteers
- Business Administrator
- Development Director
- Project Manager
- Major Gifts Office
- Senior Pastor
- Major Donors
- Chief Development Officer/VP
- Gift Planning Counselors
- Director of Gift Planning
- District Executive
- Pastor
- Executive Director of School
- Principal
- Board Members
- Congregational Accountant/Admin
- Congregational Staff members

Based on your experience, what would you tell others about LCMS Organization training?

- ✓ Very motivating
- ✓ Yes- I wish Pastors, Principals and congregational leaders would attend
- ✓ As a church the resources that are available to churches are so valuable to use for the growth of the church, and in turn, God's Kingdom
- ✓ Absolutely great training! All was wonderful enlightenment!
- ✓ Exceptional! Excellent for all levels
- ✓ The initial ½ day should be shared with all of Organization staff and all ministry leadership and Board of Directors, especially Upper Room/Lower Room
- ✓ It helps refocus on the true meaning of stewardship; not about money, but about hearts
- ✓ Need for strategic planning and organization
- ✓ Stewardship applied to every aspect of our work/church
- ✓ Availability of Resources: The LCMS Organization has so many resources to offer churches and I intend to utilize these service
- ✓ Useful and concise review of Christian Stewardship fundamentals
- ✓ So much! Increased my admiration and respect for our leadership.
- ✓ There is a lot of information in these seminars that requires "off the clock" reading. This is GOOD!
Material can be applied immediately
- ✓ I very much appreciated the Biblical basis that all of this training is based on. It's on track and commensurate with our ministry
- ✓ Terrific for injecting Lutheran/Spiritual dimension in gift planning and gift conversations.
- ✓ I think this is a great experience that is helping to prepare me for a Director of Development
- ✓ The training was relevant, helpful, clear and useful
- ✓ Good Organization for working in development: Helpful and specific actions are possible upon return to home/congregation
- ✓ It is spiritually & biblically based-recommend to pastors and principals
- ✓ Opened my eyes to a new structured way to look at planned giving. I'm excited and interested to learn more...then to apply

What benefit did this training provide to you?

- Familiarize yourself with all the tools; do not need to be an expert. This is why we have the Organization
- Things I can offer churches to enhance Stewardship program
- This LCMS Organization is a team, a resource and a mentor
- Steps for a Lifetime Plan for Giving
- Gift planning procedures/wishes need to be documented to manage legal ramifications
- Options available and how to carry them out
- The need to involve a strategy and planned approach

What did you learn that you can put into practice immediately?

- Reinforcement of my role as a calling and a ministry: I am an generosity encourager
- Development Plan/strategic plan with other Organizations
- The segment on the Promise-How are we viewed by "outsiders"? To begin discussion and formulation of a Promise Statement
- Reach out and involve Pastors.
- Provide adopt-a-student prayer list for the Lutheran Schools
- Planning efficiently- Creation of proper structure

Information about LCMS Foundation Stewardship Training and Consulting

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- Systematical process to build the relationships
- All of it!
- How to develop a great development plan
- Organizational structure for the development of ministry
 - Gift Planning: Begin planning the endowment: Rethink organization of endowment-Forming an Endowment policy; setting up Endowment Fund
- Continue to steward gifts
- Website Applications; I will Link to LCMS Website and use their materials in my work
- Helps me develop a new course of action
- Stewardship principals-Applications & Benchmarks/Review.
- As an accountant at our church to review our Fiduciary Fitness
- Stewardship focus to motivate donors: Fundamentals of Christian Stewardship useful and concise
 - The crisis on the horizon for the congregation
 - Networking

Based on your experience with this course, would you attend another LCMS Organization program?

- Yes- I want to learn more so the resources of God can grow ministry
- Yes, because you ignited an interest in the rest of the topics
- Yes, I want to be certified
- Yes, I need to know the deeper implementation process
- Yes, I am intrigued by the expertise these guys have