

BLESSING **Hope** Faith CULTURE Spiritual Disciplines  
Literacy STEWARDSHIP GROWING Generous Disciples GENEROSITY  
**Joy** CHURCH FINANCIAL  
TIME LOVE Offering Giving LEADERSHIP  
Simplicity Service Abundance  
LIFESTYLE Talent GIFT Vitality MINISTRY RELATIONSHIPS  
Changing Landscape Money MISSION

# Presbytery of the Highlands Church Financial Leadership

The Rev. Dr. Rose Niles  
Ministry Relations Officer for the Northeast

Luke 6:38 (The Message)

Give away your life; you'll find life given back, but not merely given back—given back with bonus and blessing. Giving, not getting is the way. Generosity begets generosity.

Prayer

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# Contact Information

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The Rev. Dr. Rose Eileen Niles  
Ministry Relations Officer for the Northeast  
7 Marion Ct.  
Middletown, NY 10941  
845-326-6501 / 833.461.2307 (toll free)  
[Rose.Niles@PresbyterianFoundation.org](mailto:Rose.Niles@PresbyterianFoundation.org)





IS OUR VISION  
WE CAN HELP.

## Seminars/Workshops/Webinars/Consultation

- **Culture of Generosity** Begin the conversation
- **Leadership** Vital for building a culture of generosity
- **Pastoral Challenges in Stewardship** How to deal with the issue of stewardship and talk about money effectively
- **Visioning** Money follows vision. Vision and core-values are essential
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### Reverend Dr. Rose Niles

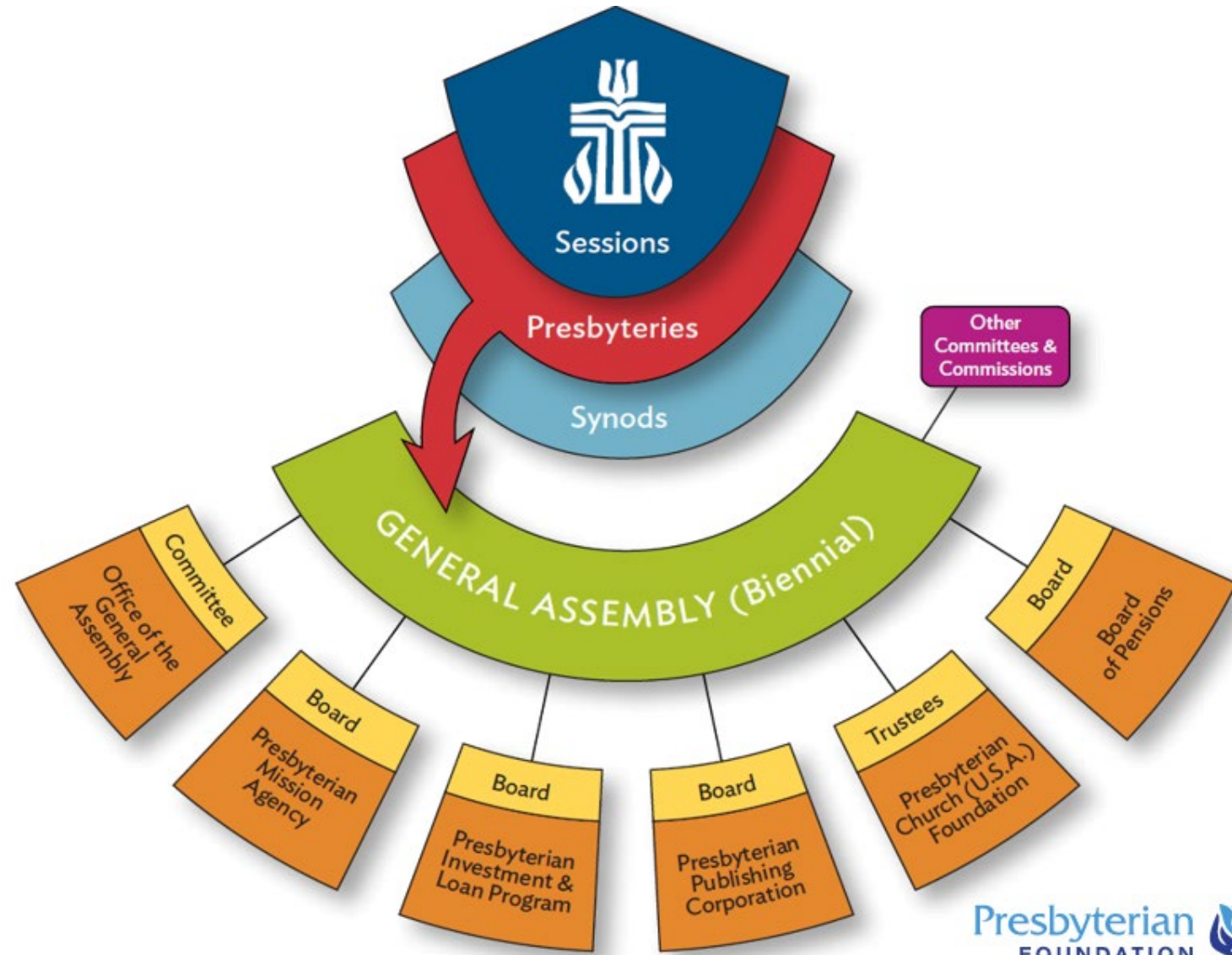
*Ministry Relations Officer, NE Region  
Presbyterian Foundation*

As a life-long Presbyterian, Rose loves working with churches and individuals to help them flourish and further the mission of Christ.

Rose helps cultivate generosity through seminars, workshops, legacy programs, creating fundraising plans, nurtures gift development, and provides finance coaching .







# Presbyterian Foundation

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A vital part of the Presbyterian Church (U.S.A), the Foundation was established in 1799 and cultivates, attracts, and manages financial resources of individuals and institutions to further Christ's mission.



Bringing People and Mission Together



# How To Do It?

Some practical steps

# Partnerships! Being the Connectional Church!

Together!





# BUDGET

## Line Item

vs

## Narrative

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- Accounting Tool
- DOES NOT show how money is being invested
- DOES NOT show how volunteer time and talents are impacting the church
- Should be used by the session

- Visioning Tool
- Shows the programs of the church having a positive impact
- Inspires and helps us see our gifts are really making a difference
- Help us to reframe finances to be about ministry



## ENDOWMENT & INVESTMENT MANAGEMENT OPTIONS

	New Covenant Funds	New Covenant Trust Company	Presbyterian Endowment Service	Presbyterian Endowment Fund
Account Minimum	\$500	\$200,000	\$200,000*	\$25,000
Investment Advisor	SEI**	NCTC	Northern Trust	Northern Trust
Asset Allocation	Self Directed: Equity Fund, Fixed Income Fund, Balanced Funds	Customized to Investment Policy Statement; Stocks, Bonds, ETFs, Mutual Funds	Endowment Model: Equity, Fixed Income, Private Equity	Endowment Model: Equity, Fixed Income, Private Equity
Mutual Fund Expense Ratios	0.80 – 0.97% based on fund selection	Based on funds in portfolio	Based on funds in portfolio	Based on funds in portfolio
Advisor/ Management Fees	N/A	Fees start at 1.00% with breakpoints for larger accounts	.99%	.99%
Liquidity	Daily Priced/Daily Liquid	Daily Priced/Daily Liquid	Quarterly Valuation With Restricted Liquidity	Quarterly Valuation Irrevocable
Rebalancing	Provided on Balanced Funds Only	Provided To Policy Benchmark	Provided To Policy Benchmark	Provided To Policy Benchmark
Spending Formula Distributions	Withdrawals at Investor's Discretion and Timing	Customized to Investment Policy Statement	4.25% of 20-quarter rolling average***	4.25% of 20-quarter rolling average***
Socially Responsible According to MRTI	Yes	Optional	Yes	Yes
Title to Assets	Organization	Organization	Organization	Foundation
Online Account Viewing	Yes	Yes	Yes	Yes

\* However, will take into consideration other investments held with the Presbyterian Foundation.

\*\*SEI Investments Management Corporation (SIMC) is the advisor to the New Covenant Funds which are distributed by SEI Investments Distribution Co (SIDCO). SIMC and SIDCO are wholly-owned subsidiaries of SEI Investments Company.  
Investment involves risk including loss of principal.



An aerial photograph of a dense urban skyline, likely Chicago, featuring numerous skyscrapers and a body of water (Lake Michigan) visible on the left side under a cloudy sky.

[www.newcovenantfunds.com](http://www.newcovenantfunds.com)

New Video Posted under Socially Responsible Investing!



## MRTI Webinar

**Join us for a free webinar on values-based investing and corporate responsibility.**

This webinar is set for **November 16 at 1 p.m. Eastern, 10 a.m. Pacific**. Registration for the webinar will close at end of business on November 11.



This collaborative webinar will highlight presenters from the Presbyterian Committee on Mission Responsibility Through Investment (MRTI) as well as speakers from the [New Covenant Trust Company](#), a subsidiary of the Presbyterian Foundation.

The Foundation and New Covenant Trust Company, in collaboration with MRTI, are committed to providing Presbyterians

approaches to investment strategies that reflect Presbyterian values and that are faithful to the social witness principles of the church, but which also contribute to real impact and positive change made by publicly traded corporations on the issues that matter most deeply to our investors.

**Sign up now** 



Funds

**Donor-Advised Funds**

Endowments

Pooled Income Funds

Donor-Advised Funds

## Donor-Advised Funds Make Giving Easy



### Tools for Charitable Giving

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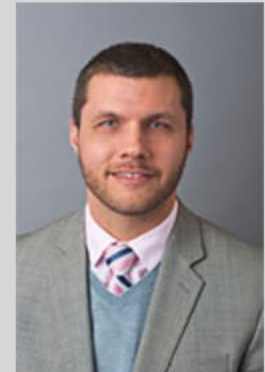


Ministry Relations Program



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FOR MORE  
INFORMATION  
CONTACT:



Joe Tackett,  
Planning and  
Development  
Officer at

[800-858-6127](tel:800-858-6127) ext.

<https://www.presbyterianfoundation.org/donor-advised-funds/>

## Become an Online Giving Program Member

The Presbyterian Foundation's Online Giving Program offers a simple and easy way to raise and manage funds for your mission or ministry. It provides congregations with flexible online giving solutions through a trusted partner able to professionally administer and safeguard the funds you raise.

The Presbyterian Foundation uses the Vanco Payment Solutions platform. Vanco Payment Solutions is an industry leader in providing churches, secure, simple, and specialized payment and giving solutions. Vanco's standards meet Payment Card Industry (PCI) data security standards for handling, storage, and transmitting credit card information.

The Online Giving Program offers your ministry a suite of electronic giving options and funds management services. The program will connect donors to mission and facilitate easy online donations to Presbyterian congregations and ministries. Gifts from your members or supporters are made to the Foundation for the benefit of your church or ministry. The funds are disbursed automatically monthly, and are also made available at your request. The platform makes online giving easy and available to any Presbyterian church or related ministry.



<https://www.presbyterianfoundation.org/wp-content/uploads/2020/09/OnlineGiving-ProgramGuide-8.20-F.pdf>



# Free Resources from the Presbyterian Foundation

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1. Stewardship Navigator
  - Launched April 2019
  - Planned Giving Module added July 2020
  - Narrative Budget Generator Included
  - [www.stewardshipnavigator.com/](http://www.stewardshipnavigator.com/)
2. Church Financial Leadership Academy
  - Short Videos
  - Many Topics
  - [www.churchfla.com](http://www.churchfla.com)
    - Register using code: PCUSA
3. Stewardship Kaleidoscope
  - September 2022 In-Person or Virtual
  - For more information in person or virtual go to:  
[www.stewardshipkaleidoscope.org](http://www.stewardshipkaleidoscope.org)
4. Day of Learning Recordings  
<https://www.presbyterianfoundation.org/resources-from-presbyterian-foundation-day-of-learning-2021/>
4. Various Workshops from your MRO



## Values

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- GRACE, GRATITUDE, GENEROSITY....
- Ultimately: a church or council's principles or standards of behavior; its judgment of what is important
- Synonyms: principles, ethics, moral code, standards, code of behavior
- The principles on which the organization is built
- Answers the question: What do we believe in?
- They are *how* you do things
- They have *EVERYTHING* to do with giving!





## Cultivation – WHAT is our story?

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- What is it you do well? In your church, in your community, in the world?
- How are you participating with Christ?

# Why?

## Gratitude and Value Acknowledgment

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# Visionary Church or Stagnate Church?



Visionary	Stagnate
Changed Lives	Balanced Budget
Need of the World	Guilt
Giving Changes the Giver	Giving balances the budget
Offering is a high moment	Offering is a time -out

# Keys to Success

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- Be prayerful
- Celebrate your church
- Be visionary
- Communicate
- Involve many
- Fund ministry, not raise funds
- Be inviting, not threatening
- Challenge your congregation



# Gratitude

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Stewardship starts with Gratitude

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It is the about the joyous discipline of giving thanks

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Abundance vs. Scarcity

# Recognition - Saying Thank You

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- Pastor-written thank-you notes- Personalized letter-ten notes a week
- Session-written thank-you notes
- Generosity Team writes thank-you notes
- Phone calls
- Annual celebration
- Legacy Society event



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“But I will say this to encourage your generosity: the one who plants little harvests little, and the one who plants plenty harvests plenty. Giving grows out of the heart.....God is ready to overwhelm you with more blessings than you could ever imagine so that you’ll always be taken care of in every way and you’ll have more than enough to share.”

2 Corinthians 9:6-8

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