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Sessum and Armisteads' "Legacy of a Lifetime: A planned giving implementation resource" (book review)

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Book Review



Sessum, Robert L. & Armistead, L. Pendleton. (2021). *Legacy of a Lifetime: A Planned Giving Implementation Resource*. New York: Church Publishing. 200 pp. ISBN 9781640653801

Legacy of a Lifetime: A Planned Giving Implementation Resource offers a systematic, practical month-by-month implementation model for a church to not only cultivate a culture of generosity within a congregation but secure a significant number of planned gifts for a church of any denomination or size.

It is co-authored by Robert Sessum, a retired Episcopal priest with fifty years of ordained ministry, and L. Pendleton Armistead, a fundraising consultant who has successfully raised over 750 million for not-for-profit organizations.

Here, 'planned giving' can be defined as a plan that requires a donor to purposefully integrate a charitable gift into the donor's overall financial, tax and estate planning needs. For example, it includes bequests in a will, naming a beneficiary of retirement plan assets and beneficiary or owner of an existing life insurance plan.

Although the Episcopal Church of the Good Shepherd, in Lexington Kentucky, successfully implemented this model, the book is not about this church's story. Instead, it is a practical fundraising implementation guide suitable for any size church, highlighting six components of a successful giving plan:

1. The essential fundraising need will always involve some aspect of the church's strategic vision;
2. The case for support will focus on communicating the benefits achieved by the fundraising plan;
3. The inspired and influential leadership will seek the broad-based engagement of the church community;
4. Sufficient prospects to achieve the goal will link affluent individuals, engaged in stewardship, who are willing to invest in the church's vision;
5. Plan of action will match quality volunteers with prospective donors, and confirm timelines for confirming donations;
6. Sound management requires the appointment of a dedicated Campaign Manager leading the planned giving program.

The book's top three strengths are its comprehensiveness, its engagement of passionate volunteers instead of a paid fundraising consultant, and the broad-based support it will receive from leadership teams, including clergy, board members and the church's volunteer lay leaders. Another strength is the fact that this book can be adapted for alternative fundraising needs, such as capital building project fundraising or other needs.

The Master Schedule template, printed on page 3, is excellent! It outlines eight "Planning, Research and Cultivation" prioritized action steps, including: 1. Confirm intent to employ program; 2. Identify and enlist campaign leadership; 3. Review or modify gift policies and procedures; 4. Review, adjust and finalize 'master schedule'; 5. Complete 'case for support'; 6. Complete campaign support materials. 7. Identify and assign prospects. 8. Construct organizational chart; 9. Develop solicitation materials.

The next heading, "Cultivation and Solicitation" outlines 7 action steps: 1. Complete church orientation; 2. Implement 'communications sequence'; 3. Solicit Church Board and volunteers; 4. Conduct volunteer training; 5. Solicit active parishioners; 6. Solicit remaining prospect groups; 7. Finalize recognition.

This is followed by six "Evaluation and Continuation" action steps, as follows: 1. Hold Taskforce meetings; 2. Provide update to Church Board; 3. Finalize 'Plan of Campaign'; 4. Develop campaign reporting; 5. Begin stewardship; 6. Implement follow-up activities.

Finally, 'Hold victory celebration' is the final action step noted for December, when the twelve month project ends!

Weaknesses include the intensity of the plan's timeframe. Finding qualified leaders willing to devote the energy and time, especially the Campaign Manager position, will likely be a challenge. Also, a huge commitment is required from approximately twenty-five percent of the total church body to achieve the projected level of success outlined. That number obviously represents a large number of volunteers to supervise, motivate and encourage to complete assignments! One other challenge might be the process of identifying influential donors and matching each person up with a volunteer advocate of the plan. But, the detailed template of this action plan does inspire the reader to catch hold of this project's twelve month implementation scope, and recognize its value as a well-thought out fund development tool.

The audience this book targets is the church leadership, Board members and individuals passionate about the fulfillment of the church's mission and strategic plan.

The charm of this book is its practical application as a volunteer-driven fundraising tool. It is designed to empower a church leadership with the essential resources needed to fulfill its vision and mandate.

Institutions of biblical higher learning offering courses on leadership skills, church administration and strategic planning, church growth, volunteer management, mentorship and fundraising project management will benefit from adding this excellent resource to library collections. In particular, Bible Colleges and Seminaries, plus church leadership planning a major fundraising initiative will enjoy discovering this title.

Reviewer

Nancy (Warwick) Kingdon, Retired