

Thinking About the Possibilities of an Endowment



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Purpose	Policy	Promotion	Product	People
<p>What has brought us to the table tonight? What was the stirring that resulted in calling this meeting?</p> <p>Will the purpose statement be more donor-centered or more institution-centered?</p> <p>What are the values of fewer designated sub-funds v. the values of multiple designations?</p> <p>Is our priority growth for the future or income to fund disciple-making now?</p>	<p>What thinking have we done about the policies that will drive this work?</p> <p>How do we assess risk?</p> <p>Is there any congregational history about risk that is germane?</p> <p>Who will be our fund manager, and why?</p> <p>What gifts are we happy to receive v. what gifts do not help us or are potential liabilities?</p> <p>Will we establish a spending rate? Why?</p> <p>Are we aiming primarily at bequests? If so, why? If we seek current income gifts, where do we stand on annual and capital stewardship?</p> <p>Are all the financial leaders on board with our overall approach?</p>	<p>What are the real dreams and possibilities here?</p> <p>What, if any, are the impediments to launching an endowment fund?</p> <p>What is our basic message to the congregation about the existence of the endowment? What does it make possible?</p> <p>What are our best communication channels? With what frequency shall we communicate about the endowment?</p> <p>How will we say thank you?</p> <p>Shall we have a legacy society?</p> <p>What would a launch event look like? What combination of elements (people, print, website, workshop) is best for our context?</p>	<p>Would any web-based products or people resources help you?</p> <p>Would a legacy giving event like TMF's Putting Your House in Order help?</p> <p>Would website enhancement help?</p> <p>Would a product like Planned Giving Navigator help?</p> <p>To what extent will we engage in one-to-one personal generosity work? Who will do it?</p>	<p>Have we begun to imagine forming relationships with people who might give an endowment gift?</p> <p>Is our church's culture at all fearful about approaching people regarding their generosity?</p> <p>Who in the congregation embodies deep generosity? What does deep generosity look like to us?</p> <p>How will we help people see how their generosity can make a difference?</p>