

22 IDEAS

TO PROMOTE YOUR CHURCH'S

Endowment Fund

These suggestions are designed to follow the questions on Purpose and Promotion on the Thinking About the Possibilities of an Endowment sheet.

- 1 Have a TMF Putting Your House in Order event at your church.
- 2 Never miss an opportunity to communicate the endowment fund. Tell the story of the church's mission and the endowment's place in achieving it. Do not start an endowment and set it on the shelf in the finance office waiting for a gift to come in. Communication is the key to growing an endowment.
- 3 Remember, people (particularly younger people) give to mission, not institutions. In communicating the endowment, emphasize the mission of the church, not the need the church has for money to continue to exist. Be positive, not desperate.
- 4 Make sure the purpose of the endowment is well defined and the specific goals for its use and growth are set and communicated.
- 5 Plan a launch event for a new endowment or a rebirth event for an existing endowment.
- 6 Name a new endowment or rename an existing endowment after something unique to your church. Use the naming/renaming as a tool in promoting the endowment.
- 7 Use special days in the Christian year to invite people to give a gift to the endowment. On All Saints Sunday, encourage members and friends of the church to give a gift in honor of a loved one or someone who has served the church with distinction. Invite people to give a gift to the endowment for Christmas. Give the Christmas themed donation cards to inform the recipient of the gift.
- 8 Create a Legacy Society. Invite people to give \$1000 to the endowment fund to become a member. Allow them to give it all at once, by setting up an account to reach \$1000 or by including the endowment fund in their will of life insurance policy. Add becoming a member of the Legacy Society to your annual finance campaign. Provide a pin and certificate to all members. Ask the members to wear the pin to church. Periodically, run a list of the members of the Legacy Society (with permission) in worship and/or the e-news or newsletter. Invite the Legacy Society members to an appreciation dinner. Make it an event where they are the first who get to see, hear or know something, such as meet the new pastor, see the plans for the new building, etc.
- 9 Engage church leaders in the endowment by inviting them to a dinner to ask them to become a part of the Legacy Society. When the leaders respond, invite the rest of the congregation to follow their lead. Remember, leaders can be financial, high participation, generations of families in the church, etc.

- 10 Let everyone know when money is spent from the interest earned from the endowment. Let them know the difference spending that money will make. Invite them to give to the endowment and make a difference.
- 11 Use existing programs in the church to promote the fund. For example, provide a way for parents, grandparents and sponsors to honor a confirmand at Confirmation Sunday or a senior on Senior Graduation Sunday with a gift to the endowment fund.
- 12 Have a good news story about the endowment fund from the pulpit or in the newsletter once a quarter.
- 13 Regularly run teasers on the endowment fund in the bulletin or newsletter. Show how giving to the endowment fund fits into the mission and purpose of your church.
- 14 Target ages and stages groups within your church to communicate the endowment. Do not rely on a “one message fits all” approach.
- 15 Set a goal for the endowment account before any money will be spent from the fund. Until then, any distributions will go back into the fund. Communicate the progress of how close the fund is to the goal through church publicity. Invite people to give toward that goal.
- 16 Put the endowment in your church’s year-round generosity calendar. If you don’t have one, set a time with your TMF Area Representative to discuss developing one.
- 17 Make giving a gift to the endowment a part of your church’s pathway to discipleship.
- 18 Make sure you have a fool-proof gift acknowledgment system. Acknowledge the giver and the one honored.
- 19 Put a “giving tree” in a visible part of your church.
- 20 Remember, growing your endowment fund will come primarily from major gifts from wills, trusts and life insurance policies. Statistics show that the average gift to the church out of an estate is many times the amount the person gave to the church their entire lifetime.
- 21 Spend at least as much time communicating the endowment to members and friends of the church as you do watching over the investments of the endowed funds.
- 22 If your endowment is overseen by the Trustees of your church, create an Endowment Team to take over the duties of the endowment. The trustees have too many other duties. The endowment deserves having a group that focuses only on it.



My STEWARDSHIP STORY

1

Can you describe a time in your life before you connected with God in a deep and personal way? Looking back at it, what was your approach to stewardship and generosity during that time?

2

Can you point to a time when you learned that you needed to get the personal financial stewardship piece in place to deepen your walk with the Lord?

3

What is now different in your walk with the Lord? How have you grown since that realization? How has God used you?



TEXAS
METHODIST
FOUNDATION
STEWARDSHIP POTENTIAL

www.texasmethodistfoundation.org

To get things started, call your
TMF Area Representative at
800.862.8633

11709 Boulder Lane, Suite 100
Austin, Texas 78726

TOP FIVE REASONS TO READ HENRI NOUWEN'S A SPIRITUALITY OF FUNDRAISING

1

You will be Encouraged

- “Fundraising is a very rich and beautiful activity. It is a confident, joyful, and hope-filled expression of ministry. In ministering to each other, each from the riches that he or she possesses, we work together for the full coming of God’s Kingdom.”
- “Fundraising is proclaiming what we believe in such a way that we offer other people an opportunity to participate with us in our vision and mission.”
- “We are inviting you to invest yourself through the resources that God has given you — your energy, your prayers and your money — in this work to which God has called us.”

2

You will be Challenged

- “We will never be able to ask for money if we do not know how we ourselves relate to money. What is the place of money in our lives?”
- “Are we willing to be converted from our fear of asking, our anxiety about being rejected or feeling humiliated, our depression when someone says, ‘No I’m not going to get involved in your project’?”
- “The Spirit of love says: ‘Don’t be afraid to let go of your need to control your own life. Let me fulfill the true desire of your heart.’”

3

You will be Converted

- “Fundraising is also always a call conversion. And this comes to both those who seek funds and those who have funds. Whether we are asking for money or giving money we are drawn together by God, who is about to do a new thing through our collaboration.”
- “We must claim the confidence to go to a wealthy person knowing that he or she is just as poor and in need of love as we are.”
- “Every time we approach people for money, we must be sure that we are inviting them into this vision of fruitfulness and into a vision that is fruitful.”

4

You will be Inspired

- “Once we are prayerfully committed to placing our whole trust in God, and have become clear that we are concerned only for the Kingdom; once we have learned to love the rich for who they are rather than what they have; and once we believe that we have something of great value to give them, then we will have no trouble at all in asking someone for a large sum of money.”
- “I ask for money standing up, not bowing down because I believe in what I am about. I believe I have something important to offer.”
- “We do not need to worry about the money. Rather, we need to worry about whether, through the invitation we offer them (the donor) and the relationship we develop with them, they will come closer to God.”

5

You will become more Prayerful

- “From beginning to end, fundraising as ministry is grounded in prayer and undertaken in gratitude.”
- “Prayer is the radical starting point of fundraising. To pray is to desire to know more fully the truth that sets us free.”
- “When we approach fundraising in a spirit of gratitude, our confidence in our mission does not depend on how the person we are with responds to our request! We are free to remain secure in God’s love with our hearts set joyfully on the kingdom.”
- Henri Nouwen’s Conclusion: “When we give ourselves to planting and nurturing love here on earth, our efforts will reach beyond our own chronological existence.”



ENDOWMENT FUND COMMITTEE *Local* CONGREGATION

The Endowment Committee Chairman should be a person who has leadership and human relation skills. It should be someone who understands financial management. The chairman should be someone who will make promotion of the endowment funds a major special ministry for him or her and the church. It is recommended the endowment committee should meet monthly.

Members should be those who are striving to be good stewards of all of their resources.

The chairman and the committee should prepare a policy statement for the endowment fund and have it approved by the administrative board or administrative council. The policy statement will include the procedures for handling endowment funds, including receipts, management, disbursement, and reporting.

Members involved in promoting the endowment fund must give special care and attention to maintaining confidentiality on financial matters and personal information related to prospects and donors. Procedures and guidelines need to be established to help those involved avoid any violation of confidentiality.

It is important to develop a list of prospective donors. Keep a record of contacts, which include: date, persons making the contact and the results.

The committee should establish a promotion plan that identifies a yearlong program of contacts, promotion, and materials to be developed.

It is suggested the committee arrange opportunities for committee members to participate in training sessions on planned giving.

A recognition program should be developed to recognize those making commitments unless they prefer to be anonymous.

A report should be given to the administrative board or administrative council or charge conference at least annually.



www.texasmethodistfoundation.org

To get things started, call your
TMF Area Representative at
800.862.8633

11709 Boulder Lane, Suite 100
Austin, Texas 78726

PROMOTING PLANNED GIVING

Planned giving includes gifts beyond cash gifts that require some planning. The following list though not inclusive provides a general overview of planned gifts that can benefit a church and/or another ministry:

- **Current Gifts**, including non-cash gifts, donor-advised funds, and IRA charitable contributions for individuals at least 70½ years old.
- **Life Income Gifts**, including split interest gifts benefiting both the donor and charity such as a charitable gift annuity, charitable remainder trust, or charitable lead trust
- **Bequest Gifts**, including wills, revocable trusts, and other estate plans
- **Gifts through Beneficiary Forms**, life insurance, retirement accounts and other

PROMOTION

Consistent and Intentional Messaging on Planned Giving

Consistent and intentional messaging is essential to help donors give and increase planned gifts to your ministry/endowment. Research shows that church leaders determined the top two reasons Christians do not leave a legacy to their church is “not being asked and not knowing the opportunities.” Weekly/monthly communication is key!

Periodic Planned Giving-Related Seminars

Having periodic sessions such as “lunch and learn” events, workshops, webcasts, and other suitable offerings help donors accomplish their objectives. These sessions are to be led by church leadership and/or a foundation ministry partner.

Comprehensive Approach to Development/Stewardship

The planned giving promotional efforts are to be a part of an overall strategy in the development and stewardship efforts. Planned giving should not be “siloes” from the rest of the development and stewardship efforts related to the promotional communication calendar and its messaging. Manage the communication calendar on a spreadsheet or a project management software system that includes timing for a promotional effort, target audience, distribution channel, distribution date, distribution period (if repeatable), setup deadline, completed date and overall progress of promotional effort. A communication calendar typically includes the following communication channels: Print, Email, social media, Website, Other (Luncheons, videos, announcements, etc.)

Infrastructure in Place to “Make A Gift Happen”

The growth of planned giving relies on the church’s internal individual expertise or a partnership with a foundation ministry to help donors accomplish their charitable intent related to planned gifts. This infrastructure should include the following:

- a. Referral processes to help donors establish estate gifts through wills and/or revocable trusts
- b. Processes in place to help facilitate non-cash gifts
- c. Ability to offer donor-advised funds
- d. Offering help in establishing charitable gift annuities, charitable remainder trusts and charitable lead trusts

Available Resources

Have an ongoing relationship with a third-party who can offer planned giving resources as needed.

Legacy Sunday

Create a “Legacy Sunday” to include a seminar and sermon to focus on the legacy of loving generously through gifts to family, church, and community.

