



**NAUMF**  
NATIONAL ASSOCIATION OF  
UNITED METHODIST  
FOUNDATIONS

# Why Market Your Endowment Program?

Setting up an endowment program is a big step for most churches. It requires vision, hard work and dedication. However, once the program is set up, many of us adopt a *Field of Dreams* mentality. To paraphrase a famous line from the popular 1989 movie, we naively assume “if we build it, they will give.” If that were true, every church endowment would have all the funds it needs. The reality is that creating an endowment program is only the first step. Marketing the program is what makes the endowment grow.

In simple terms, your marketing plan should have three major areas of emphasis: communication, education and celebration.

**Communicate.** Do let people know what you are doing and why. Don't just mention the endowment program once in a while. Remind people of what it can do for them and for the church. Endowment giving should be part of the overall stewardship or giving emphasis of the church, and, as such, should be mentioned in any communication—spoken or written—about giving. Let people know that there are creative ways to give to the church; ways that may help stretch their “giving dollars.” Omitting planned giving as an option from your ongoing stewardship communications materials only translates into lost opportunities.

**Educate.** Planned Giving is a complex topic. Don't assume that everyone automatically knows what it is. Your marketing materials and/or presentations or workshops must clearly explain the benefits of planned giving. They also should attempt to dispel any myths or misperceptions about planned giving. For example, many people believe that planned gifts are just for the most affluent church members. Truthfully, planned giving is an option that everyone should consider. Plan at least one educational workshop a year.

Estate planning and/or end of life planning are essential elements of financial planning. Let people know why is important—if not imperative—to have a will. Foundation staff members are available on a pro bono basis to talk about planned giving and estate planning, and many churches have members who are financial and estate planning experts as well. Some churches offer faith-based financial literacy programs. Learning to manage one's assets and to care and plan for one's heirs is a vital part of comprehensive Christian stewardship.

**Celebrate.** Let church members know how the endowment program is doing. When new gifts come in, thank donors publicly, if possible, but respect the privacy of those donors who prefer to make anonymous gifts. You can acknowledge the gift and thank the donor without necessarily revealing the person's identity. There are many ways to report on the annual growth of your endowment program. Many churches plan a special event honoring donors. Some churches publish an annual report. Some do a combination of both.

The Foundation has a donor recognition program called *The Mustard Seed Society*. Membership is open to anyone who has made a planned gift to their church. Members receive a Mustard Seed Society pin and a certificate signed by the bishop, foundation president and local pastor. The Foundation is happy to make these materials available to local churches.

We encourage every church to develop an annual recognition event. Invite anyone who has set up a planned gift for the church through a bequest, charitable gift annuity, donor advised fund or trust. Report to them on how their gifts are growing and being used. If you are using a portion of your endowment income to fund certain ministries, let donors—and the general membership—know how these gifts are making a difference. Nothing encourages giving like success.

### **In summary:**

1. Constantly look for ways to let the congregation see your endowment program at work.
2. Don't forget to say "thank you."

## **What is your vision?**

The most successful endowment programs—or any giving program for that matter—happen in an environment where clear long-range plans and goals are established, well-communicated and understood. People want to give to ministry. They are attracted to causes and ideas that make a difference in people's lives. Churches that tell stories of mission and ministry through testimony, offering meditations, newsletter articles, videos, email blasts, special events, direct mail and web site content are more likely to excite people about giving.

Look for stories to tell. If you have a donor who is delighted to be leaving a legacy to the church, have the donor tell his or her story. Use the story in a newsletter or church video, or have the donor give a brief talk during worship or at a church event. The Foundation has developed a series of 90-second video spots that tell a story of a particular type of planned gift and what motivated the donor to give. The video spots are available free of charge from the Foundation. To request a DVD, please contact the Foundation toll free at (866) 363-9673. To preview the videos and request copies online, visit the Foundation web site at [www.fumf.org](http://www.fumf.org)

## **What is planned giving?**

Planned giving is all about giving for the long term. Endowment funds are invested to help ensure that the church can continue its mission and ministry beyond our lifetimes. When we make a planned gift, we are giving to something that will continue in perpetuity. Part of the sense of satisfaction that comes from making a planned gift lies in the knowledge that we can make a lasting impact; we can leave a legacy for generations yet to come.

Most church members think of giving in terms of plate offerings. Typically they make a pledge to a stewardship or capital campaign based on anticipated annual income. By contrast, a planned gift typically comes from accumulated assets rather than annual income. A planned gift can be a once-in-a-lifetime gift. In many cases, it may require the assistance of an attorney or other professional financial advisor.

Planned gifts can be as varied as the interests of the donor. They can include such items as stocks and bonds or other appreciated securities, insurance policies, retirement plans, art or antique collections, real estate or other assets. The gifts may be made through such vehicles as trusts, charitable gift annuities, a donor advised fund or a bequest in a will. Often a donor will meet with a financial planner or a representative of the Florida United Methodist Foundation to decide how to fund the gift.

Certain types of planned gifts provide added benefits to donors. For example, some provide tax benefits. Some provide a life income arrangement.

Educating your congregation about planned giving can be daunting. The Foundation's *Planned Giving Guide* and other planned giving publications can be helpful in explaining the benefits of various types of planned gifts. Again, a planned giving or estate planning seminar can be very informative for members who are just learning the language of planned giving. It is a good idea to offer educational workshops on a regular basis.

The Foundation also works with churches to prepare congregations for end of life planning. The Foundation offers an *End of Life Planning Guide* and Foundation staff members are available to lead workshops on how to use it as a resource. Many churches address this topic through a combination of spiritual and practical teachings. For example, the pastor may lead a discussion of spiritual issues, a Foundation staff member may talk about how to organize key information for your survivors and a funeral home director may provide insight into decisions facing families at the death of a loved one. The workshop helps participants become better stewards of their assets and provides them the opportunity to make their wishes known in advance.

## How to communicate

In the world of marketing, most professionals believe that the most effective plans involve “integrated marketing.” That is, you communicate your message through every means possible: through editorial coverage, through advertising, through promotions and special events. When it comes to marketing your planned giving program, your strategy should be similar. Use every means at your disposal.

Talk about planned giving from the pulpit, in church newsletters, at congregational gatherings, in workshops, in brochures, in bulletin inserts, pew cards and other publications. Again, to borrow a principle from the world of marketing, most people don't get the “message” you are trying to convey the first time they hear it. Think about the most successful marketing campaigns you know. You probably remember such corporate slogans as “the real thing” or “you're in good hands” because you have heard them so often and in so many different ways.

Some marketing experts say that consumers have to hear a message at least seven times before they begin to get it. If you are introducing a new idea, communicate it often. People won't automatically remember it; you have to remind them.

## Get your leadership on board

When you first begin your endowment program, make sure to educate your lay leaders. Share the vision with them. Use them to help spread the gospel of planned giving. Meet with your trustees, your finance committee and Church Council. Work with other small groups to help build excitement and support for your program. People who understand the vision will help you keep it alive.

## Challenge your donors

Faithful stewards are inspired stewards. If you want to inspire your prospective donors, look to the familiar. The Bible is perhaps the best source of inspiration when it comes to giving. It is filled with references to giving back to God. The story of the widow's mite and the parable of the talents teach us to give sacrificially and to make the most of our resources. In Matthew 6:19-21, Jesus challenges us to forgo the treasures of this world and seek heavenly treasure for “*where your treasure is, there will your heart be also.*”

In his letters to the early Christians, the Apostle Paul encourages us to be generous and cheerful givers. He teaches us to give as we have decided in our heart to give. Moreover, Paul equates giving with “thanksgiving.”

*“You will be made rich in every way so that you can be generous on every occasion, and through us your generosity will result in thanksgiving to God.” 2 Corinthians 9:12*

Likewise, John Wesley, the founder of Methodism, is famous for his teachings on stewardship. His sermons on *The Use of Money* and *The Good Steward* offer excellent insight into the Wesleyan tradition of giving. Wesley admonished his followers to “earn all you can, save all you can and give all you can.” His teachings still resonate with Christians today.

The theology of stewardship is based on the concept that all we have comes from God. Stewardship is about giving back to God in response to His grace in our lives.

## Make it easy to give

The number one reason people do not leave a bequest or other type of planned gift to the church is that they are never asked. Please remind your congregation about leaving a final tithe to the church. Include reminders in the bulletin. Place cards, brochures or envelopes in the pews. Explain how to make a planned gift to the church. Make it easy to give. Someone may be waiting to be asked.

## Memorial and Honor Giving

Memorial and honor giving are among the most important and meaningful ways to give to a church endowment program. This type of giving allows donors to help sustain the church or favorite ministry, and at the same time, pay tribute to a friend or family member, living or deceased. Often the honoree has been an active and long-time member of the church family.

Permanent Endowment Fund Committees should make sure that members of the congregation understand that tribute gifts are encouraged and accepted. Moreover, they should emphasize how both the gift and the tribute can be lasting. Many churches have created memorial walls to perpetuate the memory of members of the congregation who have been honored. Others have published annual reports highlighting special gifts that have been made “in memory of” or “in honor of” a friend or loved one. Others have placed plaques in appropriate areas of the campus to recognize the contribution of someone who has been honored or memorialized. Still others organize special events to recognize these special contributions.

Honor and memorial gifts may be made to honor a special occasion, such as a birthday or anniversary or some other family milestone. There may be times when persons choose to make a memorial contribution in lieu of flowers at the time of a funeral. There may be a desire to commemorate the anniversary of the birth or death of someone who died some time ago.

Honor gifts are often considered “living memorials” and a way of saying “thank you” to a friend or loved one who has made a significant impact on the donor’s life. Likewise, memorial gifts often translate into a legacy for future generations. Both allow donors to give from the heart. What better way to express such deep feelings of gratitude, remembrance and celebration than through the church that is involved in spreading the good news of Jesus Christ throughout the world?

# Promotional Models

**T**he Foundation's *Planned Giving Handbook* contains in-depth information on how to promote a permanent endowment program. The following information – excerpted from that handbook – outlines two possible models for use in local churches. The first model is the most comprehensive. It begins with a modified promotional emphasis and adds more each year. Model two is a beginning model that can be upgraded as needed. Regardless of the chosen model, always remain sensitive to “overselling” the concept of making a planned gift. If members begin to feel that they are being overwhelmed with a “demand” for a gift, the program will suffer. The model you choose should be tailored to reflect the needs of your congregation.

## MODEL ONE

A Three-Year Plan for Promoting  
Your Church's Permanent Endowment Emphasis

### Year One

Two educational presentations to Church Council

Mailings -

February	Permanent Endowment Fund promotional brochure
May	Wills series brochure
August	General Planned Giving brochure

- Quarterly articles in church newsletter
- One-liners in bulletin once each month (See *Planned Giving Handbook*)
- Wills Clinics or Gifts and Wills Workshop
- Memorial Observance and Service of Remembrance

### Year Two

Quarterly educational presentation to Church Council

Mailings-

February	Wills series brochure
May	Estate planning brochure
August	Wills series brochure
November	Life insurance brochure

- Monthly articles in church newsletter
- One-liners in bulletin twice each month (See *Planned Giving Handbook*)
- Wills Clinic or Gifts and Wills Workshop
- Memorial Observance and Service of Remembrance

## Year Three

Two educational presentations to Church Council

Mailings-

January	Wills series brochure
March	Living trust brochure
May	Wills series brochure
August	Permanent Endowment brochure
November	Year end giving brochure

- Monthly articles in church newsletter
- One-liners in bulletin each week (See *Planned Giving Handbook*)
- Wills Clinic or Gifts and Wills Workshop
- One Estate Planning Seminar
- Target Group Presentations (i.e. UMW, UMM, Senior Adults)
- Memorial Observance and Service of Remembrance

## MODEL TWO

A Two-Year Program of  
Promoting Permanent Endowment

### Year One

February: Make a presentation at a Church Council meeting to church leaders on giving through endowments, memorials and other Permanent Endowment vehicles. Distribute a flyer on giving opportunities. Conduct a written survey.

1. Who has a will?
2. Who has included the church in their will?
3. Who will consider adding the church to their will?
4. Who would like to talk privately about giving options?

May: Send a mailing to the entire congregation about giving options through the church's endowment and memorial program.

November: Send a mailing about the advantages of giving at year-end.

Use one-liners for bulletin and newsletters when appropriate throughout the year.  
(See *Planned Giving Handbook*)

Make announcements at group gatherings in the church (including worship) about giving through the church's endowment and memorial program.

### Year Two

January: Write an article for the newsletter about the necessity of having a will.

February: Send letter and brochure announcing a Wills Workshop.

March: Conduct a Wills Clinic or Gifts and Wills Workshop.

April- September: Write a short statement or article monthly in the church newsletter about the church's endowment and memorial program.

October: Send a letter and brochure about giving through wills.

November: Conduct an All Saints' Day remembrance and recognition service.

# Sample Agenda

## Estate and Gift Planning Workshop

### I. Welcome

- Devotional
- Statement of purpose for the workshop

### II. What is an estate?

- How will my property be distributed?
- What about taxes?
- Who is your estate planning team?

### III. My Will

- What is a will?
- Who needs a will?
- What can a will do? Not do?
- What does it cost?
- Will I need an attorney?
- How do I choose my executor or executrix?
- Who should witness my will?
- Where should I keep my will?
- How often should it be reviewed?
- How can I remember the church in my will?

### IV. Creative Gift Planning

- Cash
- Bequests
- Securities
- Real Estate
- Tangible personal property
- Gifts through life insurance
- Life income gifts
- Gifts through retirement plans
- Gifts through business
- Transfer- on-death accounts

### V. Planned Giving and Endowment Funding in the Local Church

- Why “planned giving” in the local church?
- Endowments and other opportunities in our church

### VI. Other Documents

- Durable Power of Attorney for health care
- Durable Power of Attorney for financial affairs
- Living will

# Planned Giving Guide

Giving to The United Methodist Church can take many forms. The Foundation encourages donors to explore ways that are best for them. Options available through planned giving offer creative alternatives that often benefit both donor and recipient. Here are some charitable gift ideas that are simple to execute, and can be used to benefit your church or any Florida Conference church-related charity. Before making a final decision, please consult with your professional financial advisor or contact the Florida United Methodist Foundation toll-free at (866) 363-9673.

GIFTS YOU CAN MAKE NOW			
Your Goal	Type of Gift	How To Give	Benefits
Make a quick and simple gift.	Appreciated Securities	Transfer stock or mutual funds to your church. If your church does not have a brokerage account, donations may be made through the Foundation.	Donor avoids capital gains taxes and receives an income tax deduction; church sells shares tax-free.
Avoid capital gains tax on the sale of a home or other real estate.	Appreciated Real Estate	Donate property to your church.	Immediate income tax deduction and avoidance of capital gains tax.
Make a gift that allows flexibility and your input on how funds will be distributed.	Donor Advised Fund	Create an agreement whereby Foundation manages your assets; you and/or family members advise the Foundation regarding charitable disbursements.	Immediate income tax deduction, flexibility and an opportunity to practice philanthropy on a regular basis.
Make a significant gift with little cost to yourself.	Life Insurance	Designate your church as a beneficiary.	Future gift to church.
Give your personal residence or farm, but continue to live there.	Retained Life Estate	Designate the ownership of your home to your church but retain occupancy.	Charitable income tax deduction and lifetime use of your home.
Avoid taxation on retirement plan assets.	Retirement Plan	Name your church as beneficiary of the remainder of the assets after your lifetime.	Avoidance of heavily taxed gift to heirs.

GIFTS YOU CAN DEFER			
Your Goal	Type of Gift	How To Give	Benefits
Defer a gift until after your lifetime.	Bequest in Will	Leave your legacy and remind loved ones of your faith by tithing part of your estate to the church. A bequest can be a specific amount or asset, or a percentage of your estate. A residual bequest assigns the amount left in the estate after all other distributions have been made.	Your estate receives a tax deduction. The church receives your gift when the estate is settled.
Make a deferred gift, maintain access to assets, avoid probate.	Living Trust	Donor places assets into a trust; retains control during lifetime. Foundation becomes trustee upon death of the donor, and makes distributions as directed by donor.	Privacy, flexibility, control of trust for lifetime, possible estate tax savings.

LIFE INCOME ARRANGEMENTS			
Your Goal	Type of Gift	How To Give	Benefits
Supplement income with fixed annual payments.	Charitable Gift Annuity	Enter into a contract with the Foundation. Foundation pays you fixed payments for life and distributes remainder to church and other charitable beneficiaries.	Charitable income tax deductions, fixed annuity payments for life (portion tax-free), future gift to church.
Supplement income with fixed annual payments.	Charitable Remainder Annuity Trust	Create a charitable trust that pays you a fixed income.	Charitable income tax deduction, fixed income for life, future gift to church.
Create a hedge against inflation over the long term.	Charitable Remainder Unitrust	Create a trust that pays you a percentage of the trust's assets, valued annually.	Immediate income tax deduction, annual income for life that has potential to increase.
Reduce gift and estate taxes on assets passing on to heirs.	Charitable Lead Trust	Create a trust that pays a fixed or variable income to your church or ministry for a set period of time, then passes to heirs.	Reduces size of taxable estate; keeps property in family, often with reduced gift taxes.

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**The Florida United Methodist Foundation, Inc. facilitates giving to churches, agencies and institutions of the Florida Annual Conference of the United Methodist Church. To learn more about our services, please visit our web site at [www.fumf.org](http://www.fumf.org) or call us toll free at (866) 363-9673.**

# Sample Communication Plan

## John Wesley United Methodist Church Planned Giving Communications Plan

### Goal:

To encourage the growth of an endowment from bequests and other planned gifts to support the future work of the church.

### Objectives:

1. To inform church members and seasonal attendees of the establishment, purpose and growth of the endowment and/or designated funds.
2. To educate church members/seasonal attendees about financial vehicles related to planned gifts for the church.
3. To remind church members/seasonal attendees to consider the ministries of the church in their estate planning.
4. To acknowledge and recognize faithful stewards who have supported the endowment and/or designated funds.
5. To celebrate the ministry that has been made possible with the support of the endowment and/or designated funds.

**Objective Strategy****Timing/Frequency****Target Audience****Responsibility**

	<b>Objective Strategy</b>	<b>Timing/Frequency</b>	<b>Target Audience</b>	<b>Responsibility</b>
1	Article in church newsletter	Monthly	Everyone on mailing/ distribution list	Committee
1	PG brochure in worship bulletin	Quarterly	Everyone in worship	Committee
1	Slides during gathering time at worship	Weekly	Everyone in worship	Committee
1	Personalized letter to top donors	One time only	Top 10% of donors	
1	Endowment brochure to be included in a mailing, worship bulletin and/or welcome table	Depends on cost and quantity printed Update annually	All church members Depends on cost and quantity printed	Committee
1	Endowment brochure provided during new member orientations	Monthly	New Members	Pastor or New Member Coordinator
1	Formal report	Annually	Trustees/Church Council	Committee Chairperson
2	Article in newsletter focusing on a specific type of planned gift	Bimonthly	Everyone on mailing/ Distribution list	Committee or guest writer with experience in financial or estate planning
2	Wednesday Night Guest Speaker	Winter	Wednesday night attendees	Foundation representative
2	Special workshop (with meal) on planned giving, estate planning, etc.	Spring and Fall	Those interested in learning more about planned giving models	Committee working with Foundation and/or members with financial planning expertise
3	Eye-catching one-line reminders on slides during gathering time at worship	First Sunday of the month	Everyone in worship	Committee
3	Discussion with individual church members as the occasion arises	On-going	To be determined	Pastor
4	Hand-written thank you note	Immediately on receipt of a gift	Donors	Chairman and/or pastor
4	Official letter for tax purposes	Immediately on receipt of a gift	Donors	Pastor or business administrator
4	List of names of donors (no amounts) on formal report and updated brochure	Annually	Church leadership and congregation	Committee
5	Special Sunday to recognize the ministry of the Endowment	Annually	Everyone in worship	Pastor/Committee
5	Updated brochure to recognize donors and celebrate the endowment ministry	Annually	General membership	Committee

# Sample Tri-fold Brochure

## So Many Ways to Give

For Reference Only

May be adapted to meet the needs of individual churches

### *Cover Panel*

*(You may want to use photos of your church or photos of members and families. You may want to include inspirational quotes from members or philanthropists and Biblical passages that inspire giving.)*

## It's easy to give to *(Church Name)*

Did you know that you can give to *(church name)* in a variety of ways; not just through Sunday morning plate offerings, but in creative ways that allow you to use your assets in addition to income? Thanks to our Permanent Endowment Fund, *(church name)* members can make charitable contributions to the church in just the same way they might donate to any other charity.

### *Inside Panel*

Your gift may be made in many different ways:

#### **Outright gifts**

- Cash
- Publicly Traded Securities
- Real Property
- Tangible Personal Property
- Other Property

#### **Planned Gifts**

- Bequests
- Life Estates
- Life Insurance Policies
- Life Income Programs
- Retirement Plan Gifts

## Leaving Your Legacy

A planned gift to the endowment fund will help ensure that the ministries that have meant the most to you in your lifetime will continue into the future. You do not have to be wealthy to give. You may make gifts in memory or in honor of friends and family. With planned giving, you decide what to give and how to give it. Many planned gifts offer certain advantages to both the donor and the church. You may designate your gift to benefit a certain ministry area. A list of our designated funds include: general endowment (list sub funds approved by Permanent Endowment Committee).

## *Inside Panel*

### Popular Ways to Give

**Appreciated securities** — Transfers of stocks or mutual funds may be made directly from your brokerage account to (church name). To inquire about how to transfer securities, please contact (church office/business administrator) at (phone number).

**Beneficiary designations** — Donors may make a significant deferred gift to the church by designating (church name) as a beneficiary of a life insurance policy or retirement plan. There are many ways to give through life insurance and retirement plans, some of which may have benefits to donors. Please consult your financial advisor.

**Bequest in your will** — Give a fixed amount or item (or property) to the church. Some donors prefer to designate a percentage of their estate or donate the residual amount left in the estate after all other bequests are granted.

**Personal property** — Personal property such as automobiles, works of art, antiques, coin or stamp collections, jewelry and other items also may be given to the church.

**Life income plans** — Life income plans such as charitable gift annuities and charitable remainder trusts may be set up through the Florida United Methodist Foundation to benefit (church name). Donors receive a charitable deduction when the gift is made and income throughout their lifetimes. The remainder goes to the church upon the death of the donor.

*List other types of gifts as appropriate*

## *Back Panel*

### *Disclaimer and contact information*

*The purpose of this publication is to provide general gift giving information. Neither the author nor this organization is engaged in rendering legal or tax advisory service. State laws govern wills, trusts and charitable gifts made in a contractual agreement. For advice and assistance in specific cases, the services of an attorney or other professional advisor should be obtained.*

*(Name and address of church, phone number, web address and email address.)*

## SOME FACTS TO CONSIDER

1. While conference/area United Methodist Foundations are positioned to provide assistance in consultation and planning with donors and in the administration and management of the gift plan options discussed in this handbook, the donor should always be advised to consult his or her own legal and financial advisors.
2. Churches, and all other charitable organizations, are advised to make an intentional effort to fully understand all facts and implications as to gifts which are offered and should take prompt and appropriate action to accept or reject those gifts to avoid potential problems. For example: Present state and federal environmental regulations and laws make it absolutely critical that a church investigate thoroughly any real property for environmental concerns before the property is accepted. Once the church has accepted a gift of real estate, the environmental liabilities pertaining to that property rest with the church. Always consult with your attorney and other professional advisors before real property gifts are accepted.
3. The purpose of this publication is to provide accurate and authoritative information of a general character only. The (NAME) United Methodist Foundation, Inc. is not engaged in rendering legal or tax advisory services. For advice or assistance in specific cases, the services of an attorney or other professional advisor should be obtained.

## Evaluating your endowment program

Your **(Conference Name)** Foundation encourages you to evaluate your endowment program on a regular basis. Frequency may depend on where you are in the process, but once the program is up and running, we recommend that you set goals and analyze your progress on an annual basis. The evaluation process should help you fine tune your strategic plan and set goals for the following year.

To help with this process, here are some points to consider:

- Measure your annual growth in terms of
  - new gifts received
  - growth of investment income
  - new donors identified
- Have you asked donors within the congregation to self identify? Do you know who is planning to remember the church in their will or living trust? Are you regularly reminding members of the congregation to include the church in their estate planning?
- How well have you communicated with the congregation on the benefits of planned giving?
- What events or educational seminars have been most successful this year?
- How has income from the permanent endowment been used to support or enhance the mission and ministry of the church? How well have you reported the disbursements to the congregation?
- How have you thanked and recognized your donors? Do you have a meaningful recognition program in place?
- Has your core leadership helped promote the program through their example of giving?
- How successfully have you linked the church endowment to the church's mission and/or long range vision for ministry?