

THINKING ABOUT THE POSSIBILITIES OF AN ENDOWMENT

PURPOSE

What has brought us to the table tonight?
What was the stirring that resulted in calling this meeting?

Will the purpose statement be more donor-centered or more institution-centered?

What are the values of fewer designated sub-funds v. the values of multiple designations?

Is our priority growth for the future or income to fund disciple-making now?

POLICY

What thinking have we done about the policies that will drive this work?

How do we assess risk?

Is there any congregational history about risk that is germane?

Who will be our fund manager, and why?

What gifts are we happy to receive v. what gifts do not help us or are potential liabilities?

Will we establish a spending rate? Why?

Are we aiming primarily at bequests? If so, why? If we seek current income gifts, where do we stand on annual and capital stewardship?

Are all the financial leaders on board with our overall approach?

PROMOTION

What are the real dreams and possibilities here?
What, if any, are the impediments to launching an endowment fund?

What is our basic message to the congregation about the existence of the endowment? What does it make possible?

What are our best communication channels?

With what frequency shall we communicate about the endowment?

How will we say thank you?

Shall we have a legacy society?

What would a launch event look like? What combination of elements (people, print, website, workshop) is best for our context?

PRODUCT

Would any web-based products or people resources help you?

Would a legacy giving event like TMF's Putting Your House in Order help?

Would website enhancement help?
Would a product like Planned Giving Navigator help?

To what extent will we engage in one-to-one personal generosity work?
Who will do it?

PEOPLE

Have we begun to imagine forming relationships with people who might give an endowment gift?

Is our church's culture at all fearful about approaching people regarding their generosity?

Who in the congregation embodies deep generosity?
What does deep generosity look like to us?

How will we help people see how their generosity can make a difference?

