

IV. PROMOTING YOUR ENDOWMENT PROGRAM

CREATING YOUR ENDOWMENT PROGRAM

A Resource Guide for Local Churches



Partners in
Stewardship

Successful communications takes vision and dedication. The strategies outlined in this handbook can be effective when implemented as part of an overall stewardship and marketing communications plan. We encourage you to study this handbook and to adapt these ideas as needed. Most likely you will find interesting strategies of your own to illustrate the many ways planned giving can make a difference in the life of your church.

The Foundation offers the following resources:

- 1. Informational Materials** – brochures/posters can provide general information on legacy gifts including wills and annuities.
- 2. Speakers** – Foundation staff members and outside experts are available to make presentations to churches on planned giving, estate planning, and end of life planning.
- 3. Consultation** – Foundation staff members will consult confidentially with individuals who wish to leave a gift to a United Methodist church or charity.
- 4. Websites** – the Foundation’s websites, iumf.org and iumf.giftlegacy.com, offer general information and links to brochures and legacy giving resources.

Please feel free to share your thoughts with us. If you have questions or comments please direct them to:



Iowa United Methodist Foundation
2301 Rittenhouse Street
Des Moines, IA 50321
515.974.8927
Fax: 515.974.8977

iumf.org • iumf.giftlegacy.com
info@iumf.org

The information in this handbook is not intended as legal, tax, or investment advice. Please consult an attorney, tax professional, or investment professional for advice.

What is an Endowment?

Legacy giving is all about giving for the long-term. Legacy gifts are often pooled and invested to endow the church with the resources to grow its mission and ministry beyond our lifetimes. When we make a legacy 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 campaign based on anticipated annual income. By contrast, a legacy gift typically comes from accumulated assets rather than annual income. A legacy 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.

Legacy 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 Foundation to decide how to fund the gift.

Certain types of legacy gifts provide added benefits to donors. For example, some provide tax benefits while others provide a life income arrangement.

There are several ways to educate your congregation about legacy giving. Legacy giving publications can be helpful in explaining the benefits of various types of legacy gifts. A legacy giving or estate planning seminar can be very informative for members who are just learning the language of legacy giving. It is also a good idea to offer educational workshops on a regular basis.

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 legacy giving as an option from your ongoing stewardship communications materials only translates into lost opportunities.

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

Talk about legacy 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 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 be the one to remind them.

EDUCATE. Legacy Giving is a complex topic. Don't assume that everyone automatically knows what it is. Your marketing materials and/or presentations and workshops must clearly explain the benefits of legacy giving. They also should attempt to dispel any myths or misperceptions about legacy giving. For example, many people believe that legacy gifts are just for the most affluent church members. Truthfully, legacy 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 it is important — if not imperative — to have a will. Foundation staff members are available on a pro bono basis to talk about legacy 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.

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 seeing and hearing about successes.

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."

You should also be asking yourselves:

What is our vision? The most successful endowment programs happen in an environment where 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, newsletter articles, videos, e-mail blasts, special events, direct mail and website content are more likely to excite people about giving. If you have a donor who is delighted to be leaving a legacy to the church, have the donor tell their story during worship or at a church event or share their story in your monthly newsletter.

Other important things:

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 legacy 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.

Make it easy to give. The number one reason people do not leave a bequest or other type of legacy 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 because someone may just be waiting to be asked.

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 because 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 to 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.

Promotional Models

The following information outlines two possible models for use in local churches. Model One is a beginning model that can be upgraded as needed. The second model is the most comprehensive. It begins with a modified promotional emphasis and adds more each year. Regardless of the chosen model, always remain sensitive to “overselling” the concept of making a legacy 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.

Promotional Model One

A Two-Year Program for Promoting Your Church’s Permanent Endowment

YEAR ONE

- February: Give 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 with the following questions:
 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.
- Throughout the year: Use one-liners in bulletins and newsletters when appropriate and 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 a letter and brochure announcing a Wills Workshop.
- March: Conduct a Wills Clinic or Gifts and Wills Workshop.
- April – September: Write a short statement or monthly article in the 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.

Promotional Model Two

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

YEAR ONE

- Make two educational presentations to the Church Council.
- Mailings
 - February: Send a letter and permanent endowment fund brochure.
 - May: Send a letter and brochure about giving through wills.
 - August: Send a letter and general planned giving brochure.
- Write quarterly articles in the church newsletter.
- Use one-liners in the bulletins each month.
- Conduct a Wills Clinic or Gifts and Wills Workshop.
- Conduct an All Saints' Day remembrance and recognition service.

YEAR TWO

- Make a quarterly educational presentation to the Administrative Board.
- Mailings
 - February: Send a letter and brochure about giving through wills.
 - May: Send a letter and estate planning brochure.
 - August: Send a letter and brochure about giving through wills.
 - November: Send a letter and brochure about giving through life insurance.
- Write monthly articles in the church newsletter.
- Use one-liners in the bulletin twice each month.
- Conduct a Wills Clinic or Gifts and Wills Workshop.
- Conduct an All Saints' Day remembrance and recognition service.

YEAR THREE

- Make two educational presentations to the Church Council.
- Mailings

- January: Send a letter and brochure about giving through wills.
 - March: Send a letter and living trust brochure.
 - May: Send a letter and brochure about giving through wills.
 - August: Send a letter and permanent endowment fund brochure.
 - November: Send a letter and brochure about year-end giving.
-
- Write monthly articles in the church newsletter.
 - Use one-liners in the bulletin each week.
 - Conduct a Wills Clinic or Gifts and Wills Workshop.
 - Conduct one Estate Planning seminar.
 - Conduct targeted group presentations (i.e. United Methodist Women, United Methodist Men, Senior Adults)
 - 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?

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

Sample Language: To Include a Gift in Your Will

Leaving a gift in your will (a bequest) to your church or favorite United Methodist charity is one of the easiest ways to leave your legacy. You simply write your intentions into your will. As you consult with your attorney on the exact wording to reflect your goals and intentions, be sure to use the correct legal (corporate) name of your church or charity in all final documents.

Example: “*Wesley United Methodist Church (City, State), a nonprofit corporation, or its successor.*”

In your will, you have choices as to how to create your gift. You may choose to leave a fixed dollar amount, or a percentage of your estate, or the residuary estate or a portion thereof. The following is a listing of examples of the most popular types of gifts:

A General Bequest of a stated sum of money may be worded: “I give to _____, an Iowa nonprofit corporation, or its successor (insert the exact dollar amount).”

A Specific Bequest of a certain asset from your estate may be worded: “I give to _____, an Iowa nonprofit corporation, or its successor (insert a description of the particular property).”

A Residuary Bequest, after other bequests and expenses have been paid, may be worded: “I give to _____, an Iowa nonprofit corporation, or its successor all (or a percentage) of the rest, residue and remainder of my estate.”

An Endowed Bequest allows you to restrict the principal of your gift, requiring the Foundation to hold the funds permanently and use only the investment income generated to support beneficiaries indefinitely. “I give to the Iowa United Methodist Foundation, or its successor, all (or a percentage) of the rest, residue and remainder of my estate as a permanent endowment gift to benefit (insert legal name of beneficiary here).”

This information is not intended as legal, tax or investment advice. Please consult your attorney, tax professional or investment professional for advice.

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 church-related charity in the Iowa conference. Before making a final decision, please consult with your professional financial advisor or contact the Iowa United Methodist Foundation at 515-974-8927.

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.	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 the Foundation manages the 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 heir	Reduces size of taxable estate; keeps property in family, often with reduced gift taxes.

The purpose of this publication is to provide general gift, estate and financial planning information. State laws govern wills, trusts and charitable gifts made in a contractual agreement. Advice from legal counsel should be sought when considering these types of gifts. Watch for tax revisions. Some types of gifts may not be available in all states. Check with your professional advisor.

Sample Communications/Promotions Plan

(Church Name) United Methodist Church Planned Giving Communications/Promotions 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	Frequency	Audience	Responsibility
1	Article in church newsletter	Monthly	Everyone on mailing list	Committee
1	PG brochure in worship bulletin	Quarterly	Everyone in worship	Committee
1	Slides during worship gathering time	Weekly	Everyone in worship	Committee
1	Personalized letter to top donors	One time only	Top 10 percent 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 members 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 list	Committee or guest with financial or estate planning experience
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	Committee working with Foundation and/or members with financial planning expertise
3	Eye-catching one-line reminders on slides during worship gathering time	First Sunday of the month	Everyone in worship	Committee
3	Discussion with individual church members as the occasion arises	Ongoing	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:

For Reference Only

May be adapted to meet the needs of individual churches.

Cover Panel

So Many Ways to Give

(You may want to use photos of your church or photos of members and families).

Inside Cover

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?

Outright Gifts

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

Leaving Your Legacy

Beyond your outright gifts, a legacy gift to the endowment fund can 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 legacy giving, you decide what to give and how to give it. Many legacy 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 the Permanent Endowment and Planned Giving Ministry Committee).

Inside Center 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.

Inside Back Panel

Real and Personal Property: Real and personal property such as land, homes, 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 Iowa United Methodist Foundation to benefit (church name). Donors receive a charitable deduction when the gift is made in addition to fixed income payments throughout their lifetimes. The remainder goes to the church upon the death of the donor.

List other types of gifts as appropriate.

Outside Back Panel

(You may want to include inspirational quotes from members or philanthropists and Biblical passages that inspire giving.)

Outside Center

(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 e-mail address).



Partners in
Stewardship

2301 Rittenhouse St. • Des Moines, IA 50321
515.974.8927 • Fax: 515.974.8977
iumf.org • iumf.giftlegacy.com • info@iumf.org

I. OTHER RESOURCES

SOME FACTS TO CONSIDER

1. While the Iowa United Methodist Foundation is positioned to provide assistance in consultation and planning with donors and in the administration and management of the gift plan options discussed in this *Planned Giving 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 Iowa United Methodist Foundation 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 Iowa United Methodist 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?