



## A Guide to Ensuring your Endowment

### Fund Stays Top of Mind

Once you have started an endowment fund, it is essential to use ongoing communications and marketing efforts to raise awareness and solicit donations for the fund. Whether through wills clinics, donor recognition events or regular bulletin updates, your congregation should be well aware of the ministry supported by the endowment.

### Marketing Strategies for Legacy Giving/Endowment

Each church is unique so efforts should be tailored to your congregation's preferred outreach methods. Below are suggestions for effective communication with your congregation:

- Determine who will be involved in the outreach effort. This can be accomplished with a Permanent Endowment Committee or through the trustees of the church. You'll want to include your pastor, key decision makers and any talented church communicators, fund raising experts and financiers.
- Put together a high level timeline with goals and proposed outreach efforts.
- Create informative marketing materials to educate your congregation on the existence of the endowment fund, its uses and future goals.
  - You can start with the Foundation's "Bethlehem First Church" Legacy Ministry Brochure for your congregation. *(Attached)*
- Determine how and where you will communicate endowment news to your congregation on an ongoing basis. This could be in an email blast, a monthly bulletin update, a once a year celebration, on your website or from the pulpit (or a combination of all of the above!).
  - Consider sending a church-wide email or mailed letter from the pastor and a lay person celebrating the opportunity for Legacy Giving
  - Celebrate key milestones and donations
  - Share endowment news in bulletin updates
  - Host celebration Sundays inviting those who have been recipients of the endowment's funds to share their testimony





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- Create a Legacy Giving Society with events and get-togethers where donors and those considering donations can come together to celebrate their work and learn more about future needs
- Post news about Legacy Giving and its impact on your website or social media
- Keeping the endowment on people's hearts and minds will be crucial to the success of your program. Here are some topics for generating attention to Legacy Giving:
  - How to give through your IRA
  - Leave a Legacy this Christmas
  - Testimonies about Planned Giving
  - Consider offering a donation matching program from church leaders during a certain time period
- Use personalized and direct outreach wherever possible. While it is important to have an overarching communications and marketing plan, a personal invitation to give is often the most effective mode of outreach.
- Have a plan for acknowledgement of gifts, including hand-written thank you letters from the pastor and additional recognition, if appropriate.

### **Further Considerations for a Successful Legacy Giving/Endowment Campaign**

Once communications and marketing efforts are in place, your church should evaluate the effectiveness of these efforts on an ongoing basis.

- Legacy Ministry Goals and Reporting to Church Leadership
  - Ensure you have benchmark goals and timelines that you can easily report against
- Marketing and Promotional Materials
  - Are the current materials effective? Are there additional places you could communicate about the endowment?
- Annual Report to the Trustees, Church Council and Charge Conference
  - An annual report should be a key part of your ongoing efforts to ensure appropriate measures are being taken to bolster the fund as needed.



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## Legacy Giving Guide

A member of the Foundation staff will be happy to assist you in navigating legacy giving conversations through our legacy planning guide and other materials. While these conversations can begin at church, they will ultimately need to be carried out between your parishioners and their legal and/or financial advisors.

Below are some key topics to consider along with our Legacy Planning Guide.

- Planning Your Legacy - A Guide To Planning Your Will and Trust:  
<https://gumf.org/planned-giving-resources/>
- Ways to Make a Legacy Gift
- Health Care Directive
- IRA Qualified Charitable Distribution
- IRA Required Minimum Distribution
- IRA and 401(k) Designated Beneficiary Options

The Foundation is a trusted partner in the process of creating, funding and using your endowment. Please reach out to us if any questions arise or you would like further instruction.

Contact us to learn more.

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