

## Role of the Permanent Endowment Fund Committee

Those churches that have established Permanent Endowment Fund Committees either act as a committee of the whole for all purposes or assign the following specific responsibilities to an individual or small sub-committee. The committee as a whole should conduct an annual evaluation.

1. Communications:
  - a. Creates primary church brochures
  - b. Develops library of topical brochures
  - c. Creates annual reports
  - d. Maintains copies of original Permanent Endowment Fund documents, including Gift Acceptance Policies.
  - e. Creates newsletter articles about donors and gift opportunities
  - f. Provides general information to estate planning professionals
  - g. Determines method and frequency of distribution of all written materials.
  - h. Prepares articles about donors.
  - i. Prepares articles about Permanent Endowment Fund giving opportunities.
  - j. Determines who will respond to inquiries about the Fund.
  - k. Provides informational materials to be used by church office when responding to inquiries about the Permanent Endowment Fund.
2. Public Events:
  - a. Develops lists of groups within the church that should be invited to special events
  - b. Develops and hosts workshops on topical events
  - c. Maintains a list of estate planning professionals in the community
  - d. Plans annual celebrations focusing on one endowment area each year
3. Investment:
  - a. Oversees the investment of all assets described in the Fund documents
  - b. Recommends investment policies to the Committee
  - c. Selects and reviews investment progress of asset manager
  - d. Arranges annual audit
4. Legal:
  - a. Reviews basic documents in order to keep them in conformity with all laws that apply to such an endowment program and to ensure that the documents represent the best interest of the church.
  - b. Provides opinion to the Committee on the acceptability of any particular gift

- c. Represents the Committee to any attorney, CPA, or other estate planning professionals of a donor who is planning a specific gift.
5. Cultivation:
  - a. Identifies congregational groups by age:
    - I. Young Adults
    - II. Middle years
    - III. Pre-Retirement
    - IV. Retirees
  - b. Identifies congregational groups by social orientation:
    - I. Singles
    - II. Young Families
    - III. UMV
    - IV. UMM
    - V. Church School Classes
    - VI. Fellowship Groups
  - c. Maintains a listing of potential donors, based on Permanent Endowment principles.
  - d. Recommends to the Committee those potential donors who should be cultivated.
  - e. Recruits those persons who should cultivate potential donors.
6. Donor Recognition:
  - a. Recommends to the Committee the specific way(s) by which donors will be acknowledged.
  - b. Administers the donor recognition program.
7. Evaluation
  - a. Sets goals and analyzes progress on an annual basis. (See “Evaluating Your Endowment Program” section of this Planned Giving Handbook.)