

## Sample 4-Step Action Plan

Your committee develops your plan with input from church staff and lay leadership and in coordination with the church calendar.

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### Step 1 – Build a Strong Endowment Committee

The endowment committee will be the core of your fundraising effort. Determine the desired size and composition of the endowment committee, generally four to eight people from diverse areas of expertise, and identify people who fit the desired skills, capabilities and interests.

Target the identified group of people—using a written job description, explain to them why you’re reaching out and how they can help through the committee. Be sure to get a clear “yes” or “no” from each target.

Once the endowment committee is established, determine roles of each committee member. Be sure the roles are clear, comprehensive and don’t overlap. Provide each member with sufficient training, as well as a training manual or handbook for consistency.

### Step 2 – Determine the Need for Your Endowment

When you’re recruiting volunteers and asking your congregation to donate, you need to be prepared with a rationale that communicates why the fund is worthy of their time and money. Clearly lay out reasons for volunteers and donors to participate in the endowment process.



### Step 3 – Build a Strong Volunteer Group

Identify people with the skills, capabilities and interests who can support the committee’s work. Strive for a group of 10-20 volunteers, with three to four lead volunteers. Use the committee members’ network to find volunteers with proven track records.

Set volunteer expectations and stick to them. If you ask too much, volunteers won’t want to commit. If you ask too little, volunteers will feel like they’re not helping. Find a balance and be flexible of people’s schedules—after all, they are volunteering.

Once your volunteer core is established, train volunteers on your process, your expectations and their roles. Provide a training manual or handbook for reference.

### Step 4 – Communicate the Fund’s Mission and Vision

Build upon the rationale you determined in step 2 by developing a detailed communications plan. Who is your audience? What is your message? How will you get your message to your audience? Some action items to consider under your communications plan include the following:

- A plan for workshops and seminars
- Bulletin/newsletter inserts
- Endowment Fund Sunday
- Representative graphics and visuals
- Brochure and distribution plan
- Bookmark and distribution plan
- Information rack
- “Planned Giving” section on your website