



## **Questions and Answers about the Proposed Merger of Planned Giving & Stewardship Committees**

### **Q: Why are we doing this? What's wrong with the way it's been going?**

A: I've been on the Board for 5 years and we've been talking about this a long time. The way it works now is that two different committees, Planned Giving and Stewardship, are both responsible for fundraising for the Fellowship, but they work separately, communicate separately, and report to different people. It can get confusing, and also it's inefficient.

### **Q: Who will this new Generosity Ministry Team report to?**

A: Currently the Planned Giving Committee reports to the Board, and the Stewardship Committee reports to the Executive Team—our two ministers and our director of finance and operations. After much conversation and also a recommendation from our UU stewardship consultant Mark Ewert from Stewardship for Us, we decided the new Generosity Ministry Team will report to the Executive Team.

### **Q: Why the Executive Team?**

A: Because our Board operates under a type of governance called policy-based governance and the Board sets policies to guide the direction of the Fellowship and monitors the progress towards goals, and also monitors the operations of the Fellowship including the finances. The Board relies on the Executive Team to implement the day-to-day operations of the Fellowship, and that includes the management of the endowment. In fact, for at least a decade, the Planned Giving Committee hasn't actually been involved in any of the investments or management of the Endowment.

### **Q: Is that because of the Common Endowment Fund?**

A: Yep, our endowment is managed by a larger UUA fund that invests in socially responsible investments and does all the detailed management. We'll learn more about that in an upcoming Scroll article!

### **Q: Will members and friends of the Fellowship notice anything different after the elimination of the Planned Giving Committee from the bylaws and the merger to this new Generosity Ministry Team?**

A: No, it's very unlikely that anyone will notice anything different. We will receive information, communication, recruitment and appreciation about the Endowment and the Acorn Society from a committee with a different name, but not much else will change. The Generosity Ministry Team will be able to focus on both short-term fundraising (stewardship) and long-term fundraising (endowment) at the same time.