



Olympic Unitarian Universalist Fellowship



October 22, 2023

Legacy Giving Plan

Mission Statement for the Legacy Giving Committee

To help fund the Olympic Unitarian Universalist Fellowship's vision for the future and ensure the presence of liberal religion on the Olympic Peninsula for future generations.

I. Vision for the Future

- a. How do Board members envision the future of the OUUF?

II. Situation Analysis

- a. Where Are We Now

The Endowment Fund currently contains \$129,730.65 as of October 18, 2023. There are three completed Endowment Society pledge forms and one partially completed pledge form:

1. Carol Hess-Davis (completed)
2. Dr. Jack E. Fletcher, Patricia K.A. Fletcher (completed)
3. Sara Ann Johnson, Walter Lloyd Johnson (completed and included a check for \$84,000 dated 8/23/20)
4. Nick Dante (partially completed)

- b. Where Do We Want to Be

A robust Endowment Fund whose annual earned interest will fully fund the growth and development of the congregation and its ministries.

III. Strategies

The Committee will create a Legacy Giving program that provides a means to inspire, inform, and engage members and friends of the Fellowship to consider a legacy gift.

IV. Tactics to Inspire, Inform, and Engage

- a. **Worship service** to highlight the legacy of the Fellowship and members/friends
- b. **Legacy Giving printed collateral materials and website link** to convey key messages and engage members/friends
- c. **Annual Legacy Award** to honor a member who has made significant contributions to the Fellowship through service, leadership, and/or financial support
- d. **Outreach** to individuals for engagement and giving opportunities

V. Guiding Principles

The Legacy Giving Committee and participants in Legacy Giving will operate in a manner that is transparent to the congregation in terms of managing funds received, respectful to all donors and congregants, honest and ethical in all communications and transactions.

VI. Implementation Calendar

- a. April 2024
 1. Worship service led by Rev. Geoff Rimositis (with talk back so congregation members can receive more information)
 2. Distribution of updated Legacy Giving brochure
 3. Legacy Giving program added to website
- b. November 2024
 1. The recipient of the 2024 Annual Legacy Award to be announced at annual congregational meeting – (An article will also be published in the newsletter and on the website)
- c. TBD – outreach to individuals

VII. Budget – TBD

VIII. Measures of Success

The overall success will be measured by the following criteria:

- a. Successful completion of the tactical plan
- b. Congregational awareness of the Legacy Giving Program
- c. Increased pledges to the Endowment Fund