

FUSD ANNUAL COMMITTEE PLANNING FORM

COMMITTEE NAME	Endowment Committee	DATE: 1/05/2025
PURPOSE: Why do we exist?	Per the bylaws, the Endowment Committee recruits applications, facilitates a review process, and makes funding recommendations to the Congregation for projects that enhance the mission of FUSD apart from the general operating fund of the congregation.	
OUR OBJECTIVES: What key things must happen to accomplish our purpose?	Our objective is present a high quality slate of projects to the Congregation that enhance the mission and facilities of our community.	
KEY STRATEGIES: What things must we do to meet our objectives? What, How, How much. How often.	<ul style="list-style-type: none"> ● Educate the congregation on the existence and purpose of the endowment ● Design an annual application and work with Treasurer determine annual budget ● Conduct congregation wide outreach to recruit quality projects ● Review all applications and make funding determinations ● Make funding recommendations to the Congregation ● Conduct follow-up with all selected and non-selected entities 	
KEY CONCERNS: What problems will we face? What issues must we mitigate to accomplish our purpose?	<ul style="list-style-type: none"> ● Per the bylaws, there are set parameters for the endowment fund and our committee must navigate questions of fit, alignment, and meaning in making recommendations ● The congregation is still learning about the endowment, so outreach and engagement is necessary to ensure we get a host of quality applicants. Not every committee or member is plugged in to realize this resource, or thinking about it year-round. ● Sometimes individual members have big well-intentioned ideas that we need to ensure are feasible and practical. 	
EXCITEMENT: What passion do we bring to this effort? What is it that motivates us to undertake this adventure?	<ul style="list-style-type: none"> ● Supporting creative projects that bring vitality to our community is a very rewarding part of serving on the committee. ● We help fill needs that would otherwise go unmet. ● The committee helps the congregation realize it's dreams and make things possible. ● It's a very tangible way of supporting the mission of FUSD. 	
MEASURES: How will we know we succeeded?	<ul style="list-style-type: none"> ● We will receive a number of diverse applications for projects indicating we have succeeded in our community outreach and engagement efforts. ● We will have spent the annual budget available on high quality projects that once completed will continue to bring value to our community. 	
INTERCONNECTION: What other committees do we interconnect with?	<ul style="list-style-type: none"> ● All! We conduct outreach to all committees to solicit their ideas and applications for projects. ● We also consult all committees when we receive applications that intersect with our work. Primarily we engage with the Property Management Committee and Music Committee. 	

ROLES & RESPONSIBILITIES: Who does what on the committee?	Role	Responsibilities
	Chair/Co-chair	Facilitate meetings, make agendas, take notes, follow up on action items
	All Others	Conduct outreach, answer questions, participate in the application review process to evaluate all projects, make funding recommendations to Congregation
	Treasurer	Tracks the spending, and sets the budget for the year