Your leadership has established or is establishing a legacy program or society. Your executive director is committed to marketing your legacy society. You can identify prospects who are devoted to your mission and want to preserve it for future generations. Board members are willing to include your organization in their will, trust, or retirement fund. Contact Micaela Weil at donor@utahcf.org, call us at 801-559-3005, or visit our website utahcf.org.

Your organization has been in existence for several years and has been effectively carrying out your mission since its founding.

Mission

- Your organization has been in existence for several years and has been effectively carrying out your mission since its founding

Leadership

- Your leadership can articulate a case for preserving your mission for the future
- Your organization is not experiencing severe financial crisis or upheaval in leadership
- You have volunteer leaders and staff who are willing to be endowment ambassadors

Donor Base

- Your organization has a solid donor base of individuals who have consistently given for at least five years
- One or more prospective donors are identified to establish the endowment with current assets or you have reserves to seed the endowment now

Growing the Endowment through Future Gifts

- Your leadership has established or is establishing a legacy program or society
- Your executive director is committed to marketing your legacy society
- You can identify prospects who are devoted to your mission and want to preserve it for future generations
- Board members are willing to include your organization in their will, trust, or retirement fund

If you feel your organization is ready, consider the following:

- What will the endowment purpose be (how will the money be used?)
- What size endowment will achieve your goals?
- How will you promote and market the endowment?
- What roles will staff on volunteer leadership play in endowment building?
- What types of gifts will the endowment accept?

Checklist courtesy of Rose Community Foundation

Interested in starting an agency endowment for your organizations? Contact Micaela Weil at donor@utahcf.org, call us at 801-559-3005, or visit our website utahcf.org.