

YOUR ORGANIZATION'S READINESS CHECKLIST



Use this tool to determine your organization's readiness for an endowment. *If you check several of these boxes, it may be a good time to contact CFU to learn more about endowments.*

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 (what will the funds accomplish?)
- What size endowment will achieve your goals?
- How will you promote and market the endowment?
- What roles will staff or volunteer leadership play in endowment building?
- What types of gifts will the endowment accept?

Checklist courtesy of Rose Community Foundation

INTERESTED IN STARTING AN
ENDOWMENT FOR YOUR ORGANIZATION?

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