



Is your organization ready to start an endowment?

Launching an endowment campaign requires commitment on the part of the organization's staff and leadership. To determine if your organization is ready to start an endowment, answer these questions.

1. What will the endowment purpose be (how will the money be used)?
2. Will an endowment benefit your mission and be relevant for future generations?
3. What size endowment will achieve your goals?
4. How will you promote and market the endowment?
5. What roles will staff and lay leadership play in endowment building?
6. What types of gifts will you accept?
7. Who will manage the administration, investment and distribution of the endowment?

Readiness checklist

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 the future.
- Your organization is not experiencing severe financial crisis or upheaval in leadership.
- You have lay leaders and staff who are willing to solicit endowment gifts.

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.

Development Plan

- You have a development plan and staff is committed to integrating endowment building and planned giving into the plan.
- If there has been a recent change of leadership, the new executive director and development personnel are committed to maintaining relationships with your donors.

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 have the resources to leave a bequest to your organization.
- Many lay leaders and staff are willing to include your organization in their own estate plans.

Philanthropic Services at Rose Community Foundation

Rose Community Foundation assists nonprofit organizations with building long-term strength and sustainability through endowment programs and services. We manage endowment funds and train a wide range of organizations in how to grow their endowments through future gifts. Our philanthropic services team is available any time to help you get started.

TAKE THE NEXT STEP

Contact Vicki Dansky, senior gift planning officer, at 303.398.7422 or vdansky@rcfdenver.org.
To learn more, visit rcfdenver.org.