



Nonprofit Endowment Cohort September 2020 – May 2021

Rose Community Foundation’s Nonprofit Endowment Cohort (NEC) is a nine-month program providing training, individual coaching and a \$10,000 match to help organizations launch an endowment fund and build the internal capacity to grow that fund over time. The curriculum provides the tools your organization needs to integrate legacy giving and endowment building into your development work and organizational culture.

Through the NEC, your team will learn to identify the best prospects for endowment and legacy gifts and how to make those asks; learn practical and easy-to-implement marketing and stewardship practices; and discuss the policies that help to grow an endowment fund. The program brings together staff and volunteer leaders from organizations throughout the nonprofit sector, providing a platform for shared learning and a network of peers.

Through 20 years of helping organizations establish and grow endowment funds, we have seen the transformational impact of legacy gifts and the financial stability that nonprofits experience from annual endowment distributions. We look forward to supporting you in these efforts.

Schedule

Nonprofit Endowment Cohort sessions will be held from 11:30 a.m.– 1:00 p.m. via Zoom

Sept. - Oct. 2020	Individual Board Presentations: Introduction to Endowments and Planned Giving
Oct. 22, 2020	Nonprofit Endowment Cohort Orientation Introduction to Integrated Development Plan
Nov. 19, 2020	Gifts that Build Endowments
Dec. 2020	Individual Coaching
Jan. 21, 2021	Making the Ask for Endowment and Legacy
Feb. 18, 2021	Marketing, Communications and Donor Stewardship
Mar. 11, 2021	Gift Acceptance and Endowment Building Policies
Apr. 2021	Individual Coaching
May 20, 2021	Presentations: How to Sustain your Momentum and Stay on Track
Jun. 2021	Nonprofit Endowment Cohort Year End Celebration

Checklist for Participation

Before the program begins:

- Have a conversation with Amelia Fink, Director of Nonprofit Funds and Endowments, afink@rcfdenver.org, to see if this program is the right fit for your organization.

If it is, great! Let's get started:

- Determine who will represent your organization at the trainings: At least one staff member (i.e. Executive Director, Director of Development) and one board member must commit to attending each session. If there are additional people from your organization who would like to participate, they are welcome.
- Sign and submit three documents: Nonprofit Endowment Fund Agreement, Nonprofit Endowment Fund Guidelines, and Nonprofit Endowment Cohort Requirements and Participants
- Rose Community Foundation will reach out to schedule a board presentation for September or October 2020. This ensures your board understands the important step you are taking toward sustainability by opening an endowment fund, the purpose and goals of the program, and the services provided by Rose Community Foundation.

During the program:

- Open your endowment fund with an initial contribution of at least \$10,000 by December 31, 2020. When that contribution has been made, Rose Community Foundation will provide the initial match of \$5,000.
- Using the provided template, draft a plan that integrates endowment building and planned giving into your organization's development work. This plan will include a prospect portfolio, marketing and stewardship strategies, gift acceptance and endowment policies and an implementation timeline.
- Before the final session (May 20, 2021), make the second contribution (\$5,000) into your endowment fund. Rose Community Foundation will deposit the second match of \$5,000 to reach the endowment fund minimum of \$25,000.

As alumni of the program:

Rose Community Foundation remains committed to supporting your efforts in growing your endowment fund over time. We provide professional development opportunities, one-on-one meetings, and board presentations to help your organization sustain the momentum and continue to grow your fund.

For more information

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