

Endowment Building Toolkit

This Endowment Building Toolkit is both a training program and a resource designed to build the confidence of participants to intentionally and enthusiastically grow your organization's community foundation endowment to sustain your mission forever.

WE CAN HELP YOU BETTER EXPLAIN THE VALUE OF ENDOWMENT AND LEGACY GIVING.

Our experience shows that many people do not understand how endowments and legacy or planned gifts work. This program allows us to coach your team on the tools, language and steps to take to gain confidence in growing your sustainability.

WE CAN HELP IN THE DETAILS. MAXIMIZE OUR EXPERIENCE IN PHILANTHROPY.

Designed for staff, board members and volunteers, the Endowment Building Toolkit equips nonprofit leaders to educate others about the mission, accomplishments and needs of the organization. The training focuses on three key areas:

- 1. Endowments: Why you need one, how they work and the strategies you need to know to grow yours**
- 2. Your organization's story and how to tell it**
- 3. Role play, practice and Q&A sessions**

You'll receive valuable tools for endowment building, including marketing materials, sample letters and presentations, as well as demonstration and practice opportunities. You'll also receive the support and mentorship of the Community Foundation's professional staff to guide you through the planned giving and endowment building process.

This program is effective in helping nonprofits to build endowments through both current and legacy gifts.

To learn more, contact the Community Foundation of Greater Fort Wayne.



The endowment building toolkit can meet the needs of every organization and is available exclusively to nonprofits who have endowments held at the Community Foundation.

Please see pricing and program offers on additional sheet.

Toolkit Levels

A program offered by the Community Foundation of Greater Fort Wayne to help the nonprofit community grow in sustainability.

BASIC/WHEN YOU OPEN A FUND

- 20% match on all gifts into the fund up to \$10k per calendar year
- Back office management of gifts, acknowledgments, reporting, etc.
- Unrestricted access to the online portal to see all gifts into the funds and fund statements
- Basic language on planned giving to incorporate in print and digital materials
- Free process of stock gifts into the fund and help with facilitation of other planned gifts
- Promotion in the 'Gifts from the Heart' end-of-year mailing
- Monthly fund statements
- Professional investment team and access to national investment advisors

LEVEL 1 SUPPORT - \$1,000

- Everything included in the Basic level of support
- Endowment Team Building – A facilitator from CFGFW works in consultation with the executive director or board chair to design and implement an overall endowment building campaign strategy and set forth a plan for donor visits. The goal of Endowment Team Building is to provide support and assistance to the endowment building campaign leaders.
- Endowment Building Workshop – A two-hour course for staff, board members or volunteers. The goal of the workshop is to prepare individuals to make donor visits.
- Templates for donor materials

LEVEL 2 SUPPORT - \$2,000

- Everything included in Level 1 Support
- CFGFW personnel assistance with donor tracking and benchmarking
- Personalized Wealth Engine screening for Top 20 prospective donors
- Writing, editing and design of donor materials including:
 - Case Statement
 - Donor Letter
 - Endowment FAQs

LEVEL 3 SUPPORT - \$2,500

- Everything included in Level 2 Support
- Printing of 500 piece donor materials*
- Mailing of 500 piece donor materials*

**Increased mailing can occur for additional fee*

**Amounts may change from time to time*

Needs Assessment

Thinking about starting an endowment campaign but not sure if your organization is ready? Use the checklist below to determine your readiness.

- Do you have a clearly articulated vision for your organization and a plan to get there?
- Do you have a robust Annual Fund and/or Membership?
- Is the organization otherwise financially healthy with a plan for the future?
- What is the status of internal and external leadership?
- Is a campaign right for you or should you take advantage of other endowment building strategies?
- Are your loyal major donors educated and cultivated?
- Do you have an active and engaged Board and/or Executive Director that is ready to give and to ask?*
- Is growing the sustainability of your organization a top philanthropic priority for your donors?
- Does the Board perceive long-term sustainability as a fiduciary duty?
- Do senior leadership and volunteers believe that an endowment campaign will succeed?
- Do you have a strong campaign committee?
- Is the organization prepared to invest in the resources needed to make the campaign a success?
- Do you have realistic, measurable and achievable goals?*
- Do you have a compelling case for support for an endowment campaign?*

OTHER CAMPAIGN NEEDS:

Gift pyramid* | Gift acceptance policies* | Recognition/Naming Opportunities* | Collateral materials*

Volunteer training materials* | Technology needs

Only have a few boxes checked? You may need some help. Feel free to give us a call! We are happy to talk through any of your questions so that you can prepare to grow in your sustainability for the future!

**Our Endowment Building Toolkit may be able to help you with this. Ask us how!*