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 (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 | visit our website utahcf.org.