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?

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**Checklist courtesy of Rose Community Foundation**

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**INTERESTED IN STARTING AN AGENCY ENDOWMENT FOR YOUR ORGANIZATION?**

Contact Derek Nunner at derek@utahcf.org

Call us at 801-559-3005 | Visit our website utahcf.org.