

CCCF HELPS YOUR NONPROFIT **GROW** ITS ENDOWMENT FUND

Why a nonprofit endowment?

- Ongoing, dependable annual payout
 - Key to sustainability
- Demonstrate donor/community belief in overall mission, impact & stewardship
- Planned giving always happens. Large nonprofits historically benefit. Mid-sized nonprofits should, too.



#7 PLANNED GIFT ADMINISTRATION

- **Bequest** language
- **IRA** acquisition and fund administration
- **Charitable Gift Annuities** projections and calculations of income that beneficiaries can expect; contracting; payouts
- **Charitable Remainder Trusts** or **Charitable Lead Trusts** acquisition and fund administration
- **Life insurance** gift processing
- **Real estate** gift processing

#6 HELP IMPLEMENT

- **Planned Giving case statement & materials** review & feedback
- **Prospect research rating**
- **Professional advisor outreach**
- **Speakers:** planned giving/leave a legacy motivation, values, options, opportunities
- **Cultivation planning**
- **1:1 meeting practice**
- **Meeting follow up**
- **Planned gift stewardship**

#5 CAPACITY BUILDING GRANTS

- **CCCF Fund for Chester County grants** to strengthen nonprofit capacity (planning, fundraising, management, governance, etc.)

#1 EVALUATE & PLAN

- **Assess organizational readiness** for planned giving & endowment building
- **Create CCCF NPO Endowed Fund** when ready
- **Planned giving framework:** endowment building & planned giving goals, process, prospect research, timelines
- **Annual check-in meeting** with Board & senior staff

#2 PUBLICITY

- **Nonprofit Endowment** at CCCF
- **CCCF annual report** listing
- **CCCF web site listing**, with dedicated Endowment Fund page & donation link
- **Brochure:** initial draft + 100 color copies
- **Electronic ads** promoting planned gifts, to insert on npo website & newsletter
- **Site visit** priority candidate for Smart Giving Series

#3 TRAINING

- **Attracting Endowed & Planned Gifts:** capacity building workshops...monthly
- **Peer Learning Circles** for nonprofit staff & board members ...quarterly
- **Board of Trustees Institute:** meet, greet, network & learn...annually each autumn
- **Online resources...**'best of' links @ www.chescocf.org Resources
- **Delaware Valley training...**Planned Giving Day, Partnership for Planned Giving, LaSalle Nonprofit Center, AFP @ www.chescocf.org Resources



#4 COACHING/CONSULTING

- **1:1 coaching** by Community Foundation staff
- **Nonprofit Resource Expo:** meet, greet & sample trainers & consultants...annually each June
- **Chester County Consultants Collaborative & other consultants...**www.chescocf.org Resources page

CCCF HELPS YOUR NONPROFIT **MANAGE** ITS ENDOWMENT FUND

- Gift processing, posting
- Gift deposits
- Grant & program disbursements
- Investment manager fee posting
- Fund reconciliation / rectification transfers
- Pledge reminders
- Fund accounting report generation

ACCOUNTING



- Investment policy formulation
- Investment manager: select, monitor, hire, fire
- Asset & sub-asset allocation
- Long-term & short-term policy ranges
- Pooled invested assets w/separate accounting
- Investment return postings
- Tracking, benchmarking, best practices

INVESTMENT



- Contribution receipts for IRS compliance
 - Annual audit
 - Annual IRS990 filing

COMPLIANCE

