



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.





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.

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

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

Coaching/ Consulting

- **1:1 coaching** by Community Foundation staff
- **Chester County Consultants Collaborative & other consultants...**
www.chescocf.org Resources page

Capacity Building Grants

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

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**

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



CCCF HELPS YOUR NONPROFIT MANAGE ITS ENDOWMENT FUND

ACCOUNTING, INVESTMENT, & COMPLIANCE



ACCOUNTING

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

INVESTMENT

- 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

COMPLIANCE

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

