



COUNCIL *on* FOUNDATIONS

Leveraging Nonprofits as Endowment Builders

**Engaging nonprofits for donor connectivity
and growing their own endowments**

June 14, 2016

Agenda

- Introductions
- Housekeeping Items
- Leverage nonprofit partners for donor outreach
- Empowering nonprofits to grow endowments
- Implement an endowment building strategy
- Q&A

***These slides are designed to be used
as a discussion tool with your Boards!***

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Thank you for joining us. The webinar will begin shortly!



Moderator:

Brad Ward

Director, Community
Philanthropy | Council
on Foundations



Presenter:

Helen Monroe

CEO | Endowment
Development Institute



Leveraging Nonprofits for Donor Outreach...

- Donor Engagement
 - Donor Stewardship
 - Donor Experiences
 - Endowment Building
 - Community Intelligence
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- How can nonprofits increase assets, but not add more work to an already full plate?
- How does it fit in the business model?
- What do you do first?

“Donors may get involved simply because they are under the influence...”

- What pulls at donor heartstrings most?
- Can nonprofits work on your behalf?
- How can nonprofit partners set you apart from commercial funds and competitors?

- What are ways to teach nonprofits what we instinctively know about stewarding donors?
- How do we get nonprofits to do it for us?
 - What incentivizes them to make it stick?
 - Beyond grants, what motivates the nonprofits?

- We know donors respond more favorably when they know the difference being made
 - How can nonprofits share the story of impact that helps donors relate?
 - What donor experiences work best to deepen donor commitments?

- How is managing nonprofits any different than DAFs or fund founders?
- Why is gaining trust important?
- Who needs your attention?

- Are you building story tellers to grow giving?
- How can these stories add to your own database and communications work?
- How can you streamline and strengthen your own work through the nonprofits?



Engaging Nonprofits as Endowment Builders

- Making the case
 - Overcoming the obstacles
 - Strategies for engaging nonprofits
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- What can CFs offer that mobilizes nonprofits to talk about legacy gifts?
- What opportunities are being missed?
- How many nonprofits are thinking long-term?

- You have a lot of donor relationships.
 - How can you add more without adding overhead?
- National charities and universities have huge and ever-growing endowments
 - How do they do it?

- How do you set realistic goals of the # of nonprofit relationships?
- Which nonprofits do you support?
 - How do you decide which ones?
- CFs work well with local advisors.
 - Why should nonprofits?

- Prepare yourself for the work ahead
 - Nonprofit board members change
 - Clarify up front the assets are not “theirs” once in a fund
 - They may request principal, but they cannot make a requirement that they get it just by asking
 - CF board HAS to be involved, vote, and approval
- Balance fundraiser language with legal realities
 - Understand FASB 136 accounting
 - Separate Agency dollars and Donor Designated dollars

- Tools and training
- Matching Grants
- Operational Grants during building phase
- Readiness to build endowments
- Communications tools
- Ongoing and continued support

What more can we explore to help you?



Q&A:

- Questions
- Continue the Dialogue:

The Philanthropy Exchange

exchange.cof.org



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Leveraging Nonprofits as Endowment Builders

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July 27, 2016 | 2:00pm EST

Grantmaking and Economic Development

August 10, 2016 | 2:00pm EST

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