

# Endowment Checklist

## Getting your organization ready to secure your future.

- The Yampa Valley Community Foundation’s Endowment Building Toolkit can provide you with the effective tools you need when you are ready to build your nonprofit organization’s endowment fund and/or encourage planned gifts.
- The Yampa Valley Community Foundation provides downloadable fact sheets, articles and solicitation letters to help you build awareness about how endowment and planned gifts can create a brighter future for your organization.
- Our team is available to provide you with additional program support along the way.

## A checklist to guide your organization to build your endowment.

### 1. Educate and engage your organization’s leadership

- Be certain you can articulate what a strong endowment will do for your mission and future.
- Engage your board and committees with endowment building and legacy giving through a brief presentation. *YVCF staff would be happy to provide this presentation.*

### 2. Communicate the value of endowment building and legacy giving

- Make sample bequest language and your legal name available. Include one-line planned giving messages in your publications and website.
- Print and distribute endowment and planned giving fact sheets at your offices, board and committee meetings and in appropriate mailings
- Include articles about endowment building and planned giving in your publications and website.
- The more your prospective donors see your messages, the more likely they will be to increase their giving. Repetition is key!

### 3. Engage, educate and recognize endowment and legacy donors

- Identify prospective endowment and legacy donors.
- Mail solicitation letters to prospective legacy donors.
- Follow up on the mailings by having your staff and/or volunteers contact the prospective donors. *YVCF staff can provide detailed gift examples and provide contact information for estate and/or financial planners to donors who request assistance.*
- Establish a Legacy Society to recognize and thank your donors. *YVCF can help you through this process.*

**Real generosity toward the future lies in giving all to the present.**

**– Albert Camus**