

Endowment Building Questionnaire

Think through the answers you would give a donor if asked. Mark the questions you can answer, and then check the scoring results at the bottom of the page.

1. Does your organization have an endowment?
2. What is the market value of your endowment?
3. What is the current asset allocation of your endowment?
4. How has that asset allocation changed over the last year with the dramatic changes in the stock market?
5. What was the total return on your endowment last year? (And, what is total return?)
6. What was the total return over the last five years?
7. How do your total returns compare to the blended index return or benchmarks? (And, what is a blended index return or benchmark?)
8. What is the spending policy for your endowment, specifically how is your endowment distribution percentage determined and what is your percentage payout?
9. Are there any restrictions on terms a donor can impose on endowment gifts?
10. Are there any restrictions on the type of assets that can be contributed to your endowment?
11. Who makes decisions about distributions from your endowment?

Number of Questions You Can Answer	Scoring
9-10	Well prepared genius. your donors will be impressed
5-8	Moderately prepared. you will survive the call
3-4	Not good enough. prepare to be humbled
0-2	Please get answers.