



Endowment-building Strategies

The following provides step-by-step strategies you can use to build your endowment with support from your community foundation.

1. Prepare your nonprofits to make an effective appeal.

- Prepare an *"Appeal" Timeline* (Note: *founding* members must be confirmed by 6/30/12.)
- Develop a *Case for Support* to give to your endowment to benefit your organization
- Create a letter inviting donors to become a member of the Legacy Society
- Draft talking points for phone calls to set up face-to-face meetings
- Draft talking points for face-to-face meetings
- Draft talking points for follow-up calls
- Track activities of the cultivation and ask

2. Educate askers about making an effective ask.

A Board Endowment Development Training Presentation is available for your use. Contact PJ Watters if you want a copy of the PowerPoint presentation, which you can modify and use at your convenience or if you wish to participate in a multi-Board training opportunity in early spring 2012. (Suggested date/place: Wednesday, February 29, 2012 in Liberty Lake.)

3. Identify donors to contact

Assign askers (i.e., Board members or influential volunteers) to sign letters and follow up.

4. Invite donors to meet

- A. Write letters introducing Legacy Society
- B. Phone to schedule a time to meet face to face
- C. Meet to explore a planned gift

5. Leave a Legacy

Follow up to confirm bequest or other planned gift

6. Persevere – Participate in Endowment Building meetings over coffee with PJ. Please view *Endowment-building meetings with PJ* document on previous page.