Leveraging Nonprofits as Endowment Builders

Engaging nonprofits for donor connectivity and growing their own endowments

June 14, 2016
Welcome

Agenda

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

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Thank you for joining us. The webinar will begin shortly!
Leveraging nonprofits as endowment builders

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
• 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
• 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?
Overcome the obstacles with nonprofit partners

• 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
Strategies for engaging nonprofit partners

- 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:

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Leveraging Nonprofits as Endowment Builders

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Upcoming Webinars:

Grants Primer | Common Funders Grant App
July 27, 2016 | 2:00pm EST

Grantmaking and Economic Development
August 10, 2016 | 2:00pm EST

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