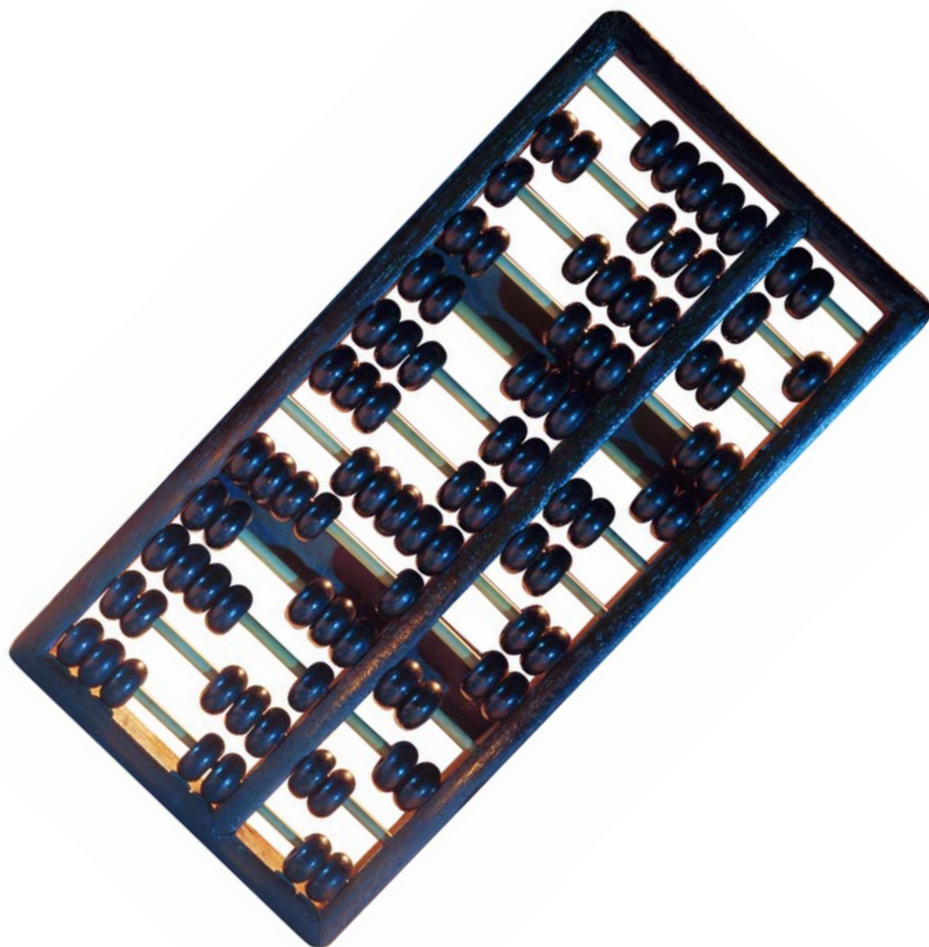


Endowment Building Workshops



*Helping
nonprofit organizations
secure their future.*



Select the Perfect Workshop Option

Developing an effective endowment building program is important for all nonprofit organizations. Securing an organization's future through a permanent source of income is not only sound long-term planning, but also provides peace of mind and appeals to donors.

Endowment Development Consultants (EDC) offers a proven workshop in endowment building and development for nonprofit organizations.

Your foundation may offer:

■ A one-time Overview Workshop (A)

This is a half-day workshop that helps organizations assess their readiness for building endowments and provides a general introduction to the key elements of endowment building.

■ Endowment Building Workshops Series (B)

The workshop series provides comprehensive insights, knowledge, and training. Packed with information and ready to use tools, the workshops offer optimum support for each organization's needs.

■ Optional Technical Assistance

In conjunction with workshops, selected nonprofit organizations receive support for their development and endowment building efforts. Technical assistance is available for personal visits with staff and board members or for "on-call" tele-phone support.

Two options are available to assist nonprofit organizations in their endowment building efforts: on-site consulting and telephone support. Both options provide further training and support for continued proficiency and success.

A

An Overview Workshop

- ⇒ Review of endowment building blocks
- ⇒ Endowment readiness review

An EDC consultant presents all workshops. Scheduling is flexible and nonprofit organizations will benefit no matter what their level of endowment activity.

This workshop provides an overview on endowment building, including key development strategies and the elements of a successful endowment program. Participants will gain an understanding of general endowment building elements. Ideal for nonprofits that have an existing endowment fund and want to grow their endowment and those who are planning their endowment program, this workshop offers information for organizations at varying levels of endowment development.

During the workshop, participants will assess their organization's readiness for endowment building and review key criteria for a strong endowment building program. Participants receive an endowment readiness questionnaire and guidelines, questions and answers about endowments, and essential information to guide them in endowment planning.

**Plus Your Choice of
Optional Technical Assistance**

Technical Assistance

■ Option One: On-Site Consulting

This option provides consulting support to eight nonprofit organizations during the 3 days immediately following a workshop. Each organization receives a two-hour consulting meeting that focuses on guiding the organization in their endowment planning and development activities and a follow-up report.

A consultant will work with your foundation to develop a specific technical assistance program for nonprofits in the community.

■ Option Two: On-Call Support

Each selected nonprofit organization benefits from telephone support sessions. Consultants help with donor development issues or endowment building strategies and answer general questions.

B

Endowment Building In-Depth Workshops

- ⇒ **Comprehensive coverage**
- ⇒ **Applied knowledge**

The Workshop Series provides participants with applied knowledge and comprehensive training. The workshop is designed to help nonprofit organizations gain the capacity to start or grow an endowment fund.

This in-depth series is offered in a four-session format and provides training of broad scope and significant depth in key areas such as endowment building, donor identification, and investment philosophy and policy.

For the most effective training and best results, each participating organization should send at least one staff person and one volunteer or board member to attend the training. Each organization receives two comprehensive endowment-building manuals and sample materials to use for their development efforts.

On the day of each workshop, the consultant can meet with your foundation's staff or board committee for two hours to provide support and guidance for the nonprofit endowment-building program.

The fee for all workshops includes the workshop, materials for participants, and all of the consultant's travel expenses. Please note that meeting room charges and meals are not included.

**Plus Your Choice of
Optional Technical Assistance**

What Participants Have To Say:

"This seminar was helpful to get an understanding of where to start, who may be candidates, what an endowment is and I enjoyed starting relationships with others in the county. Thank you so much!"

"...very helpful in giving direction for planning and evaluation of current status"

"Overall education experience for me was a new and better understanding of endowments and different approaches."

Contact us today (760) 631-7200

Workshop Series

TOPICS COVERED IN EACH SESSION INCLUDE:

Session 1

- **Endowments, are you ready?**
Should all organizations have an endowment?
Organizational steps to consider.
- **Donor Identification**
Why do people make major gifts?
Who are prime endowment givers &
Where do you find such people?
- **Donor Cultivation/Preparation**
Suspects vs. Prospects. Building donor relationships.

Session 2

- **Donor Solicitation**
You have got to ask!
The face-to-face visit. Anatomy of an ask.
- **Ethics in Endowment Development**
Conflict of interest. Confidentiality.
- **Donor Recognition & Retention**
What is a Heritage Club, 21st Century Club,
Legacy Society?
The importance of continued contact.

Session 3

- **Planned Giving—Wills**
Making your case for planned giving.
- **Planned Giving—Trusts**
Win-Win-Win case studies.
- **Planned Giving—Life Insurance, Real Estate, Personal Property**
How to offer more ways for donors to achieve their philanthropic goals. Tax benefits.

Session 4

- **Working with Professional Advisors**
Why are they important?
Challenges to and suggestions for success.
- **Investment Philosophy and Policy**
IPS—what is it? Do you need one?
Total return concept, spending policy.
- **Working with Investment Managers**
Search and selection process.
How to evaluate performance.

Endowment Building Workshops At A Glance

Customized Solutions That Fit

	2008	Overview Workshop	Workshop Series	Technical Assistance Program
Time Frame:		Half Day	4 Half Days	2 hour meeting with participating nonprofits
Content:		Introductory overview	Comprehensive Endowment Building Program	Individualized consulting sessions
Suggested participants:		Staff members, board members and volunteers (Max 25)	One staff member and one board member or volunteer	Staff and/or board members
Total fee includes:		Materials and consulting expenses	Materials and consulting expenses	Pre-meeting assessment, 2 hour meeting, and detailed follow-up report
Total fee		\$5,000	\$19,750	\$3,000 for 4 nonprofits \$6,000 for 8 nonprofits <i>(All consulting sessions must occur in conjunction with scheduled workshops)</i>
On-Call Support Option		\$2,400 Includes 12 months of telephone support for all participating nonprofits	\$2,400 Includes 12 months of telephone support for all participating nonprofits	\$2,400 Includes 12 months of telephone support for all participating nonprofits

For questions or to speak with a consultant, please contact us today!



Endowment Development
CONSULTANTS

Tel (760) 631-7200 E-mail: info@endowment.com www.endowment.com



- Expertise:** EDC is a leading specialist in the development and management of charitable organizations throughout the United States
- Demonstrated Growth:** EDC has modeled four statewide initiatives with significant private foundation funding to raise over \$1.5 billion in new philanthropic assets
- Experience:** EDC's knowledge base consists of over 25 years of hands-on management, planning, and training experience for philanthropic organizations
- Success:** EDC has successfully served over 200 community foundations in the United States plus work in Canada, England and Poland