

Nonprofit Endowment Building Challenge Application

Submit completed applications to Kelly Anoe at kanoe@legacyfdn.org by March 1, 2019. www.legacyfdn.org // (219) 736-1880

Organization Information

Legal Name of Organization: _____

EIN: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Name of Proposal Contact: _____

Title: _____

E-mail: _____ Phone: _____

Do you have an existing endowment fund at Legacy Foundation? Yes No

Do you have an existing endowment fund anywhere other than Legacy Foundation? Yes No

Organization fundraising goal for endowment (not including match): \$ _____

Describe the strategies and tactics you will use to promote your organization, diversify your funding stream, reach new donors, and increase giving from current donors.

Indicate how your organization determined the financial goal for this endowment campaign. Include a description of endowment fundraising strategies both during the campaign and after the endowment has been established.

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Organization Readiness Assessment

This checklist is intended to help organizations determine their readiness to participate. Please answer honestly, “No” responses do not necessarily mean your organization is ineligible, but may show areas where improvement is needed. Please be prepared to provide more information that would substantiate responses, if requested.

	Yes	No
Does your organization have a clearly stated mission?		
Does your organization have a current strategic plan that has been approved by the Board of Directors?		
Do you have adequate funds in your budget to support your operational budget?		
Has your organization operated with a balanced budget the past 3 years?		
Does your organization have multiple and varied funding sources?		
Does your organization have a written policy for internal financial controls?		
Does your organization have an external audit or review annually?		
Is your organization free from major/numerous leadership changes in the past year?		
Does your organization have all your board positions filled, per your by-laws?		
Did your organization have quorum at all regularly scheduled board meetings over the past 12 months?		
Is your organization committed to taking on the additional time and expense of an endowment building campaign?		
Do board and staff have clearly defined roles in this campaign?		
Does your organization have a conflict of interest policy that is reviewed and signed by all board and staff?		
Does your organization prohibit board members from receiving compensation from the organization?		
Does your organization have a fundraising plan?		
Does your organization have a successful track record raising money from individuals?		
Is the organization’s board engaged in fund development?		
Are there specific staff persons that have been assigned and trained to coordinate and implement the endowment campaign?		
Does your organization keep a database of past and prospective donors?		

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