



Nonprofit Partnership Packet Table of Contents:

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Introducing
Endow San Diego

The San Diego Foundation was founded in 1975. Its purpose is to improve the quality of life in all of our communities by promoting and increasing responsible and effective philanthropy. In order to achieve this we have a four-part mission – the primary element is our role in assisting individuals to build and **preserve enduring** assets for charitable purposes in our region.

With this aspect of our mission in mind, we determined that our 30th Anniversary provides the perfect platform to launch a county-wide, multi-year endowment building effort entitled ***Endow San Diego***. Through significant partnerships with QUALCOMM and KPBS we will create a movement. Such a movement will educate citizens about the importance of endowments and inspire them to increase their current and future charitable contributions for the betterment of the San Diego region.

In a recent survey of area non-profits, we learned that over 70% of responding organizations do not have endowments and an even greater percent of these organizations have no formal planned giving program. Coming out of a challenging economic period, area non-profits have been recently reminded of the critical buffer that an adequate endowment can provide against fluctuations in financial support. They are ready for the challenge, but do not necessarily have all the internal resources and expertise required. Data from our survey and anecdotal experience tell us there is not only an opportunity to assist the non-profits in their efforts, but also a duty. Thus, we have created the **Nonprofit Partnership Program of *Endow San Diego***.



Nonprofit's Frequently Asked Questions
regarding the
Nonprofit Partnership Program of Endow San Diego
September 2005

Who can participate?

Participating nonprofit organizations must meet the program's partnership requirements, which include having a strong commitment to endowment and a signed board resolution confirming this commitment.

What's in it for The Foundation?

Our endowments will increase, as will endowments at other organizations. This new initiative supports our mission of building and preserving assets for the nonprofit community.

Does our endowment have to be at The Foundation?

No. It is up to the donor and then each organization. This is a multi-year, regional initiative to perpetuate endowments that are truly permanent, regardless of where they reside.

How does the San Diego Foundation define "endowment"?

"A gift permanently set aside and invested by a charity with only the income used for charitable purposes."

Will this program diminish our existing fundraising efforts?

No. This program is designed to augment your existing efforts. Through a regional promotional campaign, focused on informing and inspiring individuals regarding the principles and benefits of endowment, your organization's fundraising efforts will be multiplied. Technical support and tools provided to you as a partner will increase the expertise and scope of your development staff.

Will this effort take away our existing donors?

No. The thrust of this promotional campaign is to get people to create endowments without directing them to a specific organization or cause. This effort is not intended to interfere with existing relationships. On the contrary, it will support the strong relationships you currently enjoy with your donors.



Nonprofit Partnership Requirements

Mission:

The San Diego Foundation's mission is:

- To assist donors and nonprofit organizations to build and preserve enduring assets or charitable purposes in all our communities,
- To monitor and assess changing needs,
- To meet those needs through financial awards and organizational support, and
- To convene members of the community to promote creative dialogue on issues affecting all of our communities.

Endow San Diego is a regional, multi-year initiative designed to build permanent endowments for the citizens and organizations committed to improving the quality of life in all our communities. The goals are:

1. To increase the short term and long term capacity of planned giving programs in our area nonprofit organizations.
2. To increase awareness of endowments and raise community endowment dollars, unrestricted, and field of interest dollars dedicated to sustain, maintain and provide support to community needs.
3. To increase endowments to support community non-profits.
4. Raise awareness of the importance of endowments through joint communication with nonprofits.
5. Involve thousands of new donors and initiate the serious cultivation of many thousands more.
6. To expand and enhance the role of volunteers in endowment building activities.
7. Measure bottom line impact and report to Endow San Diego Initiative investors

As a partner in *Endow San Diego's* Nonprofit Partnership Program, guidelines are provided to move towards the common goal of increasing endowments in the San Diego Region between now and the end of 2007.

Requirements for Participation

Nonprofit partner will:

1. Have been incorporated a minimum of 5 years ago and currently operating as a government approved charitable organization; be affiliated with The San Diego Foundation via a fund or supporting organization; or be approved by The Foundation Board of Governors.
2. Make and demonstrate a commitment to endowment with:
 - Signed commitment form and
 - Signed Board Resolution and
 - Implementation of policies & procedures designed to preserve and protect endowment in perpetuity and
 - Establishment of specific organizational endowment goals
3. Abide by the National Committee on Planned Giving's Model Standards of Practice (http://www.ncpg.org/ethics_standards/model_stds.asp?section=7)
4. Report progress timely and in a format provided
5. Incorporate high level staff and board participation in nonprofit forums, showing collaboration and idea sharing with colleagues
6. Schedule periodic *Endow San Diego* presentations to update your board on the progress of Endow San Diego
7. Share success stories and unique gift stories for use in newsletters and websites
8. Develop and implement a budget to support a planned giving program. (If not existing.)

The San Diego Foundation will provide:

1. Tools and information to encourage endowment building success (including collateral materials, ads, articles, etc.) for organization's customization, printing and distribution/use
2. Technical support for planned gifts, as necessary
3. Quarterly communications
4. Results of how the efforts impact the region
5. Forums to discuss ideas, progress, and strategies
6. Visibility for NPO partners through various co-branding opportunities (i.e. website links, acknowledgement at Anniversary celebration event, listings as applicable)
7. Logos/artwork for co-branding opportunities
8. A special partner listserve for peer-to-peer assistance/counsel



ENDOW SAN DIEGO
Nonprofit Partnership Commitment Form

Endow San Diego is a regional, multi-year initiative designed to:

1. Increase awareness of endowments and raise community endowment dollars ~ unrestricted, field of interest, and organization specific.
2. Raise awareness of the importance of endowments through joint communication with nonprofits.
3. Involve thousands of new donors and initiate the serious cultivation of many thousands more.
4. Expand and enhance the role of volunteers in endowment-building activities.
5. Track results of activities within the nonprofit community.

As a partner in *Endow San Diego*, _____ commits to:
(Name of Organization)

1. Abiding by the definition of endowment as a permanent fund
2. Reporting progress timely and in the format provided
3. Providing for staff and board leadership participation
4. Coordinating periodic presentations to organization's board
5. Sharing success stories and unique gift stories for use in various media opportunities.

The San Diego Foundation will provide:

1. Technical support for planned giving
2. Regular electronic communications
3. A Planned Giving Tool kit (including forms, collateral materials, ads, articles, etc.)
4. Reports on how the initiative affects the region
5. Training sessions in specific topics of interest (i.e. fundraising, marketing, financial mgmt.)
6. Forums to discuss ideas, progress, and strategies
7. A comprehensive advertising and marketing campaign supporting Endow San Diego.

Partner Organization ~ Executive Director

The San Diego Foundation

For more information on program participation, please contact Paul Thompson at 619-814-1364

NPO logo

Sample Board Resolution

Endow San Diego

WHEREAS, it is the purpose of _____ to
(Name of Organization)
_____; and
(Mission of Organization)

WHEREAS, _____ is committed to raising awareness regarding
(Name of Organization)
the importance of endowment and inspiring donors to support endowment, and

WHEREAS, _____ plans to participate in The San Diego
(Name of Organization)
Foundation's regional, multi-year initiative ~ *Endow San Diego* ~ as a Nonprofit Partner; and

NOW, THEREFORE, BE IT RESOLVED that _____ will
(Name of Organization)
provide all resources and information necessary to meet the established criteria for initial and
continuing participation in this program.

I certify that the foregoing is a true and correct copy of the resolution duly adopted by
_____ on the _____ day of _____, in the year
_____, and that the same now appears of record in its official minutes.

By: _____ Date: _____
Chair, Board of Governors for _____

ATTEST:

Secretary, Board of Governors for _____