
HOW TO TALK TO (POTENTIAL) DONORS

Casual encounter

- *Did you know I serve on the _____ Community Foundation Board? We've been making grants in the community since _____.*
- *Have a grant story ready to share: Recently we granted to _____ (well-loved community charity like library or senior center) to fund their _____.*
- *I appreciate serving on this board because... (ex. we are able to use donations from local people to help meet local needs.)*

Someone thinking about opening a fund or leaving a legacy fund

- First conversation goals are simple—be sure to take notes to show that you're really listening.
- Ask about their charitable interests. Find out what matters to them – youth, education, the arts, social services, healthcare, etc.
- Grants may be made to any qualifying charitable programs clarified as 501 (c) (3); educational institution, faith-based organization, city or county government.
- Is the person thinking about a gift now, or a planned gift in their estate? Or possibly both—open a fund and be the advisor and then add to it from estate. An easy option is to make the foundation a beneficiary on your life insurance or an invested asset (i.e. IRA at Edward Jones).
- Explain that CKCF and your affiliate will work with them to create an MOU that preserves their gift and intentions.
- \$10,000 is needed to open a fund.

As appropriate share this info

- Make sure they know that your local foundation is an affiliate of CKCF, which meets National Accreditation of Community Foundations' rigorous standard.
- If a specific designation for distributions isn't named, decisions for granting from the fund could be made by a relative or by the affiliate board depending on how the MOU is written.
- The donor may choose to be anonymous—CKCF and the affiliate board will protect their anonymity.

It's natural that a potential donor would need to check with their accountant or attorney—get back with them after they gather information about, say tax advantage.

Follow-up

- Direct them to the CKCF website (or if appropriate, print copies for them) to look at the Fee Schedule, Annual Report, and Investment Performance.
 - [Primary & Independent Investment Manager Policy](#)
 - [Inspirational Donor Stories](#)
- If the person is ready to move forward, let Angie at CKCF take the conversation to the next stage.