

Endowment and Legacy Readiness Checklist

Preparing your school for an endowment and legacy campaign can be a lengthy, multi-step process — but in the end it will be well worth the effort. The more items you check off, the closer you are to succeeding in your campaign!

- Your head of school has no plan to leave in the next 12 months.
- Your school is not on the brink of closing a division, merging with another school or closing altogether.
- Your board of directors understands its responsibilities to raise funds and is actively engaged in prospect identification, cultivation and solicitation.
- Both your board of directors and head of school are committed to raising endowment dollars as evidenced by the allocation of professional and lay resources to create and execute a successful endowment and legacy campaign.
- Your school has a professional development director who works more than half time for the school on development.
- Your school has and uses a donor tracking system to steward both prospects and donors after they have made their gifts.
- Your school has a respected and inspiring lay-professional team to lead the campaign, cultivate donors and solicit gifts.
- Your school has a track record of successful face-to-face solicitations.
- Your school will invest in hiring an experienced campaign coach to guide and train your team and ensure you hit your campaign goals.
- Your school leaders are committed to educating the grandchildren of your current students.