



COMMUNITY FOUNDATION
OF NORTHERN COLORADO

Nonprofit Agency Funds 101

March 20, 2024

Creating Impact. Leaving Legacy.

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AGENDA

- Poll answers
- Basics of Nonprofit Agency Funds
- Frequently Asked Questions
- Other Ways NoCo Foundation Offers Support to Nonprofits



BASICS OF NONPROFIT AGENCY FUNDS

BASICS OF AGENCY FUNDS



Why does our nonprofit have a fund at NoCo Foundation?

- Your board or staff decision
- Possible motivations
 - Sophisticated investment program
 - Competitive fees
 - Enhanced recognition of your nonprofit
 - Planned giving office
 - Support long-term financial planning and sustainability for your organization
 - Exceptional customer service–Foundation staff liaison to your fund
 - Philanthropic expertise

BASICS OF AGENCY FUNDS



What are the general components of our agency fund?

- Structure: Endowed vs. Non-endowed funds
- Investment pools
 - Conservative, Balanced, Growth
- Accounting for your assets
- [Financial resources](#)



FREQUENTLY ASKED QUESTIONS



How do we access the fund portal or change who has access from my organization?

- Contact your fund liaison!
- Need contact information and level of access

How does our endowment actually work?

- Spendable calculation
- Can more than the spendable be distributed?

Spendable calculation:

4.5% of the average quarterly balance of the fund over the last four years (16 trailing quarters).

Why 4.5%? Allows for the agency to distribute safely and still preserve the endowment principle. This was determined by the Foundation Board's Finance Committee and is consistent with other community foundations.

Funds that have been open less than 4 years have a modified spendable; and the calculation only includes the years it has been open.

A fund must be established for at least 6 months before receiving the first spendable calculation. A fund that has been in existence for at least 6 months, but less than 12 months will receive 2.25% of the average total endowment balance since the inception of the fund.

How do we access donors/funding opportunities at NoCo Foundation?

- Share your Good News with us!
- Donor education sessions, tours
- Grant opportunities from our Community Fund Committees
- Matchmaking opportunities = donations from individual donor advised funds

FAQs, continued

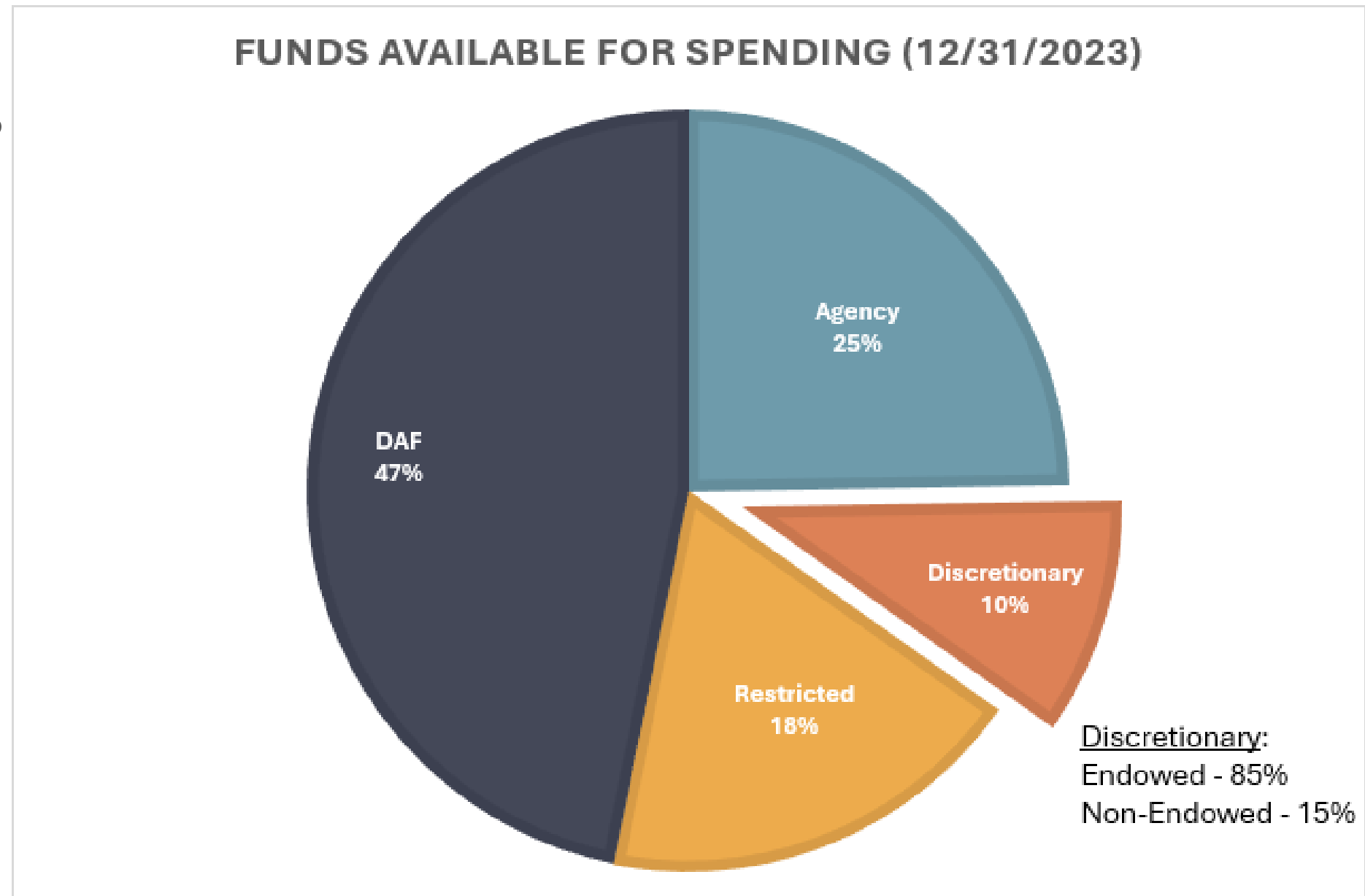


What's the most helpful information we can provide the Foundation? How should we communicate this?

- Notable updates, including new projects/programs
- Share with your fund liaison!

Why doesn't NoCo Foundation grant more money?

- Mechanism of a community foundation
- Discretionary funds



FAQs, continued



What are the first steps for planned giving? How can NoCo Foundation help?

- Establish a gift acceptance policy that includes planned gifts
- Let your donors know you can accept planned gifts
- Contact the Foundation with questions
- Use the Nonprofit Planned Giving Toolkit [on our website](#)

How do we build our fund?

- Endowment campaign
- Earmarking a portion of each unrestricted gift
- Reminder: Best route for outside donations = directly to your organization, **then** deposit in your fund

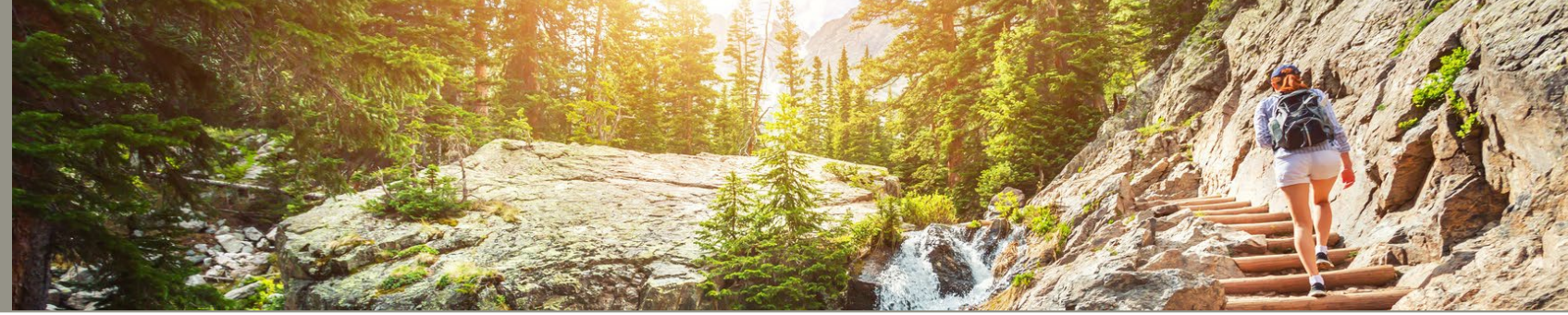
Can the Foundation help us process complex (non-cash) gifts?

- Yes!



OTHER OFFERINGS OF SUPPORT TO NONPROFITS

NONPROFIT SUPPORT



What other ways does NoCo Foundation offer support to nonprofit partners?

- Impact Investing Loan Program
- Organizational Enhancement Matching Program
- Breaking Good News NoCo features
- CO Gives Day regional champion
- Planned giving support and resources
- Share your ideas—Nonprofit Peer Network—starting this summer!
- [Resources available online](#)



RECAP & CLOSING

TODAY WE COVERED

- Basics of Nonprofit Agency Funds
- Frequently Asked Questions
- Other Ways NoCo Foundation Offers Support to Nonprofits

THANK YOU

