Through a Nonprofit/Community-Based Organization (CBO) Fund with the Foundation, community organizations can set aside funds to create long-term stability, plan for future growth, and add to the organization’s credibility with key donors.

The Foundation works closely with the leadership of your organization to help establish a fund that supports your current and future goals. As an additional benefit, the Foundation handles the administration of the fund, leaving your staff and board free to focus on what matters – your mission.

GETTING STARTED IS EASY
A Nonprofit/CBO Fund can help to meet future needs by providing a relatively constant source of operating income. The fund can be opened for a minimum of $10,000 and donors may use cash, stock, or other assets to grow the fund over time. Key benefits include:

PERSONALIZED SERVICE
A Nonprofit/CBO Fund is all about your organization and its goals for the future, whether that means long-term savings or funding for specific, mission-oriented projects and programs. An endowment fund is an ideal choice if you want to protect the longevity and legacy of your organization with a fund that is invested in perpetuity and a portion of the balance can be granted out each year. An expendable fund is another option that allows you to decide when and how much to give as long as you maintain a minimum balance of $500.

EASE
Our professional, experienced staff offers a proven track record in investment management for endowed funds and provides support to help you attract planned gifts to the fund.

FLEXIBILITY
Additional donations can be made to the endowed or expendable fund anytime, and your designated Fund Advisors will have online access to information 7 days a week, 24 hours a day. The Foundation can accept gifts of many types of assets, including stock and – with Board approval – real property and closely held assets.

EFFICIENCY
We handle the administrative tasks of managing the fund – from keeping track of your gifts and acknowledgement letters to managing the fund’s investments, quarterly reporting and tax filings – all for a nominal annual support fee.

The annual Support Fee is the greater of $250 or 1% of the fund’s balance for endowed funds and expendable funds.

SPECIALTY DESIGNED BENEFITS
• Planned Giving Forum of Sacramento membership for two staff or board members, including planned giving training
• Priority selection in year-round capacity building training for nonprofit/CBOs
• Continued education on fundraising with one-on-one guidance from Foundation staff on how to build your fund
• Inclusion in the Foundation’s online donation portal, and access to additional tools to make growing your fund easy
• Networking opportunities at fundholder events
• Priority invitations, as appropriate, to be highlighted at Foundation activities, like Big Day of Giving and Philanthropic Advisors’ Forum events
• Organization highlights in the Foundation’s Impact magazine, website, social media posts, and e-newsletters

CONSIDER A NONPROFIT/CBO FUND IF YOU:
• Lead a nonprofit organization with an IRS 501(c)(3) status with a solid annual operating budget and an appropriate operating reserve.
• Want to support the growth and stability of your organization into the future by creating a steady stream of operating funds at minimal cost. For example, an endowment of $1 million will generate $40,000 in operating funds annually, in perpetuity.
• Seek to attract additional gifts to your organization by demonstrating security and long-term vision, and aspire to build your fund through planned gifts and estate planning strategies, including offering Charitable Gift Annuities to your donors as a growth strategy.
• Want to achieve investment efficiencies by pooling your endowment with other funds at the Foundation to receive long term, sustained results with minimal volatility.
• Prefer to focus on the mission of your organization rather than the tasks of managing an endowment.

WE’RE HERE TO HELP!
Learn more about the Foundation and Nonprofit Endowment Funds by visiting us online at www.sacregcf.org or by calling us at (916) 921-7723.
NONPROFIT FUNDS

916Ink Endowment Fund
* ALF-MVC Leadership Fund
American Marketing Association Sacramento Valley Education Foundation
American River Natural History Association (ARNHA) Endowment
Assistance League of Sacramento Endowment Fund
B Street Theatre Endowment Fund
Boys & Girls Clubs of Greater Sacramento Endowment Fund
* CAFF California Family Farmer Emergency Fund
Capital Stage Endowment Fund
Celebration Arts Endowment
Children’s Receiving Home of Sacramento
Cordova Community Council Foundation Endowment
David Williamson Rugby Referee Scholarship Endowment
Dixon Little League Fund
Easter Seals Superior California-Joanne Budge Endowment Fund
Ethan Allen Herr Memorial Endowment Fund
Eureka Schools Foundation Endowment
Fairytale Town Endowment Fund
* FUTURE Foundation of Sacramento
HomeAid Sacramento Endowment Fund
Hope Cooperative Endowment Fund
Institute for Local Government Legacy Fund
Jack & Lillian Sioukas Endowment Fund to Benefit the Sacramento Public Library Sacramento Room
Junior League of Sacramento Endowment Fund
Lloyd Steinkamp Endowment Fund for Far Western District
Harmony Camps
NCHS-Firehouse No. 1 Museum Endowment
* NCHS-North Star Mining Museum Endowment
* NCHS-North Star Mining Museum Expendable Fund
* NCHS-Railroad Museum Building Fund
NCHS-Railroad Museum Endowment
NCHS-Searls Historical Library Endowment
Nevada County Historical Society (NCHS) Placer Land Trust Natural Wonders Forever Endowment Fund
PRIDE Industries Endowment
* PRIDE Industries Power of Purpose Fund
* Rev. Paul Scheider Memorial Library Capital Campaign Fund
Reason Center Endowment
Rebuilding Together Sacramento Endowment Fund
River City Food Bank Endowment
Roseville Community Crimestoppers Foundation, Inc. Fund
Runnin’ for Rhett Legacy Fund
* Runnin’ for Rhett Short Term Savings
Sacramento Ballet Endowment
Sacramento Choral Society & Orchestra Endowment
Sacramento Covered Endowment for Patient Care
Sacramento Gay Men’s Chorus Endowment
* Sacramento Gay Men’s Chorus Expendable Fund
Sacramento LGBT Community Center Endowment
Sacramento Master Singers John Crowell Memorial Endowment
Sacramento SPCA Endowment Fund
Sacramento Tree Foundation Endowment
San Juan Education Foundation Endowment Fund
Saranaloka Foundation Endowment Fund
Sierra Service Project Endowment

Solar Cookers International Endowment Fund
Soroptimist International of Greater Sacramento Endowment Fund
Swainson’s Hawk Endowment Fund
Triple “R” Endowment
VERGE-CCAS Burnett & Mimi Miller Endowment
WEAVE Fund for Ending Domestic Violence
WellSpace Health Endowment Fund

PARTNER: YOLO COMMUNITY FOUNDATION
* Cache Creek Conservancy Reserve Fund
Cache Creek Nature Preserve Endowment Fund
Center for Land-Based Learning Endowment Fund
* Davis Arts Center Long-Term Investment Fund
* Davis Recreation & Community Services (RCS) Program Fund
Davis Senior Services Endowment Fund
* Davis Senior Services Improvement Fund
* Friends of the Yolo Community Foundation
Friends of Yolo County Archives
Joan Q. Hogan Endowment
* People Resources, Inc. dba Meals on wheels of Yolo County Fund
Putah Creek Council Endowment Fund
* Putah Creek Council Expendable Fund
Valley Elderberry Beetle Mitigation Fund
Western Yolo Recreation Aquatic Fund
* Winters Senior Center Fund
Woodland Schools Foundation Endowment Fund
* Woodland Shakespeare Club
* Yolo County CASA
* Yolo County Children’s Alliance Charitable Fund
* Yolo County Historical Society Fund
* Yolo County Library Foundation Expendable Fund
Yolo Food Bank Endowment for Poverty Reduction & Food Security

* Expendable Funds