



*Movements are in it for the long haul. Shouldn't their resources be too?*

## EndowNow Roadmap & Resource Request for Proposals

Schott Foundation is seeking a contractor to create an accessible resource and roadmap for philanthropy staff and philanthropists to explore and/or implement this long-term philanthropic investment strategy. <https://schottfoundation.org/our-work/endow-now/>

The tool will be designed as an interactive online journey that guides foundation staff and individual donors (on their specific paths) for learning and action – with the goal of incorporating the creation of grantee endowments and/or long-term funding into the philanthropy or philanthropist's portfolio. (Inspiration: <https://smartchart.org>)

The attractive and designed interactive resource will offer the following elements:

- Basic information about endowments for nonprofits and how they work, their benefits
- A match-up tool to determine funder goals and the implementation phase of your organization/donor (there will be 3-4 introduction/implementation stages.)
- A step-by-step interaction roadmap to identify and respond to timing, on-ramps, roadblocks, key stakeholders and strategy.
  - o Specific paths that lead the participant to relevant steps beginning with an assessment to determine which path
  - o Identifying key target stakeholders and decision-makers
  - o Stage of your path and how to use communications to advance
  - o Key resources and activities – sample policies/guidelines
  - o Checklist and evaluation; planning timeline, key financial considerations
- Communications messaging and resources for advancing endowments for key stakeholder audiences.
- Financial requirements/key activities and stakeholders needed – game plan for addressing financial concerns /challenges of this philanthropic strategy with financial experts.

- Resources and tools for implementation on the way. Available case studies and articles.
- Short snippets/quotes/expert advice from organizers, funders and financial experts on the potential/ideas sprinkled through.

Vendor will plan, create, manage and deliver an interactive electronic guide; vendor will provide insights, communications and design expertise to inform the resource. Vendor will develop and test the tool – making it accessible for our audiences. Schott will supply expertise on endowments, existing copy and resources, short snippets, quotes and expert advice copy. Vendor will expected to design content, draft and edit some copy.

Please send two examples of relevant work and your/your company's LinkedIn/website with a cover letter expressing your interest in this project by June 15th. We'd like the roadmap to be finished by September 29th. Our budget for this guide is up to \$30,000.

**Please submit proposals by 6/15/2023 to [communications@schottfoundation.org](mailto:communications@schottfoundation.org).  
We welcome any clarifying questions.**