



Benefits for Agency Partners

The Community Foundation of the Ozarks addresses the needs of nonprofits through the Agency Partner Program. **Any nonprofit, church, school or government entity that establishes a fund with the CFO is considered an agency partner.** Participating agencies have the peace of mind knowing their charitable resources are being managed in a responsible manner by an experienced Investment Advisory Board, as well as a dedicated staff and board of directors committed to working for the benefit of our communities.

The Agency Partner Program provides the following services to members who establish a fund with the CFO or one of its regional affiliate foundations:

Investment Management

- Management of funds as a trusted steward of charitable funds
- Multiple investment and fund options to support the timelines and goals of your organization.
 - Most funds have the option of four different investment pools — Diversified/Growth, ESG Aware, Balanced and Cash.
 - Visit cfozarks.org/investments for to find the most recent performance reports, rates, investment policy, FAQs and more.

Capacity-building Support

- Professional development for staff, board and volunteers including grant writing training and resources, planned giving training, etc.
- Board development
- Strategic planning
- Nonprofit Resource Guide
- Nonprofit Leadership Circles for ED/CEOs and emerging leaders (staff in director or manager positions)

Agencies that choose to partner with the CFO will know they are engaged in a regional effort to enrich and better the lives of people and communities throughout the Ozarks.

Fundraising and Development Support

- Support from the CFO's Donor Services team
 - Expert advice for nonprofits, schools, school foundations and donors on a wide variety of planned gifts
 - Access to the CFO's charitable gift annuity program
 - Advice on planned giving
- Support and advice on how to work with potential and current community donors
- CFO staff provide presentations on behalf of agency partners about giving and leaving a legacy
- Unique donation URL for each fund to use in fundraising activities
- Guidance on how to best use your CFO fund and link for maximum benefit to your organization
- Information on grant opportunities

Administrative/Back-office Support

- Access fund activity and information 24/7 through Fund Manager
- Ability to pay vendors from your fund
- Automatic delivery of tax acknowledgment letters to donors
- Contribution and distribution recordkeeping
- Quarterly financial statements
- Acceptance of a wide variety of donor gifts

Want to know more? Contact **Tiffany Frey**, director of philanthropic services, at tfrey@cfozarks.org, or **Millie Schuchmann**, philanthropic services manager, at mschuchmann@cfozarks.org, or call 417-864-6199.