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Advisor RFPs for Endowments & Foundations: Best Practices and Fundamentals (Webinar Recording)

In this webinar recording, CAPTRUST shares an overview of best practices when it comes to issuing an RFP and reviewing and evaluating the resulting responses.

Over two years later, it is clear that the COVID-19 pandemic continues to have a profound impact on the request for proposal (RFP) process for endowments and foundations to engage an advisor. Now, as some committees may be beginning or restarting their searches, CAPTRUST shares an overview of best practices when it comes to issuing an RFP and reviewing and evaluating the resulting responses.

In this webinar recording, CAPTRUST Senior Director [Greg Middleton](#) is joined by Financial Advisor [Dan George](#) and newly appointed Director of Endowments & Foundations Heather Shanahan. Heather joined CAPTRUST from the Ronald McDonald House in Chapel Hill, North Carolina, where she served as the executive director. As a former nonprofit leader, she brings a unique perspective to the webinar around the challenges organizations might be facing, such as operations issues, governance, and fiduciary responsibilities.

Listen to learn about:

- The fundamentals of implementing a comprehensive and efficient RFP process;
- the impact that an increased focus on cybersecurity and diversity, equity, and inclusion (DEI) has had on the RFP process; and
- unique considerations for endowments and foundations.

Additional Resources

[CAPTRUST's 2021 Endowment and Foundation Survey Results](#)
[Chief Investment Officer's Market Update](#)

[Sample Endowment and Foundation Dashboard](#)
[Sample Endowment and Foundation Investment Policy Statement](#)
[Sample Endowment and Foundation RFP Template](#)
[Webinar Presentation Deck](#)

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