Plan Your Work and Work Your Plan

A Sample Stewardship and Storytelling Plan That's Working

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Why should you create a Donor ~~Marketing~~ Stewardship Plan?

One Man Band

Why should you create a Donor ~~Marketing~~ Stewardship Plan?

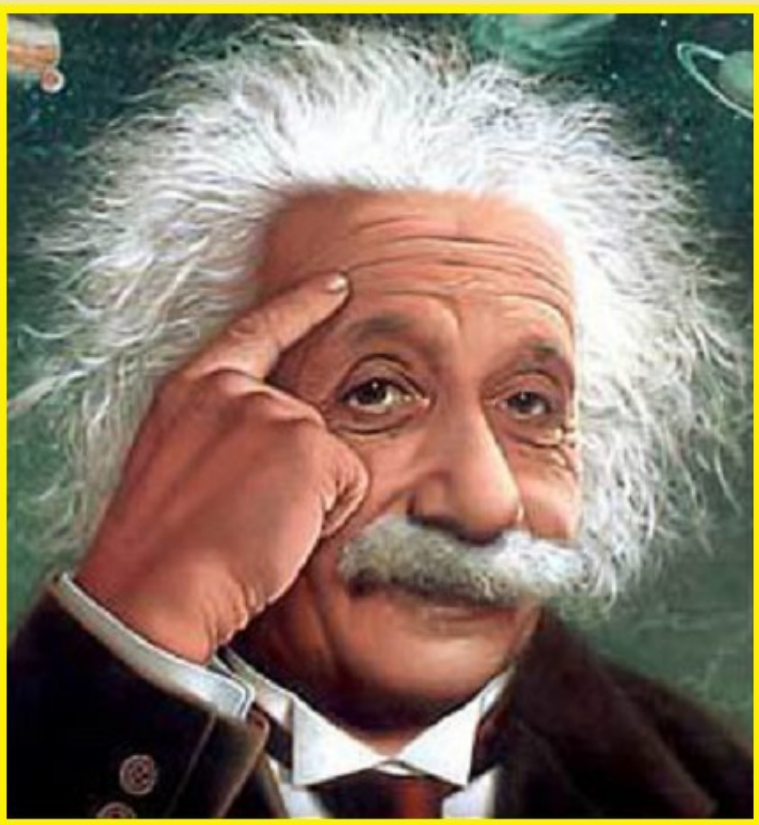
Stewardship Results	*2013 = Baseline year - No stewardship plan in place.*	** 2014 Increase from Baseline year*	*2015 Increase from Baseline year*	*2016 Increase from Baseline year*	*2017 Increase from Baseline year*	*2018 Increase from Baseline year*	** 2019 Increase from Baseline year*	*2020 Increase from Baseline year (Covid)*
Donors	422	17%	32%	18%	37%	66%	78%	28%
Gifts	726	28%	46%	28%	34%	41%	64%	17%
Donations	$512,881	252%	198%	108%	108%	155%	821%	487%

*Subtracted Lilly GIFT VI and GIFT VII donations for truer comparison

Commit to this advice…

- Organizations that are small, and likely don't have big budgets, can grow and thrive.
- You can’t do everything yourself; it won’t work.
- You can multiply your efforts with the help of your team, employees and volunteers are all part of the team.
- Remember, the goal is to engage as many ambassadors as possible.

How could a Donor ~~Marketing~~ Stewardship Plan work—without killing me, my team, or both?



Insanity: doing the same thing over and over again and expecting different results. ~Albert Einstein.

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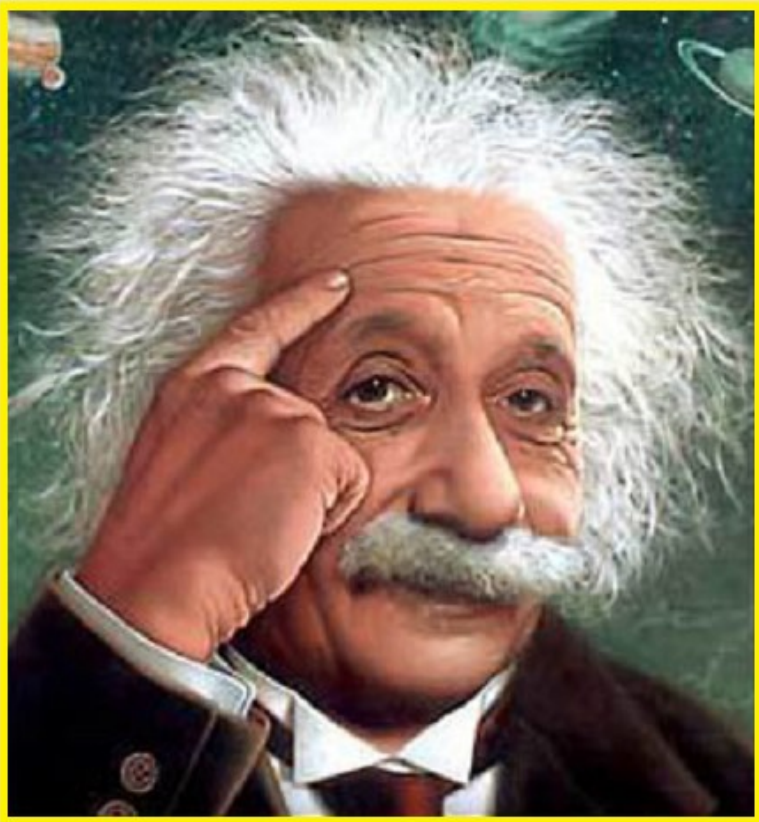

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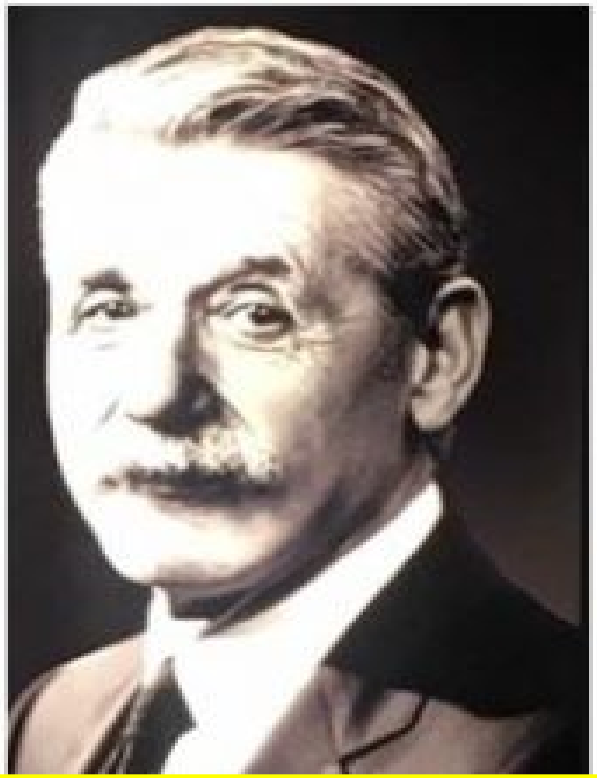

Sanity: planning your work and working your plan; modifying as needed.

Actually, our current Donor ~~Marketing~~ Stewardship practices were killing us… and we didn't even know it.

1. What is your **goal** – what do you want your communications to do?
2. Who is your **target** – who do you need to communicate to?
3. What **channels** do you have to communicate?

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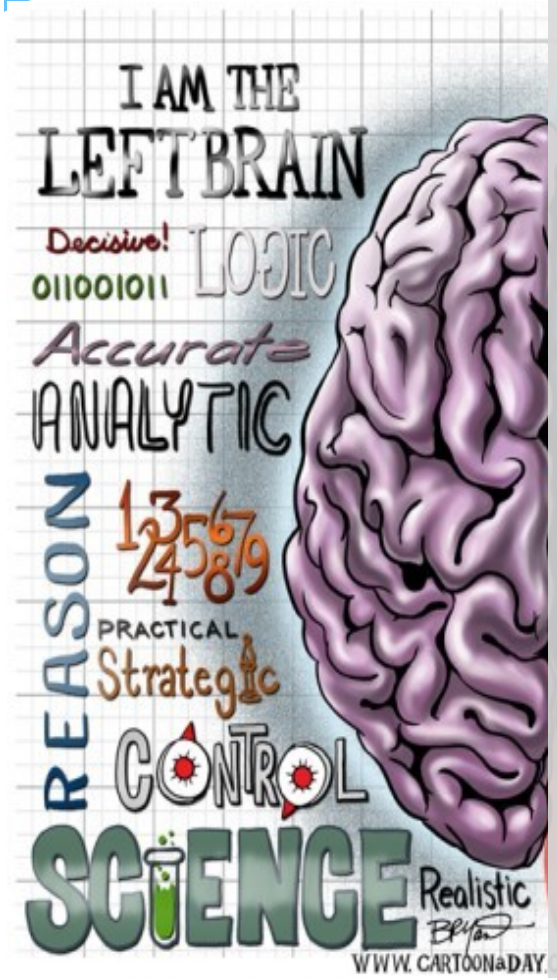
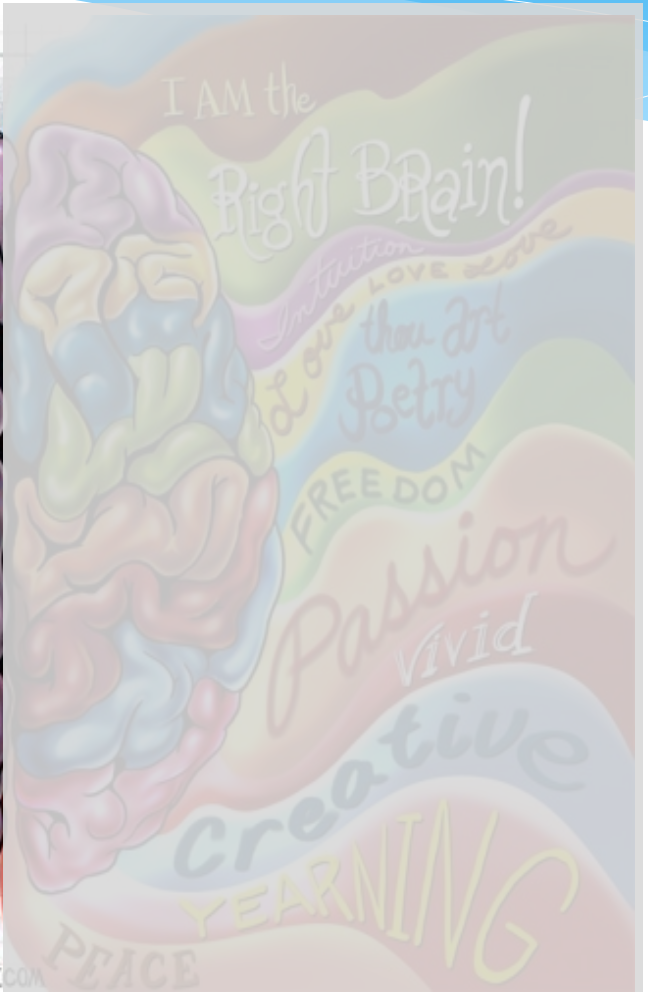
4. What is your **message** – what do you want to say (and why)?
   - To increase awareness
   - To inspire engagement
   - To increase support
   - To raise money
   - To tell your story

*Kelly Young, Baise Communications

Rationale for change…



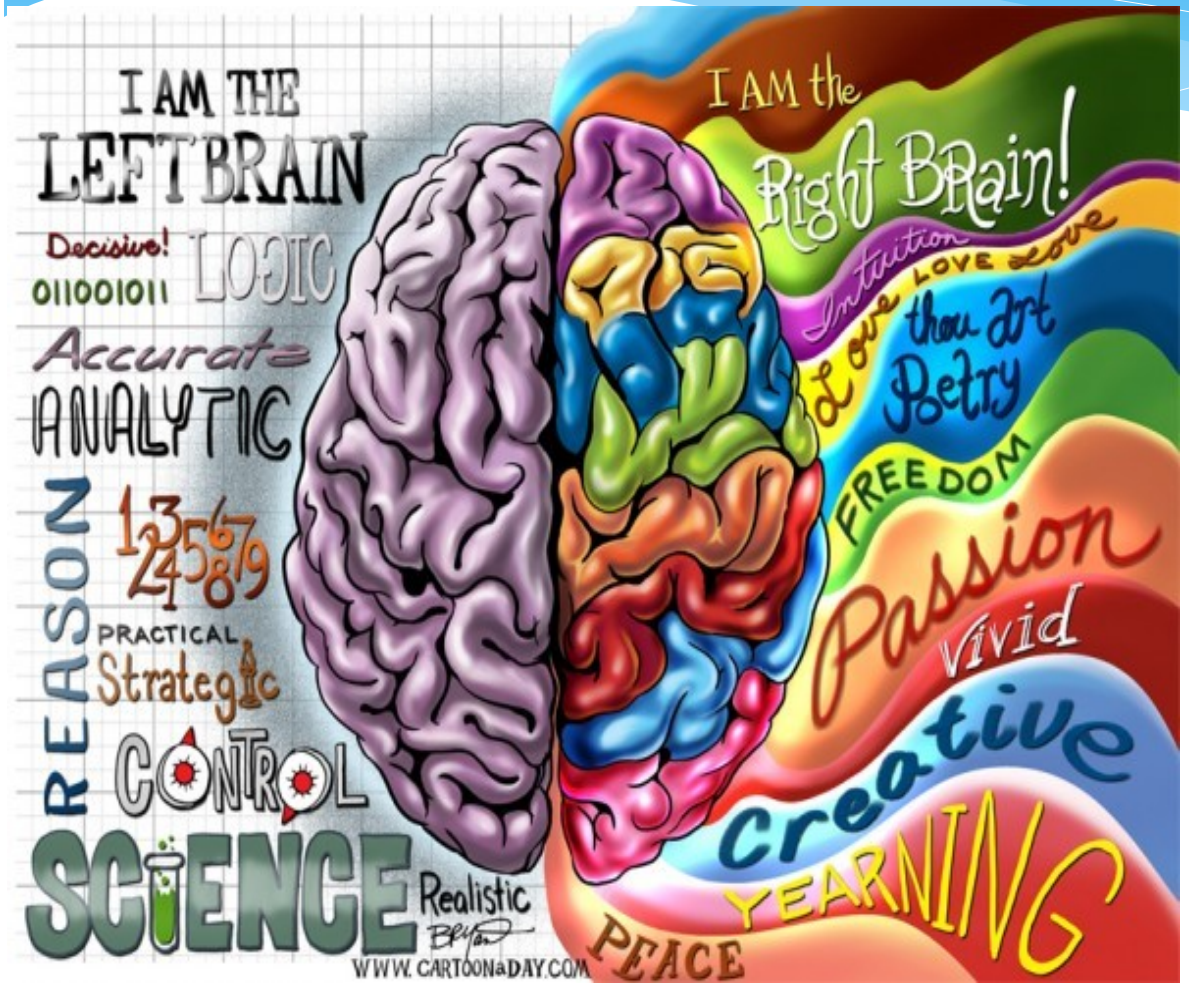


LEFT BRAIN—As you create your PLAN you can make <u>strategic</u> decisions about your GOALS, TARGETS, and CHANNELS. You can also determine WHO is responsible and WHEN things should happen.

Rationale for change…

RIGHT BRAIN—This allows you to be CREATIVE throughout the year as you determine your MESSAGE, what you want to say, and how you want to say it.

Rationale for change…



Multitasking impairs your best thinking.

Repeatedly switching back and forth from project to project, can impair our ability to function at our finest.

We unequivocally perform best one thing at a time.

The neuroscience is clear: We are wired to be mono-taskers.

~ 2017, Cleveland Clinic

Our pre-2014 Marketing Insanity

- **A strategic plan (left brain), implemented poorly (right brain), is a waste of time for you.**
- **A weak plan (left brain), implemented beautifully (right brain), is a waste of time for your donor.**

We do left brain tasks 2 days a year; using data to make all decisions.

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2. Who is your **target** – who do you need to communicate to?
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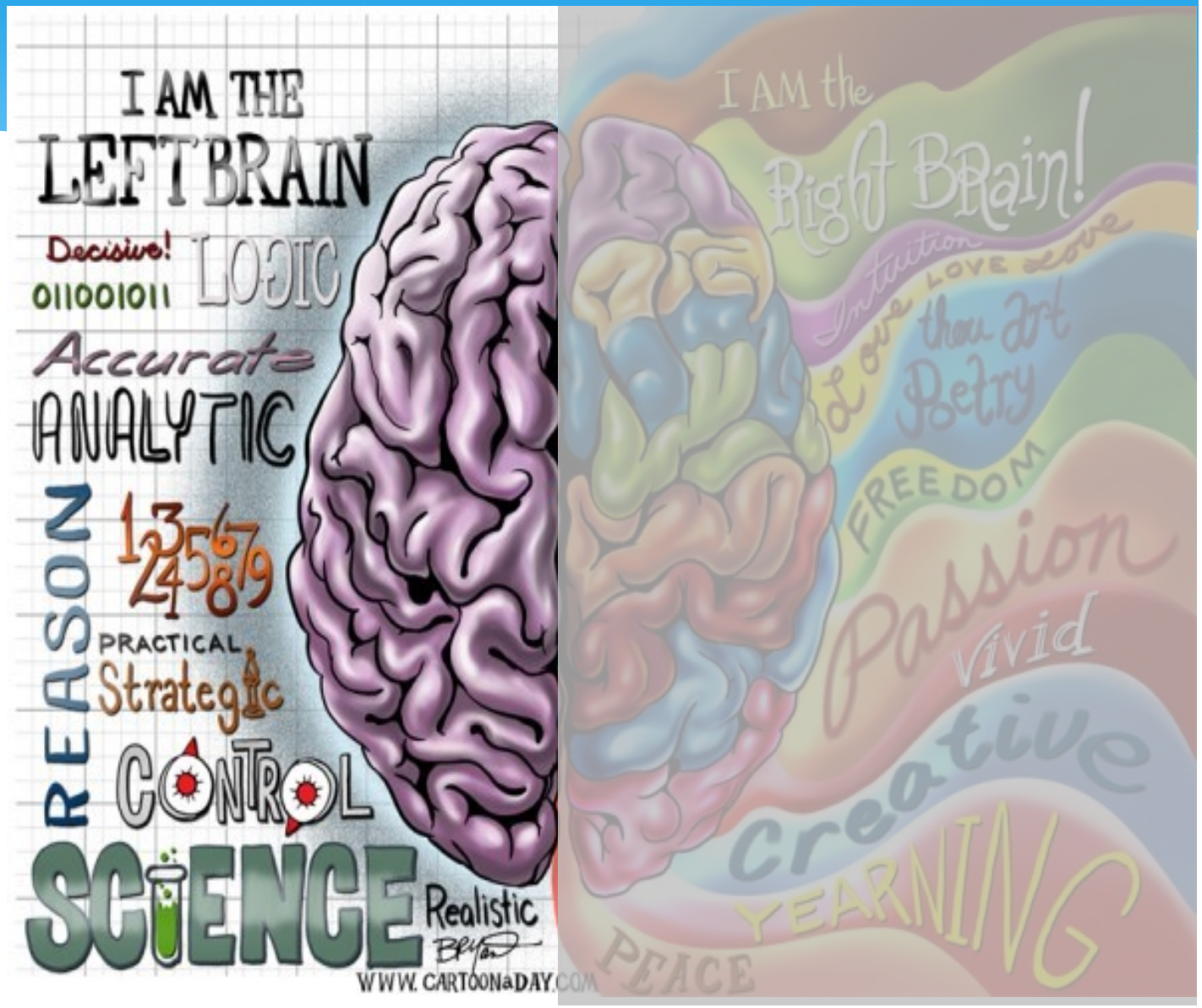
LEFT BRAIN: Let's create some plans!

START HERE!



Step #1:

Define Your Target Audience

Looking for seekers (who are looking for you) by Seth Godin

"Don't go to the supermarket when you're hungry."

The reason is obvious--when you're hungry, you're likely to buy things. The risk is that you'll buy something you don't need, because, of course, all that buying isn't actually making you less hungry.

The same thing is true for just about anything we seek to sell. **Selling water to a thirty-person**, education to someone seeking enlightenment, goals to someone eager to move forward—**this is dramatically easier and more satisfying than first having to persuade someone that they should actually care about the difference you're trying to make. Obvious? I think so.**

But most marketers make this mistake on the very first day and keep making it for their entire career.

You might be in love with the change you are trying to make in the world. Best to begin with an audience that's rooting for you to succeed.

Step #1:

Define Your Target Audience

- Start with the MOST IMPORTANT PROSPECTS and add from there:
  → **WHO IS THIRSTY FOR THE WATER YOU ARE SELLING?**
- Our target prospect lists have been modified each year since we began in order to perfect it, based on data we review each year.
- Your lists will *likely* include some of these prospects…
  - ✓ Fund Contacts
  - ✓ Professional Advisors
  - ✓ Current Board Members
  - ✓ Past Board Members
  - ✓ Top 50 Prospects from past 5 years
  - ✓ Top 50 Prospects of all time
  - ✓ Unrestricted Prospects
  - ✓ New Donors
  - ✓ Loyal Donors
  - ✓ Pass-Through Donors
  - ✓ Scholarship Recipients
  - ✓ Grant Recipients
  - ✓ Farmers
  - ✓ Business Owners

- ❖ If you MAKE A DECISION to SEND THINGS to ANYONE or ANY GROUP throughout the year, they ARE A VIABLE PROSPECT.
- ❖ <u>DO NOT</u> try to market to everyone.
  (This will be the hardest habit to break.)
- ❖ When we select a target audience, we choose the Top 50 people in that group and we steward them well.

Step #1:

Define Your Target Audience

- We TARGET DONORS who we wish to move up a giving level or get involved/active?
- **BOTTOM LINE:** Make Data-Driven Decisions on who should be in each Segmented Group.
- If you're a small organization, start small; BUT, choose the thirstiest people in which to sell your water.

- One Person might steward: (1) Board Members
  (2) Past Board Members
  (3) Top 50 Prospects from the past 5 years

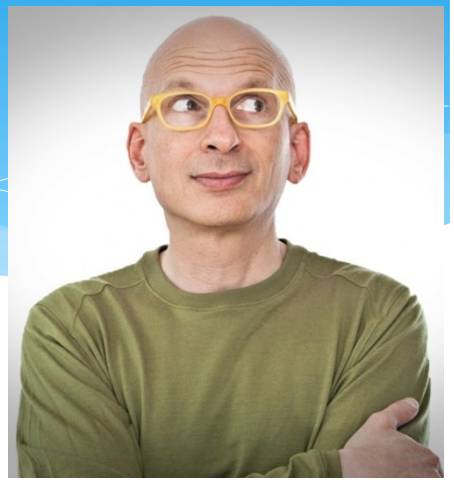
- Two people might steward: (1) Board Members
  (2) Past Board Members
  (3) Top 50 Prospects from the past 5 years
  (4) Fund Founders
  (5) Professional Advisors

Look at your data. Who are the **BEST 50 PROSPECTS** in each identified group?

For example:

TOP 50 PROSPECTS FROM THE PAST 5 YEARS = 2014-2018 ENDOWED DONORS WITH LARGEST DONATIONS.

Rationale for change…



In search of the minimum viable audience by Seth Godin

Of course, everyone wants to reach the maximum audience. To be seen by millions, to maximize return on investment, to have a huge impact.

And so we fall all over ourselves to dumb it down, average it out, pleasing everyone and anyone.

You can see the problem.

When you seek to engage with everyone, you rarely delight anyone. And if you're not the irreplaceable, essential, one-of-a-kind changemaker, you never get a chance to engage with the market.

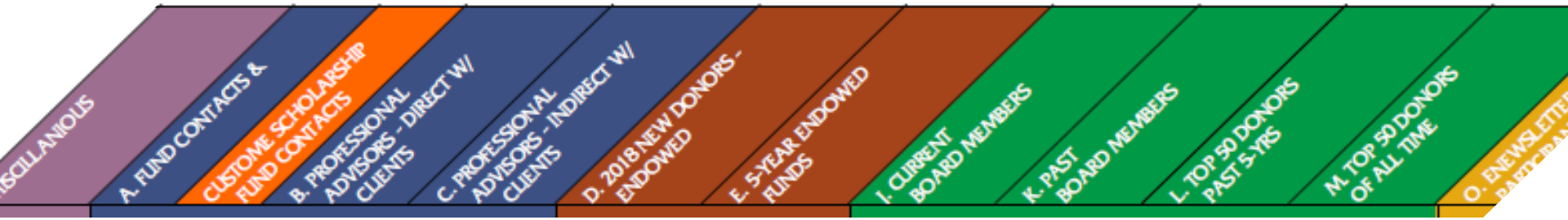
The solution is simple but counterintuitive: Stake out the smallest market you can imagine. The smallest market that can sustain you, the smallest market you can adequately serve. This goes against everything you learned in capitalism school, but in fact, it's the simplest way to matter.

When you have your eyes firmly focused on the minimum viable audience, you will double down on all the changes you seek to make. Your quality, your story, and your impact will all get better.

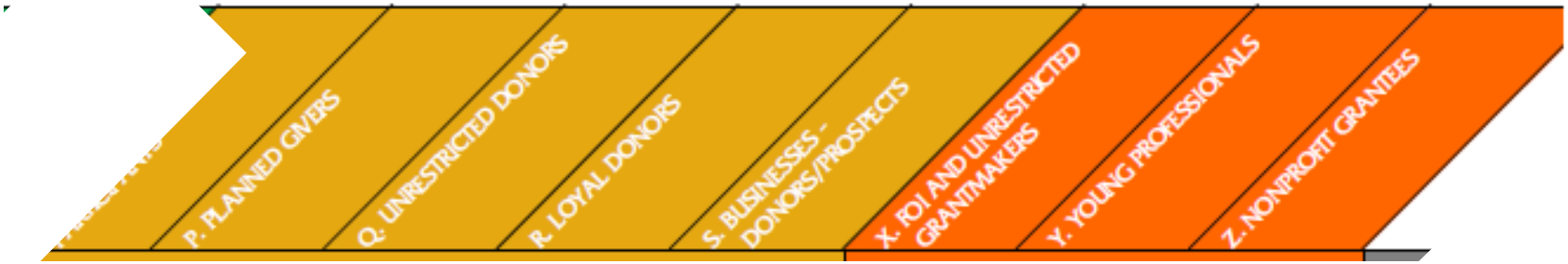
And then, ironically enough, the word will spread.

Step #1:

Define Your Target Audience



2019 - THE HAPPINESS LABORATORY

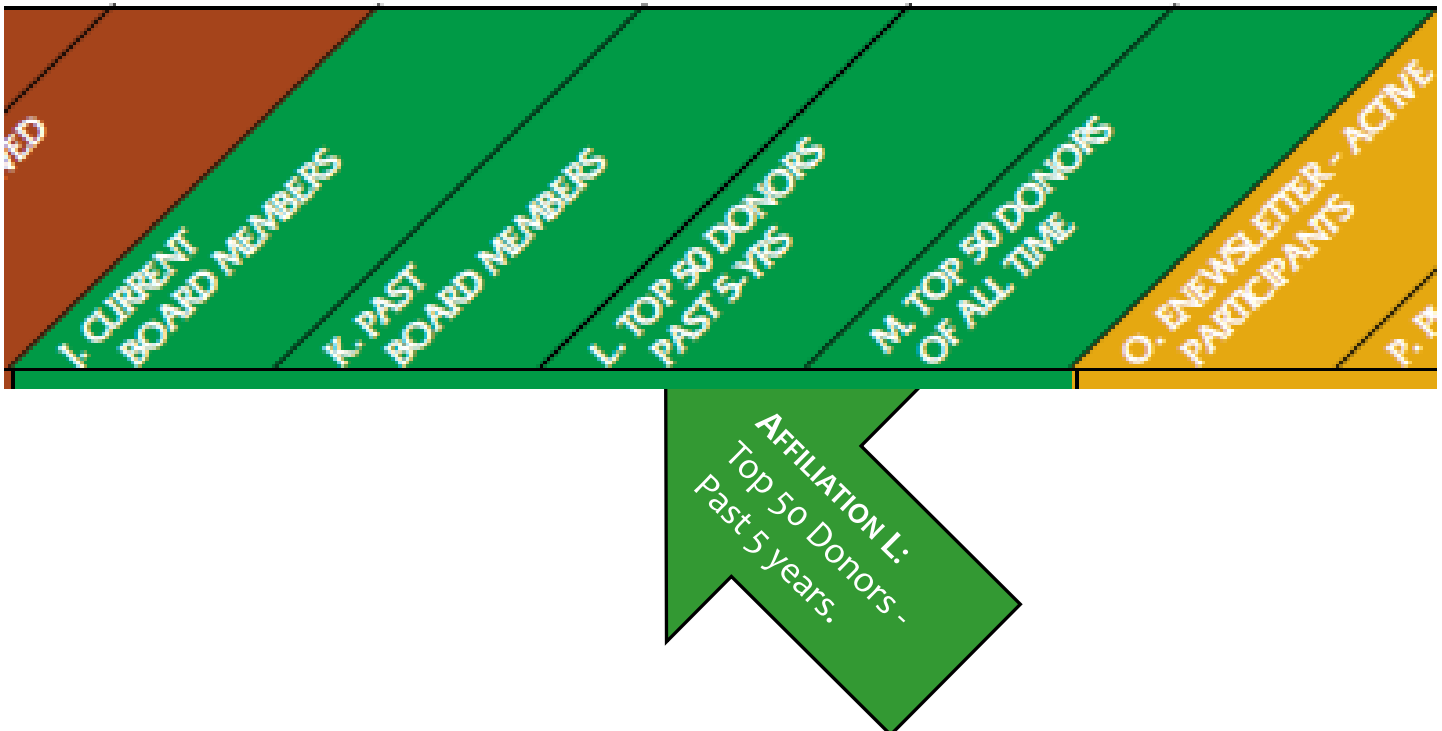


Step #1:

Define Your Target Audience

- More Targeted Marketing DOESN'T mean More Work—**Do less, but do less better**, **and with a custom touch**. Mailing 50 specialized letters is much easier than a 1000 or 10,000 piece bulk mailing…and the donors can tell the difference.

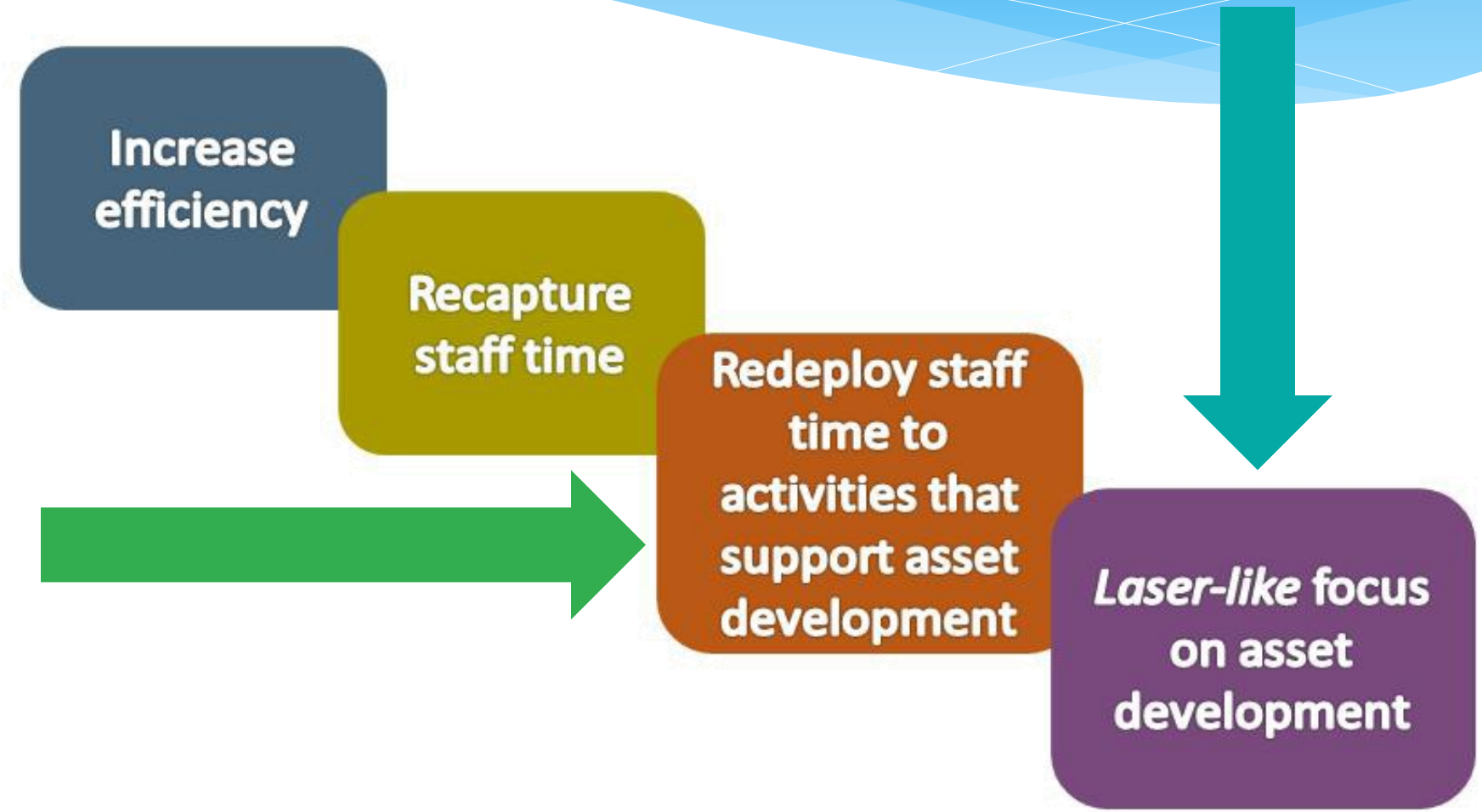
- We use the alphabet to categorize our prospects AND we affiliate these TARGET AUDIENCES by category in our donor database so we can easily pull reports.



Rationale for change…

- You're DOING LESS BETTER; paying attention to your TRUE PROSPECTS and not just 1000's of SUSPECTS.
- When donors are affiliated by CATEGORY, you can PROVE if this new strategy is working.
- You can pull reports by donor affiliation to see if these donors are giving, giving more frequently, or giving more money.
- You can easily see what marketing strategies elicited gifts and which ones didn't.
- You can see if the amount you spent on a marketing piece paid for itself via donations.
- You can now make DATA-DRIVEN decisions based on donor response.
- So, you can STOP what's not working.
- So, you can DO more of what is working.

Step #2:
Make Assignments—Divide & Conquer



*Rosemary Dorsa & Terri Johnson, Indiana Philanthropy Alliance

Step #2:
Make Assignments—Divide & Conquer

- Start with the MOST IMPORTANT PROSPECTS and DETEMINE WHO IS BEST TO BUILD THAT RELATIONSHIP.

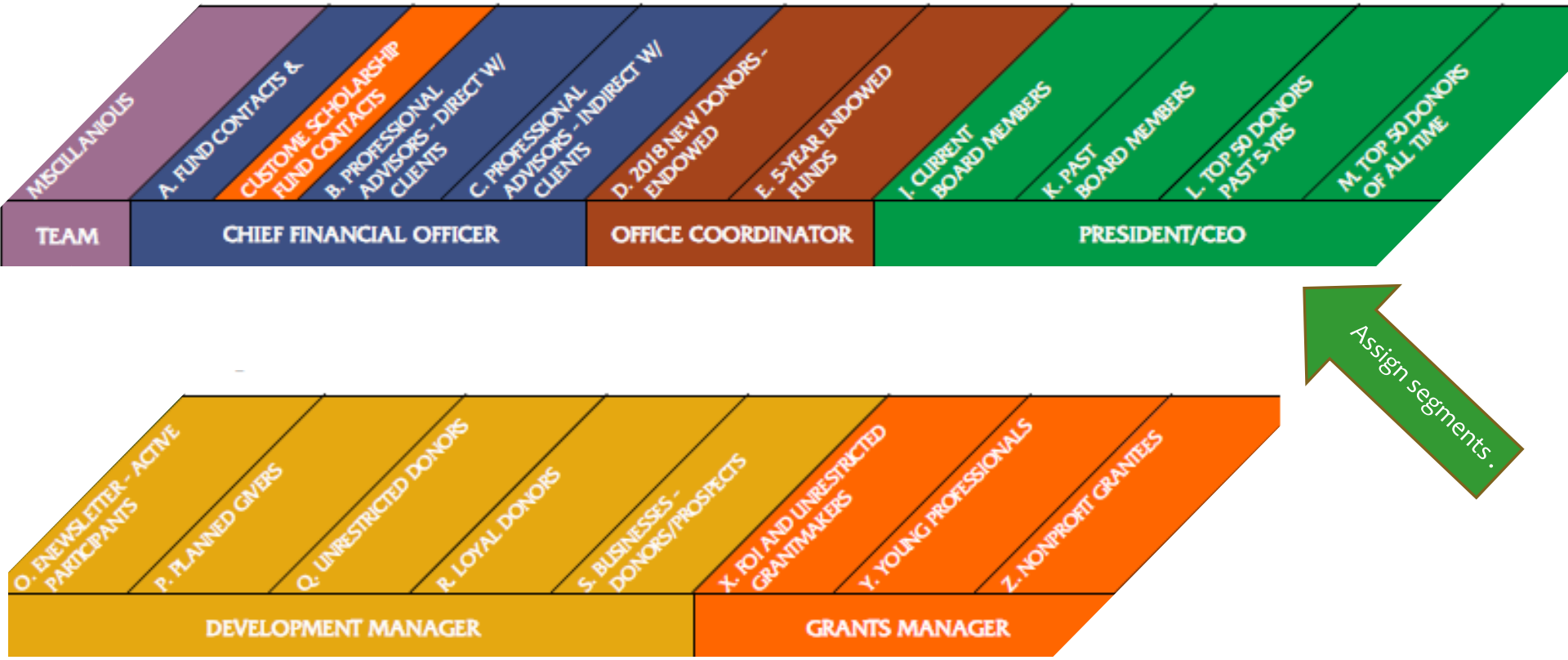
UCLA

Why People Give

- What are the three primary reasons why people say "yes" when asked to give?
  - Because the are *expecting* to be asked
  - Because they *are* asked
  - Because the *right* person asked

Step #2:
Make Assignments—Divide & Conquer

- Chief Financial Officer (CFO), Office Coordinator (OC), President/CEO, Development Manager (DM), & Grants Manager (GM)



Rationale for change…

You graduate from a ONE-MAN-BAND to THE BEATLES… OR AT LEAST A DUO OR TRIO!

"A Team of Equals: This is an organization staffed with people who have particular skills, skills that you don't have. This is the Beatles." ~Seth Godin

Step #3:
What Marketing Tools Do You Have?

- What tools will you use to communicate your message to a specific target audience?
- ANYTHING you've ever mailed to a donor, donor group, or used to bring in donations IS MARKETING.

MARKETING/COMMUNICATION MATERIALS, EVENTS, IDEAS

Electronic Mailings	Target Mailings	Other	Special Events	Web/Social Media	Surprise them with Gratitude
• eNewsletter/blogs • Quarterly Newsletter • Donor Stories • PA Advisor Website/PA Resource • PA/NPO Annual Continuing Education Seminars	• Annual Report • Thanksgiving Card or maybe something more unexpected than that…like National Donut Day = June 6th; or March 10th = International Day of Awesomeness; October = National Popcorn popping month, 100th Birthday of CF's; CFGC 30th Birthday. Capital cities Report • CF 101 • Info Packet • Insurance brochure • Gift Annuities brochure • Quarterly Newsletter • Quarterly Balance Sheet • Fund Birthday cards • Donor Stories • Year End Letters • PA Advisor Website/PA Resource	• Peer to Peer Cultivation • Print Ads • Postcards • Donor Marketplace business cards • Personal Visits • Phone calls	• Donor After Hours • PA After Hours • Special Matching letter • PA Firm Presentation • Give Me Five Grant Reception	• Annual Report • Website • Twitter • Facebook • Pinterest • Donor Stories	• Swag • Surprise them with gratitude – Christmas caroling; tickets to plays, Starbucks, Blizzards,

This was our YEAR 1 brainstormed list of things we already had, or used, to market to donors.

Step #3:
What Marketing Tools Do You Have?

- DO NOT CREATE bunch of new MARKETING MATERIALS… especially in YEAR 1.
- DO USE what you have already… you may need to do an INVENTORY to remind yourself of all of the great things you ALREADY have on hand.

This is a more recent brainstormed list of things we will use to market to donors.

Since we know we can learn from our data and interactions each year in order to improve, this year we concentrated on an **Educate, Ask, Thank, Report** model.

EDUCATE 1		GIFT VII / SCHOLARSHIP TIMELINE	QR. GIFT VII UNRESTIRCTED	GIFT VII	WAYS TO GIVE	MARKETPLACE POINTERS	G7-COMMUNITY LEADERSHIP PLAN	G7-LILLY MATCH	G7 MATCH COMMUNITY LEADERSHIP	G7-LILLY MATCH
EDUCATE 2		WAYS TO GIVE / SCHOLARSHIP PROCESS	QR. WAYS TO GIVE		CF - OUR PITCH	CF - OUR PITCH	ANNUAL REPORT	COMMUNITY LEADERSHIP EDUCATION	PLANNED GIVING	EDUCATION ON OUR COMMUNITY LEADERSHIP
ASK		PLANNED GIVING / REVIEW	QR. PROFESSIONAL DEVELOPMENT	PROFESSIONAL DEVELOPMENT	EXPLORE CAUSES IN DONOR MARKETPLACE	CREATE YOUR FUND PITCH	SCHOL. REVIIEWER-SCHOLARSHIP PROCESS	G7 – LILLY MATCH	UNRESTRICTED NAMED FUND	UNRESTRICTED G7 GIFT OR IMPACT INVESTING
THANK		SPENDING CALCULATOR / SCHOLARSHIP PROFILES	QR. PLANNED GIVING		MARKETING TOOLS TO AMPLIFY PASSION	WAYS TO GIVE	WAYS TO GIVE	ANNUAL REPORT	TFTGC	ENDOWMENT
REPORT		IMPACT / GIFT VII	TOOLKIT		SOCIAL MEDIA ANALYTICS INFO SHEET	IRA CHARITABLE ROLLOVER	IRA CHARITABLE ROLLOVER	GIFT VII	ACORN FUNDS	NATIONAL STANDARDS
						GIFT VII	GIFT VII	GIVE NOW / GIVE LATER	GIFT VII	GIFT VII
						THANKS FOR READING	PLANNED GIVING	COMMUNITY IMPACT GRANTMAKING	BEING LOYAL	HAPPY 35TH BIRTHDAY
						COMMUNITY IMPACT GRANTMAKING	ANNUAL REPORT	COMMUNITY LEADERSHIP	ANNUAL REPORT	COMMUNITY IMPACT GRANTMAKING

TRANSPARENCY (NEW GRANTS PROCESS)	WHO WE ARE	SUSTAINABILITY	EDUCATE 1
NATIONAL STANDARDS	WAYS TO GIVE	DIVERSIFYING FUNDING	EDUCATE 2
SIMILAR CAUSES GIFT VII	GIVE TO GIFT VII	SURVEY	ASK
CONNECTING GRANTEES TO DONORS	SERVE GRANT COUNTY	OFFER OUR SPACE	THANK
GRANT STORIES	GRANT STORIES	NEED FOR ENDOWMENT (GIFT VII)	REPORT

Rationale for change…

- You're being a better steward of the resources you already have by making an inventory of them and using them in a targeted way.
- Using what you have can ultimately save you time and money.
- Recycling is possible if you send something to a new Target Group since it's new to them.

Step #4:

Plan Your Work; Work Your Plan

- Work with your team to determine:
  - (1) what time of year is best
  - (2) to send a specific stewardship piece
  - (3) to a specific audience segment.
- Start small and build on your successes.

MONTH	WEEK	MISCELLANEOUS	A. FUND CONTACTS & CUSTOME SCHOLARSHIP FUND CONTACTS	B. PROFESSIONAL ADVISORS - DIRECT W/ CLIENTS	C. PROFESSIONAL ADVISORS - INDIRECT W/ CLIENTS	D. 2018 NEW DONORS - ENDOWED	E. 5-YEAR ENDOWED FUNDS	I. CURRENT BOARD MEMBERS	K. PAST BOARD MEMBERS	L. TOP 50 DONORS PAST 5 YRS	M. TOP 50 DONORS OF ALL TIME	O. ENEWSLETTER - ACTIVE PARTICIPANTS	P. PLANNED GIVERS	Q. UNRESTRICTED DONORS	R. LOYAL DONORS	S. BUSINESSES - DONORS/PROSPECTS	X. ROI AND UNRESTRICTED GRANTMAKERS	Y. YOUNG PROFESSIONALS	Z. NONPROFIT GRANTEES	WHO'S ON DECK?
		TEAM	CHIEF FINANCIAL OFFICER			OFFICE COORDINATOR		PRESIDENT/CEO				DEVELOPMENT MANAGER					GRANTS MANAGER			
JANUARY	1											WAYS TO GIVE	WAYS TO GIVE			ENDOWMENT				SHELLY
	2								G7-LILLY MATCH											DAWN / LORETTA
	3																		OFFER OUR SPACE	MEAGAN
	4		SPEND CALC	QR. REVIEW																SHERRI
	5																			
FEBRUARY	1	LNO												ANNUAL REPORT	TFTGC					SHELLY
	2	VALENTINE'S				DONOR MARKETPLACE	MARKETING TOOLS	SCHOL. REVIEWER/ SCHOL PROCESS		G7-LILLY MATCH	G7-LILLY MATCH									DAWN / LORETTA
	3																NATIONAL STANDARDS	WHO WE ARE		MEAGAN
	4			QR. GIFT VII	GIFT VII															SHERRI
MARCH	1											IRA CHARITABLE ROLLOVER	IRA CHARITABLE ROLLOVER			NATIONAL STANDARDS				SHELLY
	2								COMMUNITY LEADERSHIP											DAWN / LORETTA
	3																		DIVERSIFYING FUNDING	MEAGAN
	4	LNO															SCHOLARSHIP WEEK			SHERRI
APRIL	1													GIFT VII	ACORN FUNDS					SHELLY
	2							G7-COMMUNITY LEADERSHIP PLAN												DAWN / LORETTA
	3																			MEAGAN
	4		IMPACT	PROFILES	TOOLKIT															SHERRI

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	3																NATIONAL STANDARDS	WHO WE ARE		MEAGAN
	4			QR. GIFT VII	GIFT VII															SHERRI

Step #4:

Plan Your Work; Work Your Plan

- If you can't make it happen, X it out and move on.
- Set goals to communicate with each target audience several times a year, but only what you can manage. No one will ever know if you skip something.

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		TEAM	CHIEF FINANCIAL OFFICER			OFFICE COORDINATOR		PRESIDENT/CEO				DEVELOPMENT MANAGER					GRANTS MANAGER		
JANUARY	1											WAYS TO GIVE	WAYS TO GIVE			ENDOWMENT			SHELLY
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FEBRUARY	1	LNO												ANNUAL REPORT	TFTGC				SHELLY
	2	VALENTINE'S				DONOR MARKETPLACE	MARKETING TOOLS	SCHOL. REVIEWER/ SCHOL PROCESS		G7-LILLY MATCH	G7-LILLY MATCH								DAWN / LORETTA
	3																NATIONAL STANDARDS	WHO CARE	MEAGAN
	4			QR. GIFT VII	GIFT VII														SHERRI

X

Step #4:
Plan Your Work; Work Your Plan

N. Unrestricted Prospects: Layering throughout the year.

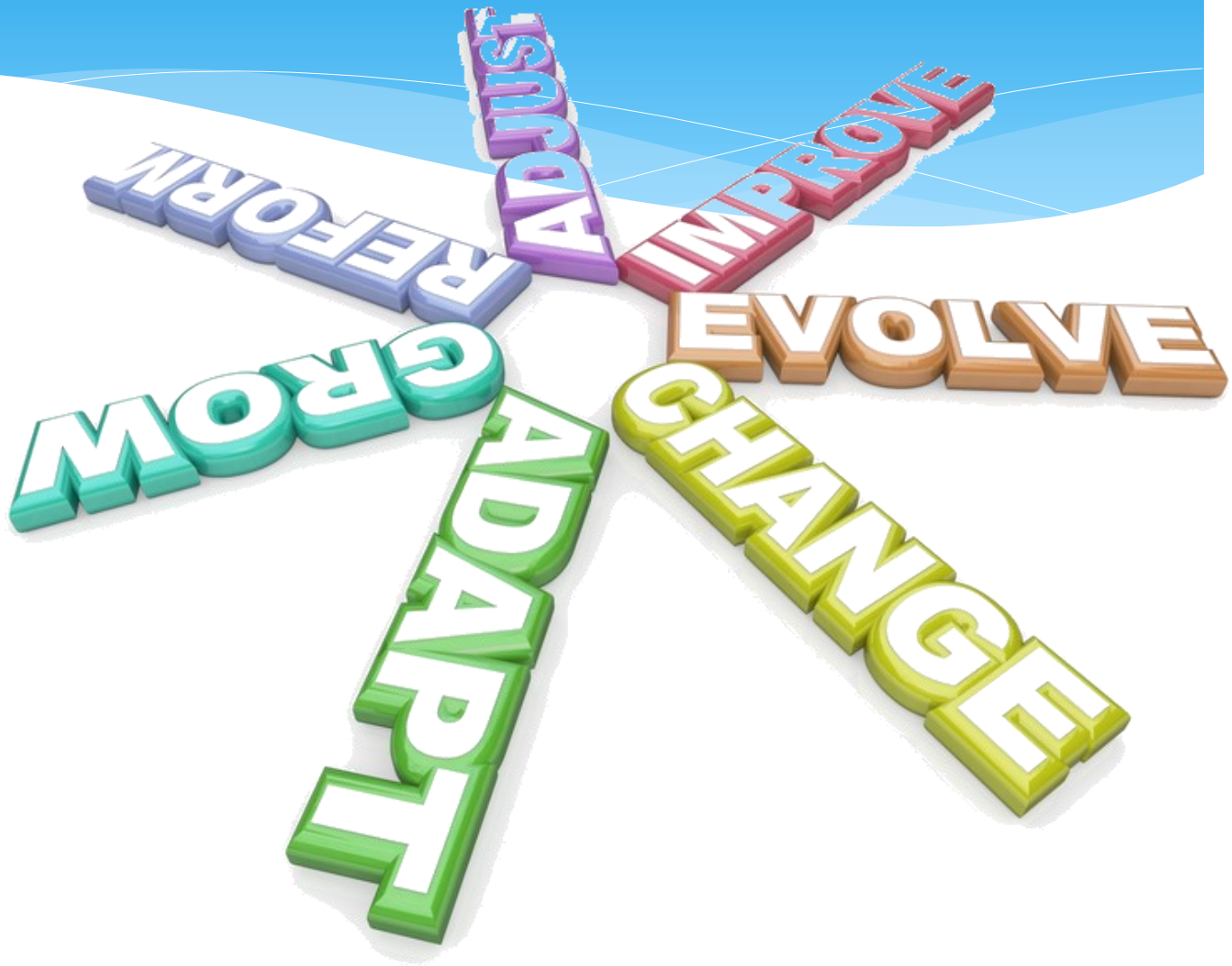
"Many are making their estate plans in their mid-80's or beyond.

On average wills are completed just a few years prior to death".

~Robert Sharpe, The Sharpe Group

Rationale for change…

- Stewardship can be timely.
- It's your plan, so you can change it whenever needed.
- Any changes can be noted to make your plan better next year.



Step #5:

Integrate Social Media

- This task replicates the Donor Stewardship Plan by planning your goal, segment, and channels (LEFT BRAIN)…
- And saving your actual message to be determined in real-time (RIGHT BRAIN).

2019 Social Media

#MadeMeSmile #Awwducation #GiveWhereYouLive

#HappyActivist #LaughAtHalf #LoveWhereYouLive

	Post Type	Facebook	Twitter	Instagram
P/CEO	Best Giving Story of the Month	+	+	
P/CEO	Overheard at the CF	+	+	
P/CEO	Happy Quotes of the Week	+	+	
CFO	Match Update	+	+	
CFO	Dashboards/Graphs	+	+	+
DM	Laugh At Half	+	+	
DM	Intentional Cross Promotions	+	+	
DM	Educational Projects	+	+	
GM	Follow-up Friday	+		+
GM	Happy Activist	+		
GM	Awwducational	+	+	+
OC	5 Year Birthday Brick Milestones	+	+	
OC	Honorariums	+	+	+
OC	Didja's	+	+	+
NA	No Posting	+	+	+

Step #5:

Integrate Social Media

- Be Strategic: Plan who, what, when, where, and why.

P/CEO
P/CEO
P/CEO
CFO
CFO
DM
DM
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February							
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Facebook Start: End: % ↑ ↓ :

Twitter Start: End: % ↑ ↓ :

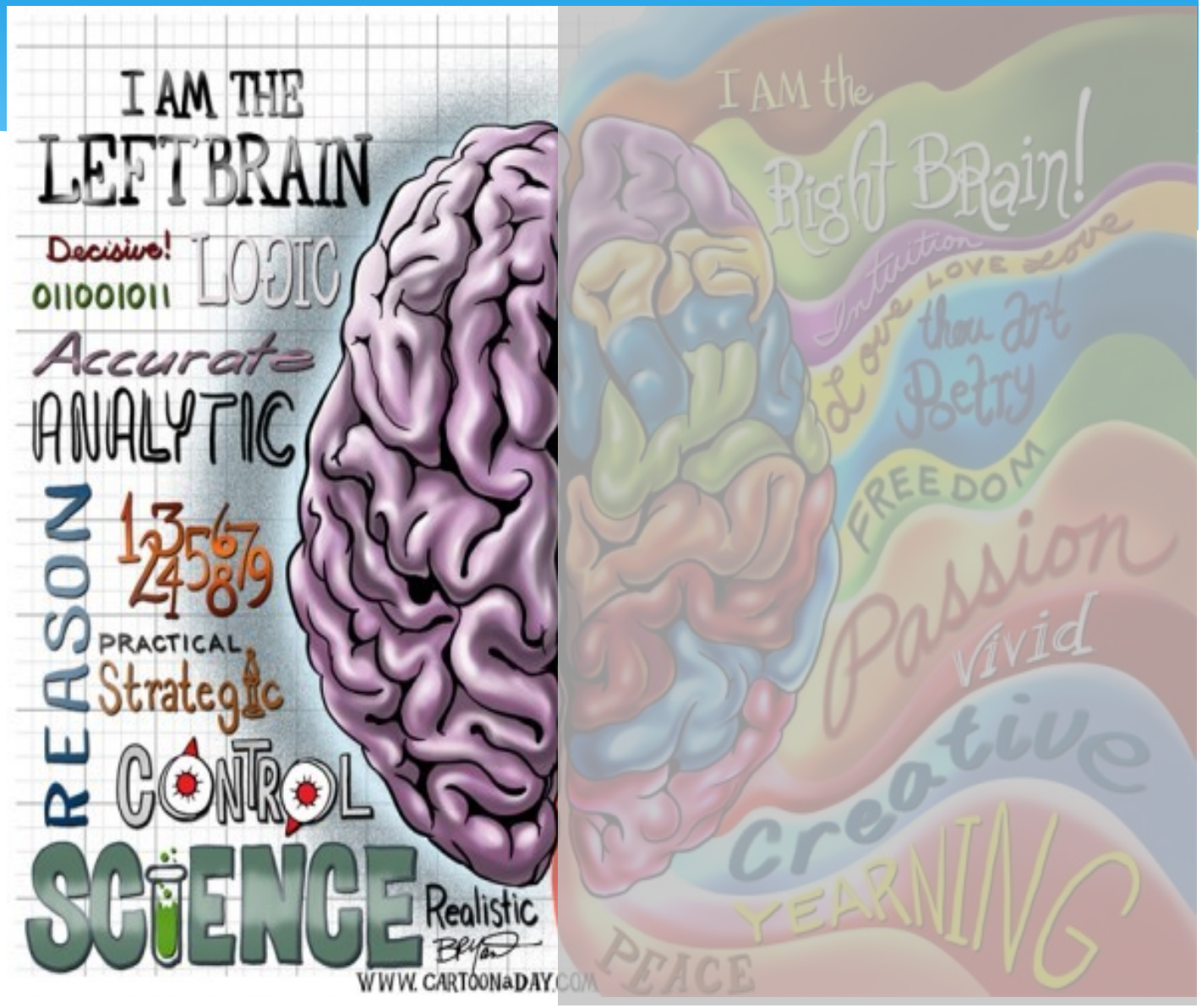
Instagram Start: End: % ↑ ↓ :

Rationale for change…

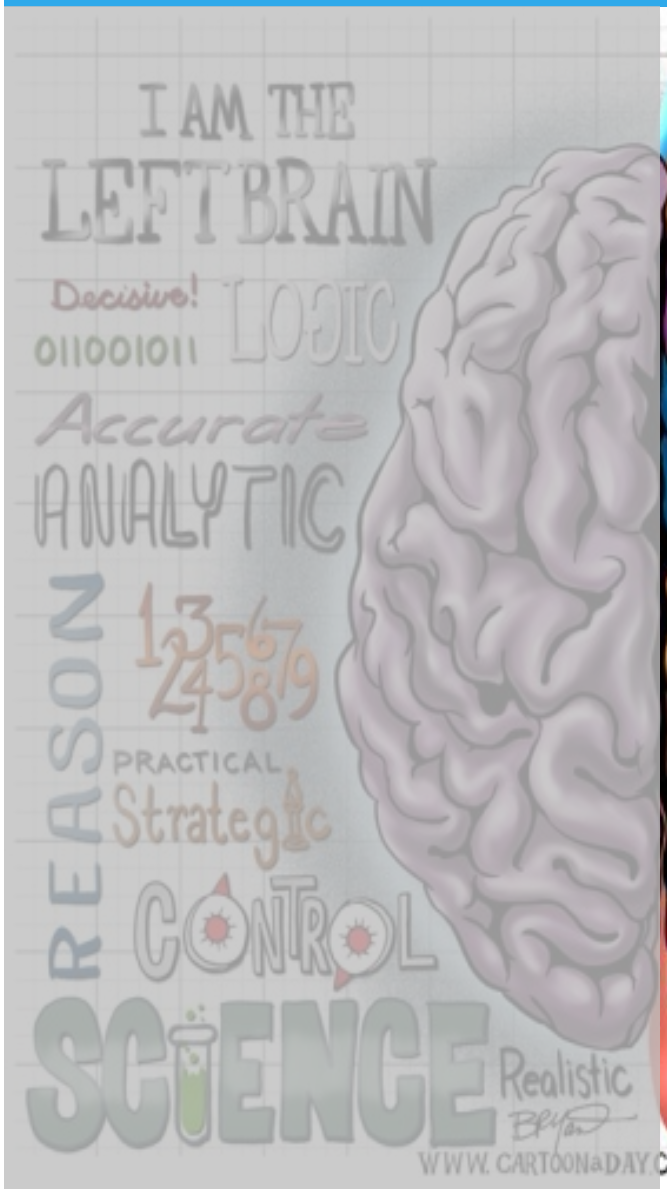
- Social Media CAN be strategic.
- Social Media can be content-rich.
- Social Media can grow your audience.
- Social Media can help you tell your stories.

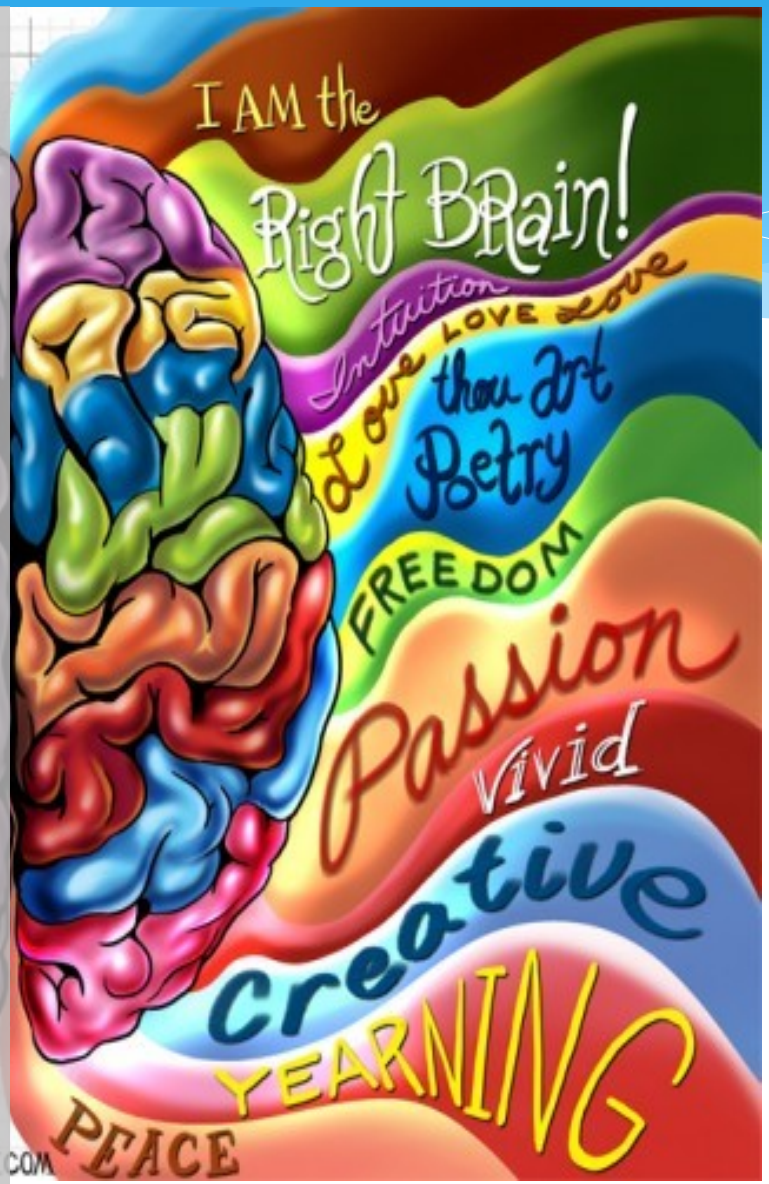
LEFT BRAIN: Let's create some plans!

START HERE!



RIGHT BRAIN: Let's create some fans!





{i'm a big fan.}

We do right brain tasks 363 days a year & have fun with our messages.

1. What is your **goal** – what do you want your communications to do?
2. Who is your **target** – who do you need to communicate to?
3. What **channels** do you have to communicate?

---

4. What is your **message** – what do you want to say (and why)?
   - To increase awareness
   - To inspire engagement
   - To increase support
   - To raise money
   - To tell your story

*Kelly Young, Baise Communications

Rationale for change…

But what if you're doing it wrong? by Seth Godin

Marketing doesn't have to suck.

It doesn't have to be a miserable experience for consumers, and it certainly doesn't have to be a distasteful, creepy or annoying task for the creator.

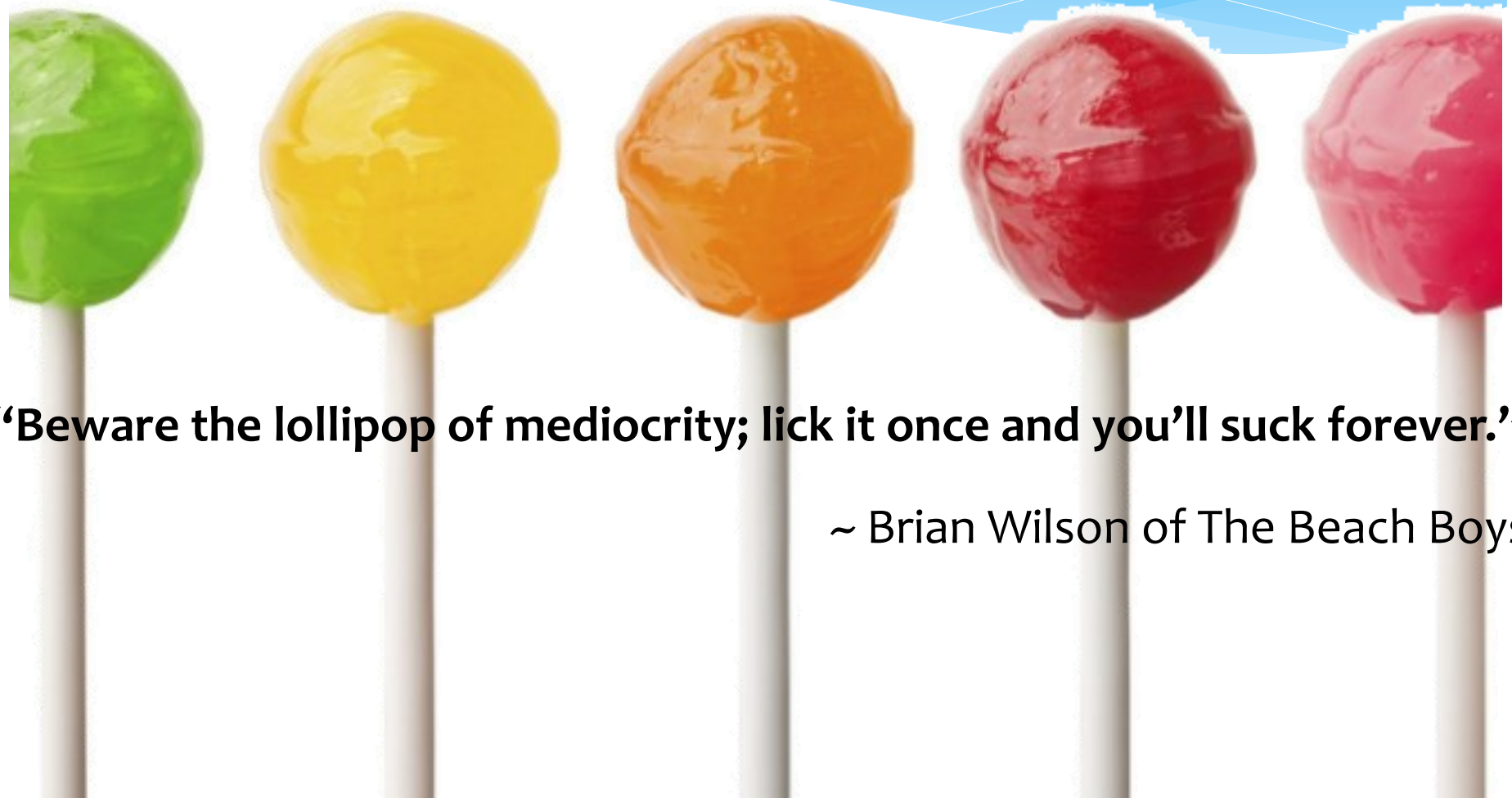
We don't have to **market at people**, pin them to the wall, target them, track them, stalk them, trick them, manipulate them and sell them things they don't want.

Not if we care enough to do something better.

The other kind of marketing, the marketing that's consensual, useful and effective, is possible. This is marketing that we eagerly connect with, marketing that we'd miss if it were gone.

I call this modern marketing, and it's easier than ever to do this effectively.

Rationale for change…



“Beware the lollipop of mediocrity; lick it once and you’ll suck forever.”

~ Brian Wilson of The Beach Boys

Is it Stamp-Worthy? Start with WHY!

Stamp-Worthy marketing has an obvious purpose and adds value in some way:

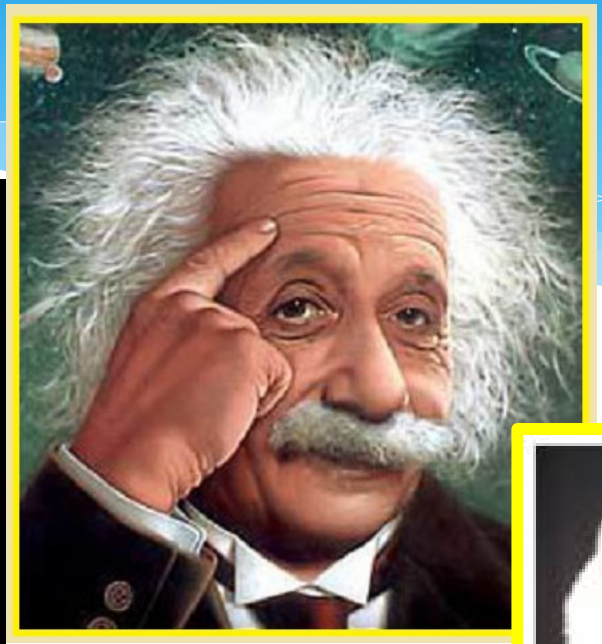
- **Are you EDUCATING them about something?**
- **Are you ASKING them for something?**
- **Are you THANKING them for something?**
- **Are you REPORTING successes, goals achieved?**

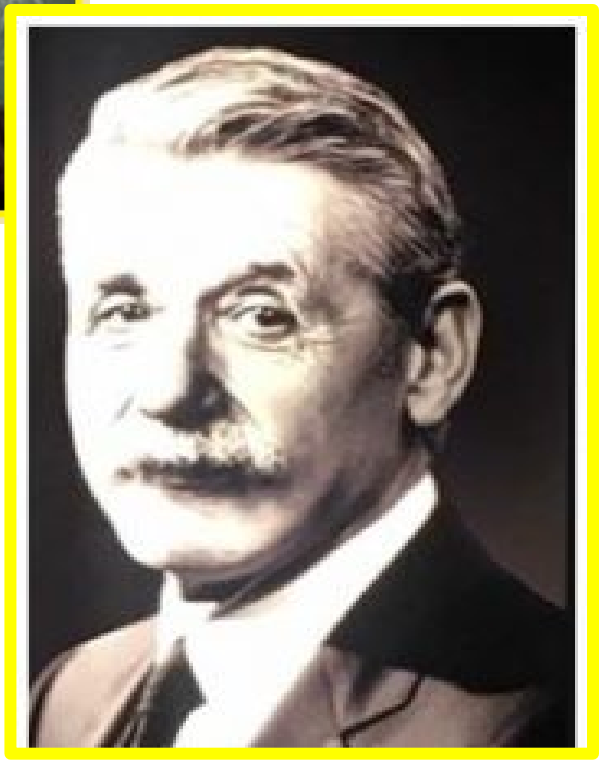
If you aren't clear about the purpose, how will they ever be clear about the purpose? **Why send it?**

What is a Creative Idea? **Simplification**

Any fool can make things more complex. It takes a touch of genius to move in the opposite direction.

Albert Einstein





Rationale for change…

<u>Different people hear differently</u> by Seth Godin

What you say is not nearly as important as what we hear.

Which means that the words matter, and so does the way we say them. And how we say them. And what we do after we say them.

It takes two to be understood. Not just speaking clearly**, but speaking in a way that you can be understood.**

Creativity is Intelligence Having Fun!

- Should be short & to the point
- Be memorable (catchy)
- Show how you're unique
- Make them smile, so they'll tell others about you

*Kelly Young, Baise Communications

Step #6: Educate

Create material people want to open and read!

NEW WORDS TO USE ON THE GOLF COURSE:

#207:	SAMMY HAGAR—The guy who fills out your foursome when a regular can't make it
#470:	SON-IN-LAW—OK shot, but not quite what you had in mind
#501:	U.S.G.A.—Ugly Shot, Go Again
#711:	DICK VAN PATTEN—Picking up your ball when "Eight Is Enough"
#999:	DANNY DEVITO—A nasty little 5-footer

Whether you golf like Jack Nicklaus or Bill Murray
we know that your generosity through the Community Foundation
is par for the course.

If only everyone could learn to hit a long bunker shot with ease or
to donate 5% annually to charity,
the world would be a better place indeed.

You're on your own with the long bunker shot,
but Lilly Endowment Inc. can help with the 5%!
Right now they are matching each donation to
the Community Impact Fund **$1 for $1!** **<insert golf clap here>**

Donations can be mailed to the Foundation
or made online at
www.GiveToGrant.org/Impact
and we will double your gift automatically.

As we all know, being generous can really be exhausting.
So once you're done, put down that checkbook, pick up those
clubs, and head to the nearest golf course.

We hope you'll use and enjoy the enclosed ball markers
as a reminder that 5% is all it takes to really
leave a mark on our community.

And, finally, we're not golf pros, but we've been told that each
donation to the Community Foundation entitles you to a mulligan.
"Always keep in mind that if God didn't want a man to have mulligans, golf balls wouldn't come three to a sleeve." -Dan Jenkins

Thanks for putting the **G**ame **O**f **L**ife **F**irst,
Your Community Foundation Team

Step #6: Educate

Create material people want to open and read!

Thanks to a $500,000 gift from Lilly Endowment Inc., donations made to existing endowed funds held at the Community Foundation of Grant County will be matched at a 2:1 ratio as a way to leverage your charitable dollars as a donor. That's right, the Foundation will grant your favorite endowed fund .50 cents for every $1.00 you contribute through December 31, 2014 or until the $500,000 in matching money is gone.

POTENTIAL DONATION	GIFT IV MATCH	TOTAL AMOUNT
$100	$50	$150
$1,000	$500	$1,500
$5,000	$2,500	$7,500
$25,000	$12,500	$37,500

WE'LL MATCH EVERY DONATION 2 TO 1

Step #6: Educate

Create material people want to open and read!

The Community Foundation of Grant County
505 West Third Street
Marion, Indiana 46952

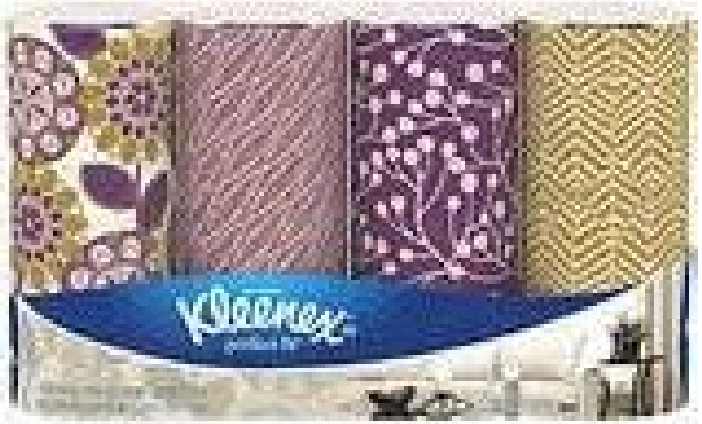
Recipient
Address
Address
Address

Happy Allergy Season! (Well, not exactly happy, but it's a real thing!)

If you are fortunate enough to be blissfully unaware of this VERY REAL season, then please pass these tissues on to someone who really needs them. Trust us, they won't be hard to find! **(Hint: *cough, cough*, sniffle, sniffle, achoooooo!)** And when you find them, tell them about the COMMUNITY FOUNDATION OF GRANT COUNTY and the fund you like to support most. (It's OK to pick a favorite!) Or let them know about our current $1 for $1 matching opportunity for donations made to the COMMUNITY IMPACT FUND. That's an immediate 100% return on your investme
good as having a tissue on hand when you have allergies...*almost.*

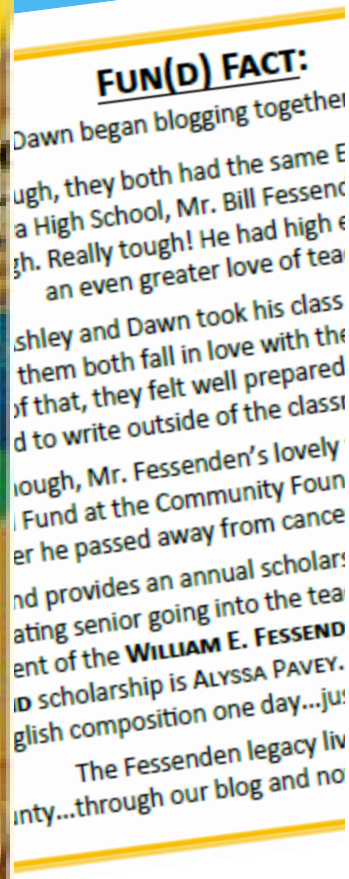
Enjoy the beauty that is…Autumn i

~Your Community



Step #6: Educate

Create material people want to open and read!



FUN(D) FACT:

Dawn began blogging togethe
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a High School, Mr. Bill Fessenc
gh. Really tough! He had high e
an even greater love of tea
shley and Dawn took his class
them both fall in love with the
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Fund at the Community Foun
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The Fessenden legacy liv
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Dear «Name2»;

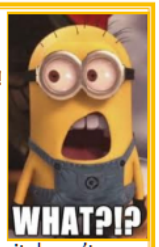
Well hello there loyal e-News Readers/Blog Follower! I bet you thought we had forgotten about you, didn't you? There you've been twice a month, every month, faithfully reading about all the good things going on at the Community Foundation and even learning a thing or two about the Community Foundation Team along the way.

We just wanted to drop you a quick line to say thanks! Thanks for your heartwarming replies, funny comments, encouraging words, social media shares with your friends and family, and your dedication to the work of the Community Foundation. We genuinely do feel like you are an extended part of our family. And just like all families, we're a little quirky sometimes. Okay, maybe a little bit more than a little!

That's probably why we loved the quote on the front of this card...

"WHEN LIFE GIVES YOU LEMONADE, MAKE LEMONS. LIFE WILL BE ALL LIKE, "WHAT?!?"

Although we haven't opened a lemonade stand (yet), life has given us some lemonade. It's bittersweet and highly symbolic of what we're going through right now...coping with someone we love leaving our team and going off to pursue bigger and better things. **YES**, I'm talking about the departure of *BLOGGER-EXTRAORDINAIRE, ASHLEY MCKNIGHT*. Ashley met her McKnight in shining armor and will be getting married and becoming the mother of four beautiful children in mere weeks. While we couldn't be happier for her (truly), we couldn't be sadder for us (truly). It's bittersweet. It's lemonade. Truly.



So, yeah, life just gave us some lemonade and we're sharing some of it with you. After all, you're the only ones that can help us turn that lemonade into lemons. And, when life gives you lemons, what do you do? You **THROW** them at something! **HARD!** We're planning to **BEAM** a lemon or two at child poverty and **CATAPULT** a few lemons at economic development. While we're at it, let's **CHUNK** a lemon slider toward our community's lack of identity and **ZIP** a 100-mph Nolan Ryan lemon fastball at some of our community's apathy and indifference. Let's take those lemons and give life, and all of Grant County, a reason to say **'WHAT?!?"**

Because even though things are changing, both at our office and in our community, it doesn't mean it's bad. It just means it's different. And, different we can handle. Different is very much like our blogs...and very much like you, our blog-followers. In fact, we love different. And maybe, just maybe, **'DIFFERENT'** is just the ingredient Grant County has been missing.

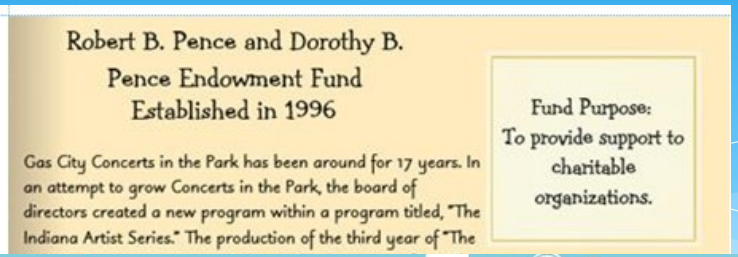
Besides, in the big scheme of things, it doesn't matter whether life gives you lemons or lemonade... you have to work with what you've got. That's why we're grateful we've got you!

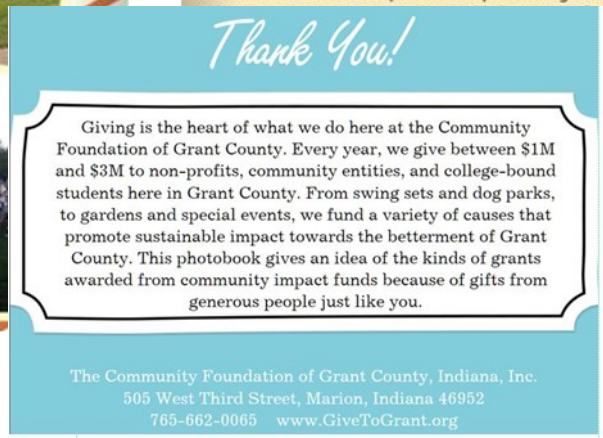
~The CF Team

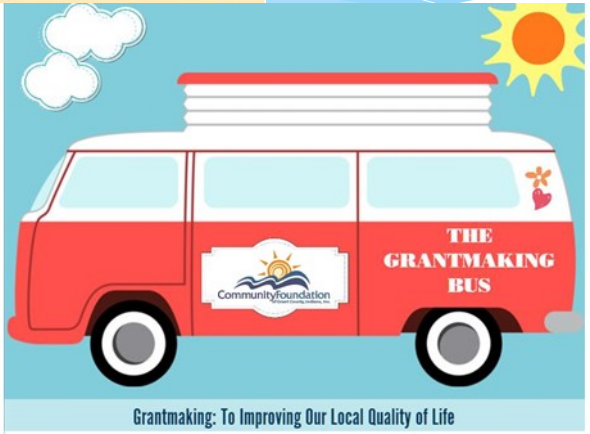
- ✓ Led to $50 gift from a local millionaire who we are 'courting'.

Step #6: Educate

Create material people want to open and read!







Dedicated to «Salutation»
in honor of your generous donations to
our community grantmaking funds.

When combined, these endowed donations allow us to support a variety of programs and projects for local non-profit organizations. Grants like this help them fulfill their missions and improve the overall quality of life for citizens in Grant County.

We hope you enjoy this booklet depicting a sample of some of the successful grants that were made last year because of your kindness and generosity.
This work would not be possible without you.

People like you are why we love where we live,
The Community Foundation Team

Step #6: Educate

Create material people want to open and read!

"Write something epic! - be daring and different."
~ Kelly Young, Baise Communications

Big Rocks and Beer

Sooner or later everybody has a first job. These days, it seems like the older you are the younger you were when you had your first money-making venture. I was doing an icebreaker activity at church once when we all had to share what our first dip was in the career pool. There were a few babysitters and lawn mowers. A lifeguard. A hod carrier. A corn detassler. A couple of camp counselors, an umpire, and, some that asked if you'd like fries with that. Are you thinking back to your first job? When you first started to develop a work ethic? When it was my turn, I nonchalantly told them that my first job was loading gunpowder into bullets for my neighbor…a dime per bullet. Apparently, that's not normal. I mean the looks on their faces clearly showed that. I guess I never really thought about it. It was my normal. I was 8 or 9 at the time and happy to have my first paid gig. I mean someone's got to put the gunpowder into the brass, right? If it makes you feel any better, my neighbor was a police officer… does that help?

Not too long ago, I was having a cup of coffee with one of my favorite donors and for some reason our first jobs came up. He mentioned that at a very young age, probably around 5, that his parents 'hired' him for his first job. With a big pile of rocks in front of him, it was his job to remove the little rocks and place them in a coffee can that they provided—I picture an old empty metal Folger's can. Once the can was filled, he would show his parents, and then empty it into a new little rock pile to earn a whole nickel per can. A nickel a can! Granted, this would have been in the 1930's, but even so, that's a lot of work for a nickel. You can see why my

Pringling

If memory and reality become confused, perhaps that's as it should be. I have no idea where I first heard that phrase. With so many different mediums entering our brains these days, it's hard to recall the source, but I like the idea.

For example, I remember the time that Griffin and a couple of friends found themselves in the most massive of pickles when they handcuffed Dalton to the bannister downstairs. OMGEEE! Now in many households this wouldn't be a big deal. Those plastic handcuffs they sell at the dollar store can be broken easily. But, when your dad is a cop, the handcuffs are real. I had no idea where the keys were and neither did the boys. Barring a pair of bolt cutters, those puppies weren't coming off without the key. There was scurrying and problem-solving and a bit of panic. I don't know if they were as concerned about giving Dalton his freedom or the fact that daddy was going to be home soon. The clock was ticking!

Eep Opp Ork Ah-Ah (that means I Love You)

You migh… eclectic… working a… the little t… week, I g… the new s… before the… playlist. … that's not… of-this-world 1962 classic sung by Jet Screamer with a b… Jetson, called **Eep Opp Ork Ah-Ah (that means I Love You).**

George can jam. Seriously, that dude knows how to rock out. The drum solo in this song his daughter Judy's penned, Eep Opp Ork Ah-Ah (that means I Love You), was performed on the show, *The Jetsons*, and was

m alone that he even tried saying, '*You can do it!*' (It' …ly, *Zoom!*' Apparently, that … knew how to woo the girls

Make America Grit Again

Dinner at our house is often unpredictable. It's this daily dance we do of asking, *"What do you want? I don't know, what do you want?"* We typically end up deciding with everyone answering this question, *"What don't you want?"* That eliminates a lot of options and narrows it down enough to choose. Sometimes our son decides on his own. Last week he made a DiGiorno's pizza and topped it with a Totino's pizza. I'm not kidding, we had a pizza topped with a pizza. It might not have been predictable, but I didn't have to decide or cook that night, so I count that as a victory in my book.

Flat Hats and Flowers

It was a Thursday night about 7:00 p.m. when my husband arrived at the MGH Emergency Room. It wasn't a life-threatening event, but our 2-year-old son, at the time, fell in the slippery bathtub and hit his chin just right. Just right means a small gash that left the bathroom looking like a crime scene on CSI Las Vegas. As a police officer, my husband works well under pressure, so he handled the blood, stitches, and tears like a champ. He even managed to clean up the mess, give the boys a bedtime snack, and tuck them in—all before I made it home for the night. You see, I didn't even hear about all of the 'excitement' until I arrived home at about 10:30. I was at my night class, just as I had been every Thursday night for the past two years. It wasn't easy getting a Master's Degree when my kids were only 2 and 5–having a superhero husband helped.

Let's be realistic, life is messy…glitter messy. And, frequently (read: all the time) when I was working full-time and completing my second degree, my house resembled the before picture of any home improvement show. True, there was one time I panicked when I realized that my kids knew the theme song to the show, *Cops… ♪♫♯ "Bad boys, bad boys, whatcha gonna do? Whatcha gonna do when they come for you?" ♪♫♯* But, overall, they were happy, healthy, and loved. They bonded with Daddy on Guy's Night and gained an appreciation for learning as they watched me stu… presentations. In fact, …

Ashley Frank [1-August-17-9:12:42] Rep…

Great stuff! I love the "aim low" idea. My husband always says, "Don't despise small beginnings." That concept has encouraged us numerous times. Blessings on each of you!

Sandie Graf [21-June-17-10:29:32] Rep…

What a nice story about your family and Sheriff Nevels. I am sure his personality will be missed.

Bill Sparks

Love this… great job!

Sherry Barnes [23-May-17-4:03:39] Reply

Oh Dawn, this message brings back so many memories. My kids were teenagers (I was single) when I was going through the program, my class was on Monday nights. I found out years later, after they were grown, that they called it "Monday night fun night." Luckily, they only told me a few of things they did on those nights. We all survived and they thought it was hilarious when they told me, and they probably have some good memories of all the stuff they got away with. (cringe)

Step #6: Educate

Create material people want to open and read!

February 23, 2017

Rybolt Funeral Home
314 N Washington St
Swayzee, IN 46986

Dear Friends,

My father-in-law died recently. It was just before Christmas. It was unexpected. It was difficult. Being in the funeral business, you know how important it is to the healing process to have friends and family attend the calling and the funeral. They offer support and sympathy, love and laughter as they recall fond memories of someone you both loved. I will forever miss my father-in-law, but I will always cherish the people who came to pay their respects.

While the love and support of our friends and family was expected, one thing wasn't: all the flowers! After the funeral, we sent the young men in the family back to the funeral home to load up the flowers and take them home. One hour and one entire van jam-packed with flowers later, the entire house was full... it felt like a mini-funeral home, only more claustrophobic. Truly, nothing against flowers or those who create such beautiful arrangements—it was overwhelming.

Flowers are beautiful and often an important part of a funeral, but you really can have too many! That's why I wanted to remind you of a memorial alternative that is equally thoughtful—making a charitable donation in lieu of flowers.

Donations are frequently given to the Community Foundation as a tribute to a loved one. It's really easy to do, too. But, not everyone knows it's a possibility...that's where you come in! It's as easy as 1-2-3:

1. Put donation information in the obituary.
2. Make donation envelopes available at the funeral.
3. Have the family contact the Community Foundation w/in 90-days to finalize donations.

That's it! The fact is, Grant County is the 3rd most generous county in the state of Indiana! Memorial giving is simply one additional way to encourage the generous people of our county to support charity while memorializing someone they dearly love.

Together, I hope we can forge a partnership that helps keep charitable giving as a viable option when honoring a loved one. There is truly nothing wrong with flowers, but I do think it's worth offering charitable giving as an option to your clients as they pre-plan and plan their funerals.

If you'd like to talk about this further, I'm happy to come out and speak to you and your team. We could go over any questions that would put you at ease about recommending giving in lieu of flowers as a choice to those you serve.

Peace and Blessings,

Dawn Brown
Executive Director
Dawn@GiveToGrant.org

CHARITABLE DONATIONS CAN BE MADE AS A TRIBUTE TO YOUR LOVED ONE

At times of sorrow when friends or family pass away, it's a lovely gesture to make a donation in their memory. These donations will help to create a lasting legacy for the future of Grant County and continue to improve the quality of life for all Grant County residents. All tributes are viewable online and on the Giving Tree in the lobby of the Community Foundation.

TELL YOUR FRIENDS AND FAMILY VIA THE OBITUARY:

No paperwork needs to be signed with the Community Foundation in order to direct friends and family to make memorial, tax-deductible donations as a tribute to your loved one. Simply place the following language in the obituary and the Foundation can automatically accept donations in memory of your loved one:

> In lieu of flowers, donations may be made in memory of <name of the deceased> to the Memorial Fund held at the Community Foundation of Grant County, 505 West Third Street, Marion, IN 46952 or online at www.GiveToGrant.org/Memorial.

USE THE DONATION ENVELOPES PROVIDED:

We designed a postage-paid donation envelope for those donating in memory of a loved one at the time of a funeral. The funeral home has access to these donation envelopes and can contact us to acquire more at any time. Donation envelopes can be left at the funeral home or friends and family can take an envelope home to mail a donation to us later, when it might be more convenient.

> These donation envelopes can be dropped in the mail by the funeral home or the donor. All donations made to the Community Foundation are tax-deductible and the donors will receive a tax receipt directly from the Community Foundation. Additionally, we'll keep records of all donors/addresses and mail these to the family when we process the donations so you can thank them for their generosity when time allows.

CHOOSE A CHARITY YOU WOULD LIKE TO SUPPORT:

Within 90-days after the funeral, someone from the family should contact Dawn Brown at the Community Foundation to discuss the charity that you would like the donations to benefit. This might mean starting a fund at the Community Foundation in your loved one's name or it could mean using the donations to make a gift to your favorite charitable cause in your loved one's name. The Community Foundation will be able to help you with your charitable options and encourage local giving choices whenever possible. However, if you don't call to specify what charity to benefit, it's not a problem. The donations will be placed in the Foundation's Community Impact Fund to support Grant County charities. So, all donations will be put to good use!

> These donations cannot benefit specific individuals or pay for funeral expenses, but they can be donated to an official 501(c)(3) non-profit organization.

COMMUNITY FOUNDATION ACCREDITED

Contact the Community Foundation for additional information:
Dawn Brown, Executive Director
Community Foundation of Grant County
505 West Third Street, Marion, IN 46952
765-662-0065 · Dawn@GiveToGrant.org
www.GiveToGrant.org/GivingTree

CommunityFoundation of Grant County, Indiana, Inc.

Step #6: Educate

Create material people want to open and read!

Toilet paper math is the hardest kind of math

Dear < >,

I despise doing public math. No one needs that kind of negativity in their life. But, toilet paper math? Whose evil idea what that? Do I get a better value for 12 Mega Plus or 30 Double Plus? NOBODY KNOWS!

That's why I like our Community Foundation math so much better. ☺

Thanks to a new $1M matching gift from Lilly Endowment Inc., we can now ***TRIPLE*** all donations to the Community Impact Fund. Isn't that incredible?

From now, until the matching money is depleted, for every $1 you donate to the Community Impact Fund—that's the fund that allows us to do grantmaking—we will match it with $2 from Lilly → $1 + $2 = $3.

See, Charmin…math doesn't have to be complicated. But it should **show you** that you're making a good investment.

To take advantage of this amazing charitable investment, consider a donation today!

Donate online via a credit or debit card by **clicking here**.

Or feel free to mail one in to:

Community Foundation of Grant County
ATTN: 123 Match
505 West Third Street
Marion, IN 46952

And, as always, if you have any questions, please feel free to contact me at Dawn@GiveToGrant.org or 765-662-0065.

May the math be with you,

Dawn

Step #6: Educate

Create material people want to open and read!

«Salutation», this is why I'm amazed when I hear really great singers belt out a song effortlessly.

It's literally music to my ears—I simply cannot imagine notes like that coming out of my mouth and landing in your ears—the phrase 'make a joyful noise' comes to mind. Think about the greats like Aretha Franklin and Prince, Kurt Cobain and Michael Jackson, or Bob Marley and Amy Winehouse. As they say down south, **"Those folks can sang'**!"

True Story:

When I was in college, I had to take a music class where the requirement was to play an instrument and sing on key in order to receive an **A** for the semester. At that time, the only **A-** I had ever received was my blood type, so I was really shooting for that **A**. However, there was one problem. I'm tone deaf. But, the professor was seasoned, hopeful, and happy to teach me—all I had to do was stay after class two times a week for 20 minutes and practice with him. I did that...for an entire semester... because hard work pays off, right?

Despite all the time practicing, I recall the very last class as if it were yesterday. He said, and I quote, **"Honey, you just can't sing."** LOL! I tried to tell him! Despite all of his teaching experience and my stick-to-itiveness, the acoustics of my shower simply didn't translate into the real-world. I had failed. I guess to a degree, so had the professor. And, although he gave me an **A** for effort, to this day, I still can't sing on key.

ke them. I'd love sing my favorite hymn or Top 40 hit

be like them at all...each and every one of these
's literally so sad.

e talented, wealthy icons didn't even think of what
ere gone from this earth. Don't be that person!

who inherits your estate? Yep, the state...as in the
t knows how to handle your hard-earned assets
er to that!

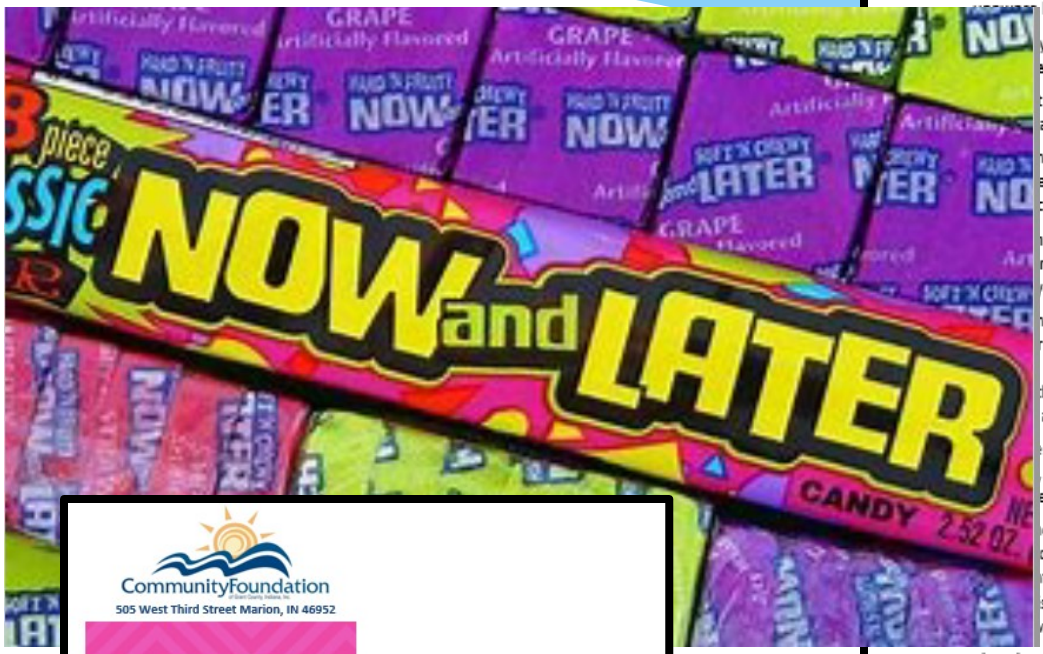
ning the courts as 'interested parties' of her estate.
e personal representative. Who knows how that
nksgiving dinner sound like a fun time this year.

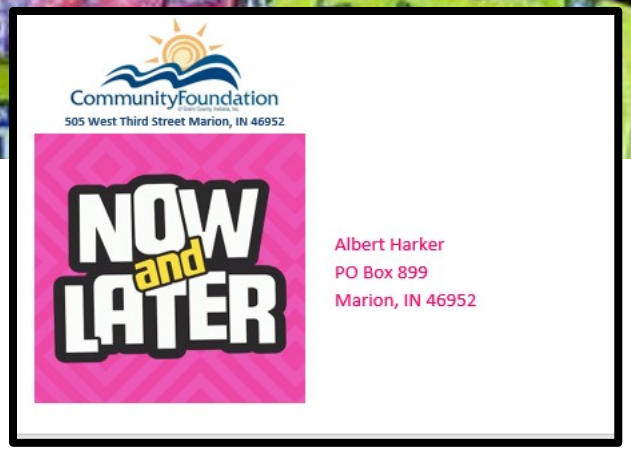
an avoid one BIG mistake they made in life by
w small, your financial advisor and attorney can
re best left to your family and to charity.

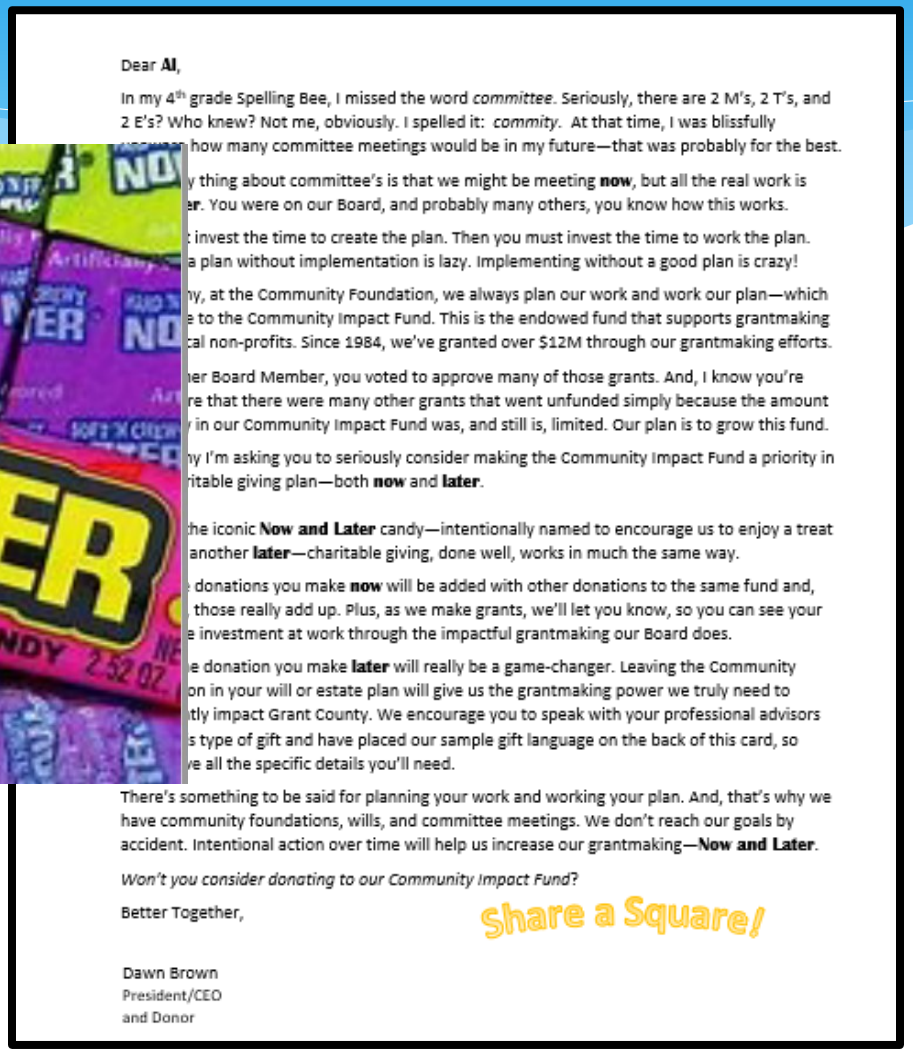
nt to leave your kids assets that will be taxed up to 60%. Heavily taxed assets, like IRA's, IRAs, 401(k)s, 403(b)s, 457(b)s, Section 408 Plans, Keough Plans, or Pension Plans, might be better left to your favorite charity—but that requires a plan.

Step #6: Educate

Create material people want to open and read!







Dear **Al**,

In my 4th grade Spelling Bee, I missed the word *committee*. Seriously, there are 2 M's, 2 T's, and 2 E's? Who knew? Not me, obviously. I spelled it: *commity*. At that time, I was blissfully how many committee meetings would be in my future—that was probably for the best.

y thing about committee's is that we might be meeting **now**, but all the real work is er. You were on our Board, and probably many others, you know how this works.

invest the time to create the plan. Then you must invest the time to work the plan. a plan without implementation is lazy. Implementing without a good plan is crazy!

y, at the Community Foundation, we always plan our work and work our plan—which to the Community Impact Fund. This is the endowed fund that supports grantmaking cal non-profits. Since 1984, we've granted over $12M through our grantmaking efforts.

er Board Member, you voted to approve many of those grants. And, I know you're re that there were many other grants that went unfunded simply because the amount in our Community Impact Fund was, and still is, limited. Our plan is to grow this fund.

y I'm asking you to seriously consider making the Community Impact Fund a priority in itable giving plan—both **now** and **later**.

he iconic **Now and Later** candy—intentionally named to encourage us to enjoy a treat another **later**—charitable giving, done well, works in much the same way.

donations you make **now** will be added with other donations to the same fund and, those really add up. Plus, as we make grants, we'll let you know, so you can see your e investment at work through the impactful grantmaking our Board does.

e donation you make **later** will really be a game-changer. Leaving the Community on in your will or estate plan will give us the grantmaking power we truly need to tly impact Grant County. We encourage you to speak with your professional advisors s type of gift and have placed our sample gift language on the back of this card, so e all the specific details you'll need.

There's something to be said for planning your work and working your plan. And, that's why we have community foundations, wills, and committee meetings. We don't reach our goals by accident. Intentional action over time will help us increase our grantmaking—**Now and Later**.

Won't you consider donating to our Community Impact Fund?

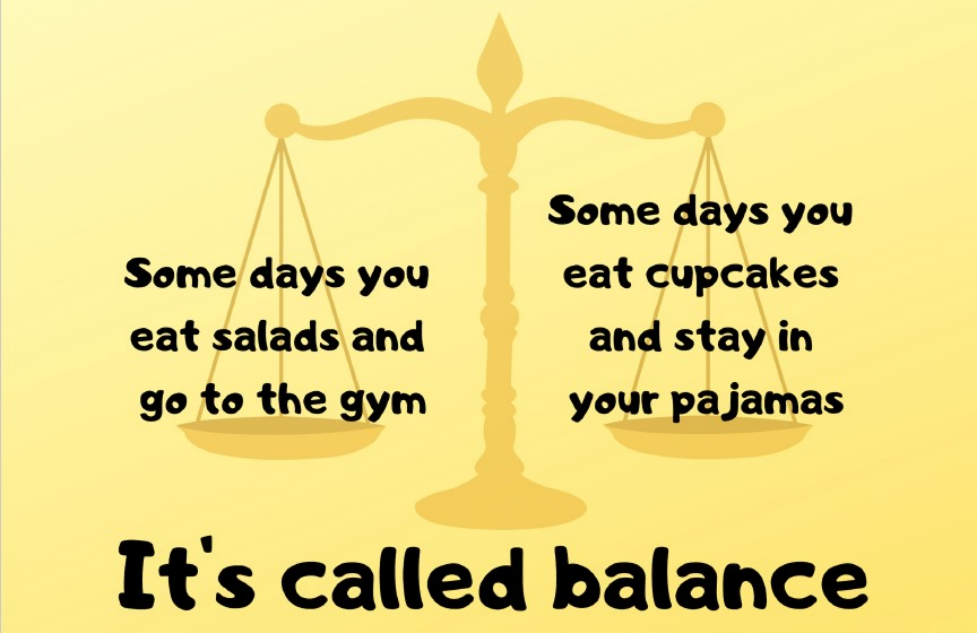
Better Together,

Share a Square!

Dawn Brown
President/CEO
and Donor

Step #6: Educate

Create material people want to open and read!



CommunityFoundation
of Grant County, Indiana, Inc.

April 7, 2019

«Name»
«Organization»
«Address1»
«Address2»
«CityStZip»

Dear «Salutation»,

Work-life balance, don't put all your eggs in one basket, balanced diet: life is all about balance. Your funding sources for your nonprofit should be too. By diversifying your funding streams, you create stability, and it keeps you from being overly dependent on one source of funding, which is dangerous.

When you have a lot of fundraising strategies working for you, you can lose one and it's not fatal. Imagine an organization that funds most of its budget from a single state grant. Then the state starts cutting their budget and grants are reduced. This means that this organization would be riding the struggle bus. They had no other income streams—no earned income from programs, no fundraising from individuals, no private foundation grants, nothing. Even if the organization is well established, day-to-day operations can quickly turn into crisis mode.

So, what does it look like to have diversified revenue for your nonprofit? It seems like a good mix of events, grants, appeals, online giving, monthly giving, and so forth. But even with all that, no one grant, event, or donor should make up more than 25% of your total income. The only exception to this rule is an endowment.

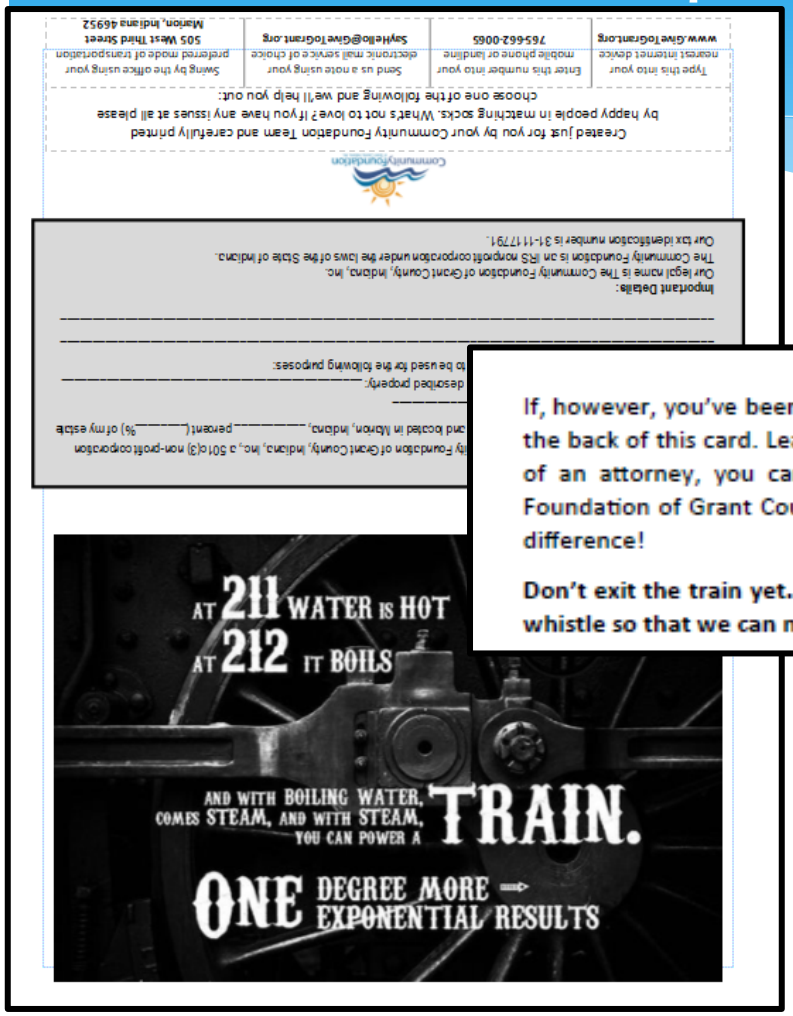
That's where the Community Foundation comes in. Though we do provide grants to nonprofits and charitable causes, there is no guarantee that a program will be granted or granted multiple years. Endowments are the only guaranteed, annual funding source. If you have an endowment with the Community Foundation, you can count on us to send your organization a check every January with 4% of your quarterly balance over a 5-year average. This income stream is perfect, because you don't have to earn it or solicit it, but you can budget for it!

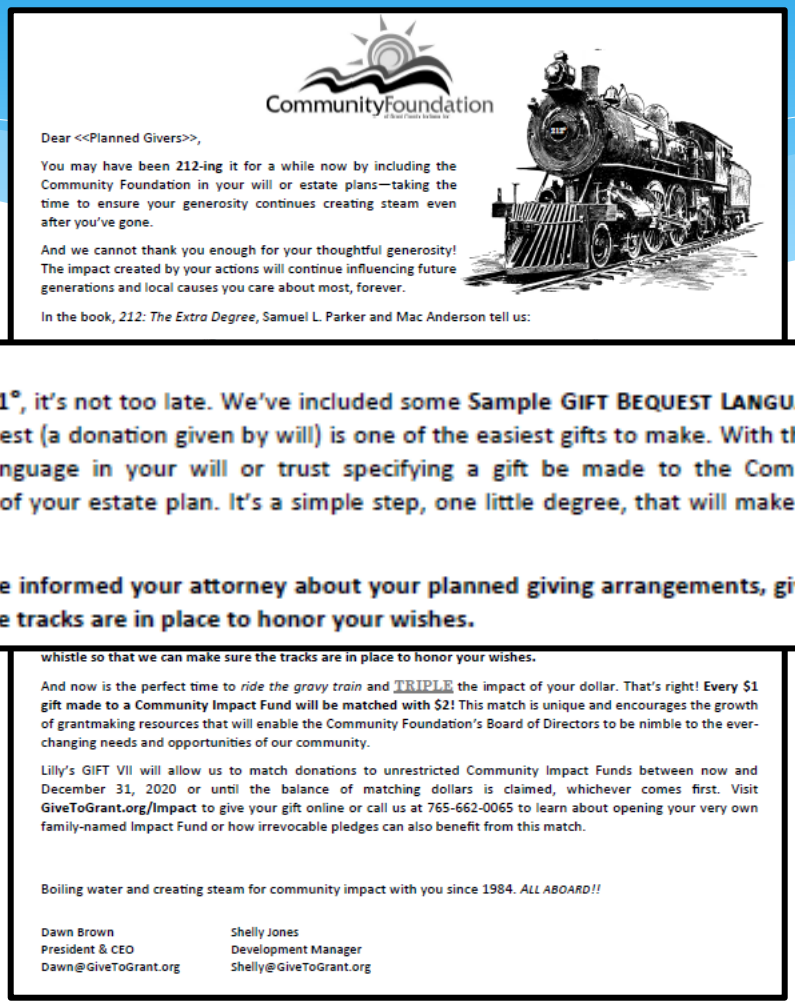
Let us know if you would like more information on opening or growing an endowment for your organization.

Meagan McCracken
Grants Manager

Step #6: Educate

Create material people want to open and read!





Dear <<Planned Givers>>,

You may have been **212-ing** it for a while now by including the Community Foundation in your will or estate plans—taking the time to ensure your generosity continues creating steam even after you've gone.

And we cannot thank you enough for your thoughtful generosity! The impact created by your actions will continue influencing future generations and local causes you care about most, forever.

In the book, *212: The Extra Degree*, Samuel L. Parker and Mac Anderson tell us:

If, however, you've been stuck at **211°**, it's not too late. We've included some Sample **GIFT BEQUEST LANGUAGE** on the back of this card. Leaving a bequest (a donation given by will) is one of the easiest gifts to make. With the help of an attorney, you can include language in your will or trust specifying a gift be made to the Community Foundation of Grant County as part of your estate plan. It's a simple step, one little degree, that will make all the difference!

Don't exit the train yet...after you've informed your attorney about your planned giving arrangements, give us a whistle so that we can make sure the tracks are in place to honor your wishes.

whistle so that we can make sure the tracks are in place to honor your wishes.

And now is the perfect time to *ride the gravy train* and TRIPLE the impact of your dollar. That's right! **Every $1 gift made to a Community Impact Fund will be matched with $2!** This match is unique and encourages the growth of grantmaking resources that will enable the Community Foundation's Board of Directors to be nimble to the ever-changing needs and opportunities of our community.

Lilly's GIFT VII will allow us to match donations to unrestricted Community Impact Funds between now and December 31, 2020 or until the balance of matching dollars is claimed, whichever comes first. Visit **GiveToGrant.org/Impact** to give your gift online or call us at 765-662-0065 to learn about opening your very own family-named Impact Fund or how irrevocable pledges can also benefit from this match.

Boiling water and creating steam for community impact with you since 1984. *ALL ABOARD!!*

Dawn Brown
President & CEO
Dawn@GiveToGrant.org

Shelly Jones
Development Manager
Shelly@GiveToGrant.org

Created just for you by your Community Foundation Team and carefully printed by happy people in matching socks. What's not to love? If you have any issues at all please choose one of the following and we'll help you out:

Type this into your nearest internet device	Enter this number into your mobile phone or landline	Send us a note using your electronic mail service of choice	Swing by the office using your preferred mode of transportation
www.GiveToGrant.org	**765-662-0065**	**SayHello@GiveToGrant.org**	**505 West Third Street Marion, Indiana 46952**

Important Details:
Our legal name is The Community Foundation of Grant County, Indiana, Inc.
The Community Foundation is an IRS nonprofit corporation under the laws of the State of Indiana.
Our tax identification number is 31-1117791.

CommunityFoundation

_____ ity Foundation of Grant County, Indiana, Inc., a 501(c)(3) non-profit corporation
_____ and located in Marion, Indiana, _____ percent (_____%) of my estate
_____ described property: _____
_____ to be used for the following purposes:
_____
_____
_____

Step #6: Educate

Create material people want to open and read!

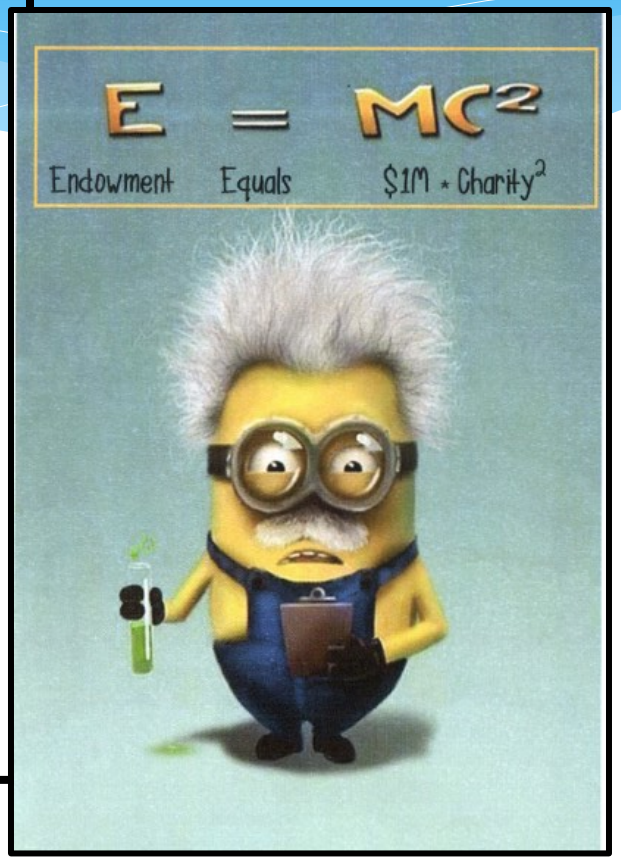
Believe it or not, it gets even better! Along with the special calculator that Lilly uses to put extra commas in their checks, they've also mastered the scientific phenomenon of cloning. It's true! They have agreed to **TRIPLE** all donations made to the **Community Impact Fund**—that's the fund our Board uses to make grants quarterly, to the non-profit charities who apply, as a way to fund projects and programs that advance their mission to serve our community. Since we began in 1984, we've awarded $18,353,432 through our own grant-making program! Maybe we do have one of those special calculators after all!

IT WORKS LIKE THIS:

$500 donation to the Community Impact Fund
+ $500 Lilly Clone #1
+ $500 Lilly Clone #2
= $1,500 total gift!

But, don't worry if you have another favorite endowment you'd like to give to—you still can, it just won't be cloned, I mean matched.

You know we like to have fun with our letters to you—working with generous people is awesome and really does make us happy! But, in all seriousness, I genuinely hope you'll consider this gift of thanks. Feel free to use the envelope enclosed or donate online at: **www.GiveToGrant.org/Impact**.



Step #6: Educate

Create material people want to open and read!

Donor-Relations Tips:

- Create a donor communication plan
- Make donors feel like part of the team
- Write for your readers
- Appeal to your readers' emotions
- Talk about YOU and WE
  (not I and me)
- Create a two-way communications

*Kelly Young, Baise Communications

Creativity is Intelligence Having Fun!

- Tell what you do
- Be direct, specific
- Keep in mind people give because they :
  - Believe in the mission
  - Believe that the organization is stable
  - Feel involved and valued
  - Highly regard the leadership of the organization

*Kelly Young, Baise Communications

Step #6: Ask

Create material people want to open and read!

CommunityFoundation of Grant County, Indiana, Inc.

Instructions for
Stock Transfer
to an
Endowed Fund (w)

Date _____ Donor(s) Name(s) _____

To Whom It May Concern:

_____ shares of _____
umber of shares name of security

Description_____

Certificate date _____

e Community Foundation of Grant County, Indiana, Inc,

_____ Fund.

d "Account #3609-8043" on delivery advice

d "Account #3609-8043" on delivery advice

_____
Joint Donor's Signature

_____
Joint Donor's Printed Name

e Community Foundation

p 765.662.0065
f 765.662.1438
QuickQuestion@GiveToGrant.org

Genecese R. Gottschalk
674 Sanders Rd
Franklin, NC 28734

Dear Genecese:

Welcome to 2017 in Indiana! If you don't like cold and snow, wai
will change. One thing I know for sure is that this time of year is p
chicken chili *and* donating stock to the Community Foundation. I
benefits your family's tummy, and the other benefits the whole co

Donating stock is almost as simple as calling your investment adv
to do it! This is especially important for those of you who have a
Distribution (RMD) that you'd like to donate directly to charity. J
attached stock transfer form, or tell them to contact us for instruct
stock from your account to the Foundation account. You will prob
signature on your end, but that's about it. It's one of the easiest wa

If you have any questions about the enclosed quarterly fund report or h
property, please call or email us. We love working with you to build the
your family, and the community.

Warmly,

Sherri Rush
Donor
Sherri@GiveToGrant.org

Dawn Brown
Donor
Dawn@GiveToGrant.org

...and the rest of the Foundation Team

This led to a $205,000 stock gift w/in 6 weeks.

Step #6: Ask

Create material people want to open and read!

April 13, 2017

Dear «Salutation»,

Is today the day? All eyes are on April and Oliver! They captured the hearts of millions and became the star of their very own live streaming video. Fans are hoping to capture the moment April finally gives birth to her already infamous offspring.

She could deliver her baby at any moment now as she prepares for the final stage of her long pregnancy. Giraffe's can carry their young for up to 15 months. The calf will weigh around 150 pounds and be about six feet tall at birth.

Over 24 million fans have tuned in to view the livestream video. You can join them online here at: www.AprilTheGiraffe.com

The excitement surrounding April is inspiring. Just like the excitement we feel when an individual makes their first donation to benefit the future of Grant County. You recently joined the family of people who have selflessly given to the Community Foundation. Those gifts have created a legacy that will live on forever in Grant County. We cannot thank you enough for your generosity.

The Community Foundation of Grant County was established in 1984 as an organization that could pool these resources for the benefit of improving the local quality of life. We serve as a means through which those of us who live, or earn a livelihood, in Grant County could continue to invest in our community. Thank you for taking part in that mission; connecting people who care with causes that matter.

Did you know, there are several ways you can give to the Community Foundation? Enclosed is a Ways to Give document explaining those options further. Giving even 5% of an asset would make a remarkable difference for the future of Grant County.

But if you aren't ready to make another gift to the Community Foundation, you might consider following us on these social media platforms and sharing with your friends about the good things happening in Grant County.

GiveToGrant	@GiveToGrant	Give To Grant

You can also sign up to receive our email newsletter by emailing Shelly Jones at Shelly@GiveToGrant.org. Call us if you have any questions. 765-662-0065

There's a lot to love about our community—let us keep you posted throughout 2017!

Shelly Jones
Development Manager

CommunityFoundation of Grant County, Indiana, Inc.

WAYS TO GIVE
Gift Planning Quick Guide

Gift	How and Why
Outright Gifts	
Cash/Check	Drop by the office with cash or mail a check with your specified fund name written in the memo line. Or use your credit/debit cards online at GiveToGrant.org/Marketplace and choose a fund you would like to support. It's easy to make a donation like this; plus, you get an income tax charitable deduction for the full amount of the gift.
Securities	Typically, this is a transfer to charity of an appreciated asset (stocks, bonds) held for more than one year. You'll receive an income tax charitable deduction for the full fair market value of the gift; additionally, no capital gains tax payable on assets appreciated value.
Closely Held Stock	Business owner gives stock to charity and then the business may repurchase same stock. Fair market value of stock is deductible as a charitable contribution; donating stock can help you avoid capital gains liability, too.
Tangible Personal Property	You can donate property to charity. Income tax deduction for full market value is available if gift property is used by the charity for its exempt purposes (otherwise, deduction is limited to adjusted cost basis). Qualified appraisals are often necessary.
New Fund	The minimum fund balance for a new fund is $5,000 and we allow 24 months to accrue that total amount. Opening a fund of your own will directly support the cause(s) you are passionate about…forever!
Revocable Gifts	
Bequest	The use will be to direct your donation to a charity upon your death. The estate tax charitable deduction will be for the value of the gift; donor retains use and control of donation intended as bequest gift. This is the most popular form of planned gift.
Revocable Living Trust	You can set up a trust that directs disposition of assets, including gifts to charity; trust can be revoked or changed. Minimize costs and delays of probate; facilitates transfer of assets plan; is private, not public (unlike a will); continuity of asset management in the event of death or disability.
Retirement Plan Assets	Charity named as percentage beneficiary of retirement plan assets. May have estate planning benefits because income in respect of a decedent (IRD) is taxable to heirs, but not to charities.

Contact the Community Foundation of Grant County, Indiana, Inc. with questions.
765-662-0065 | 505 West Third Street · Marion, Indiana 46952 | GiveToGrant.org

Step #6: Ask

Create material people want to open and read!

SUPERHEROES:
ORDINARY PEOPLE WHO DO EXTRAORDINARY THINGS.

THAT'S YOU!

Dear «Salutation»,

IS IT THE FLU? IS IT ALLERGIES? NO, IT'S THE ELECTION!

We've received multiple reports of ***LOCAL SUPERHEROES*** coming down with awful migraines. Who knew that ***SUPERHEROES*** got headaches, too? As you can tell from this card, even a man as strong as ***BATMAN*** can't withstand the magnitude of controversy this election season brings.

However, headache or not, we know that ***A SUPERHERO MUST ALWAYS RESPOND TO A CALL FOR HELP***...even if the odds are stacked against him. Voting is one of your superpowers that can help save the day! But, with an election year like this, some pain reliever may be just what the doctor ordered to ***ALEVE*** any political headaches brought on by (a) negative ads, (b) long lines at the polls, or (c) Facebook posts that make you want to scream.

See, saving the day can be messy. But never fear! Your trusty sidekick, the Community Foundation, is here! Every ***SUPERHERO NEEDS A SIDEKICK***—because saving the day is more fun with a friend. When it comes to local impact, voting is key...but, donating to the Community Impact Fund packs a pretty hefty punch, too!

Giving to the ***COMMUNITY IMPACT FUND*** is one way you can ***SAFEGUARD AND INFLUENCE*** our community through your generosity. Donations made at www.GiveToGrant.org/Impact amplify the impact of the grantmaking we provide to local non-profits—also fellow Grant County superheroes. Every donation is appreciated, and when combined with others, helps us give larger grants every year. Won't you consider making a donation?

Until then, we hope this ***ALEVE*** will bring you the ***STRENGTH*** you need to get you through this election and to your polling place with ease.

From your Community Foundation Team,

Election 2016

It's giving me a headache!!

Step #6: Ask

Create material people want to open and read!

CommunityFoundation of Grant County, Indiana, Inc.

Community Impact Fund

Giving is the heart of what we do here at the Community Foundation. Every year, we give between $1M and $3M to non-profits, community entities, and college-bound students here in Grant County. From swing sets and dog parks, to gardens and special events, we fund a variety of causes that promote sustainable impact towards the betterment of Grant County. The photo strip below gives an idea of the kinds of grants awarded from this fund because of gifts from people like you.

nd	**Science Central** Grant County Elementary and Middle School STEM Program $5,000	**Main Street Marion** Downtown Beautification $12,000

CommunityFoundation of Grant County, Indiana, Inc.

Did you know...

There are a number of ways you can give to the Community Foundation. You've made a lifetime of memories in Grant County—you obviously love where you live. Make sure the next generation loves it, too. Here are a few of our favorite options

Cash/Online	Stocks/Bonds	Percentage Beneficiary
It's easy to make a donation like this; plus, you get an income tax charitable deduction for the full amount of the gift. Drop by the office with cash or mail a check with your specified fund name written in the memo line. Or choose a fund you would like to support and donate online with your credit/debit card at: **GiveToGrant.org/Marketplace.**	With the Dow soaring as of late, highly appreciate securities may make a better donation than cash. Donating securities directly to charity allows you to deduct the full fair market value, thus avoiding capital gains tax on the appreciation. You'll receive an income tax charitable deduction for the full fair market value of the gift transferred to the Foundation.	Any time you have the opportunity to name a beneficiary (through life insurance, wills, estate plans...) you can name the Community Foundation of Grant County. For example, is your spouse the 100% beneficiary of your retirement fund? Perhaps that can be changed to 95% with 5% allocated to the Foundation.

505 West Third Street, Marion, Indiana 46952 • 765-662-0065 • www.GiveToGrant.org • SayHello@GiveToGrant.org

Step #6: Ask

Create material people want to open and read!

Mirror, mirror

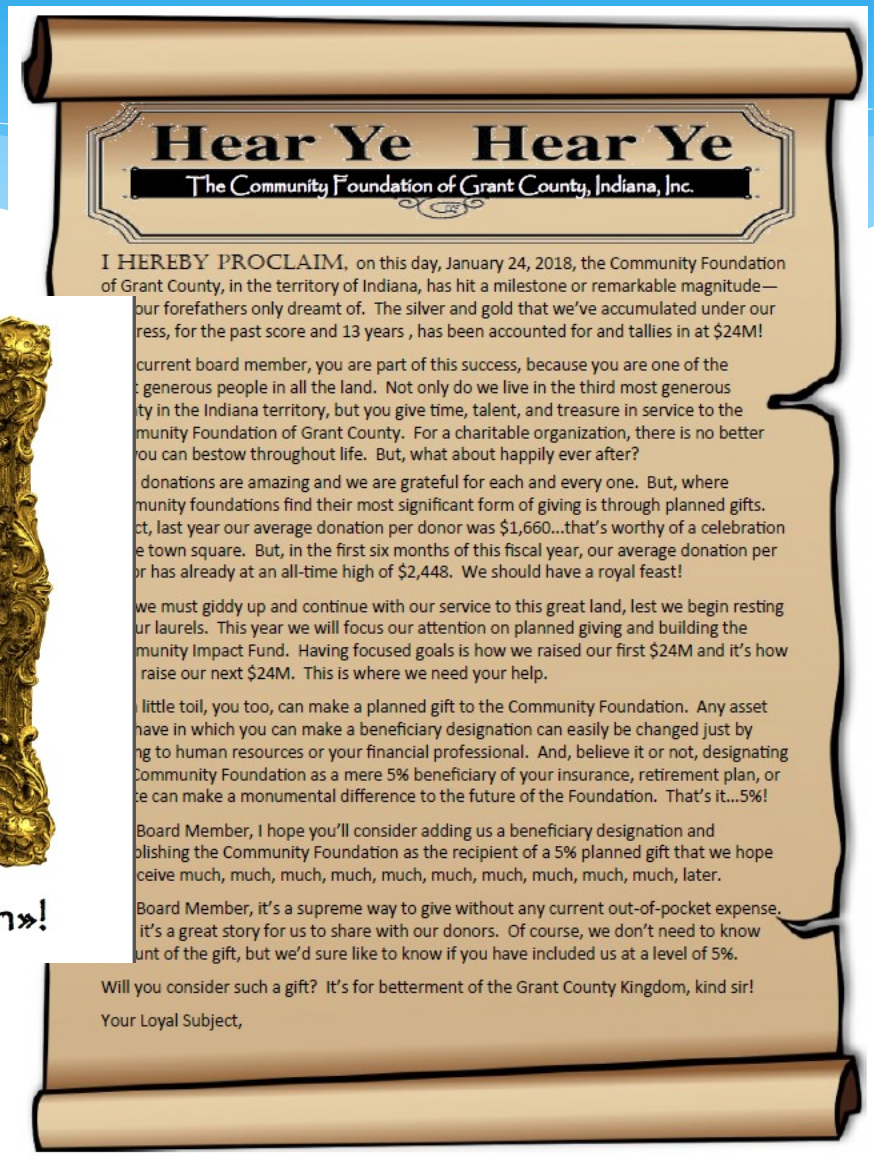
on the wall

who's the

Most Generous

of them all?

It's you, «Salutation»!



Hear Ye Hear Ye

The Community Foundation of Grant County, Indiana, Inc.

I HEREBY PROCLAIM, on this day, January 24, 2018, the Community Foundation of Grant County, in the territory of Indiana, has hit a milestone or remarkable magnitude— our forefathers only dreamt of. The silver and gold that we've accumulated under our ress, for the past score and 13 years , has been accounted for and tallies in at $24M!

current board member, you are part of this success, because you are one of the generous people in all the land. Not only do we live in the third most generous ty in the Indiana territory, but you give time, talent, and treasure in service to the munity Foundation of Grant County. For a charitable organization, there is no better ou can bestow throughout life. But, what about happily ever after?

donations are amazing and we are grateful for each and every one. But, where munity foundations find their most significant form of giving is through planned gifts. ct, last year our average donation per donor was $1,660...that's worthy of a celebration e town square. But, in the first six months of this fiscal year, our average donation per r has already at an all-time high of $2,448. We should have a royal feast!

we must giddy up and continue with our service to this great land, lest we begin resting ur laurels. This year we will focus our attention on planned giving and building the munity Impact Fund. Having focused goals is how we raised our first $24M and it's how raise our next $24M. This is where we need your help.

little toil, you too, can make a planned gift to the Community Foundation. Any asset have in which you can make a beneficiary designation can easily be changed just by ng to human resources or your financial professional. And, believe it or not, designating Community Foundation as a mere 5% beneficiary of your insurance, retirement plan, or e can make a monumental difference to the future of the Foundation. That's it...5%!

Board Member, I hope you'll consider adding us a beneficiary designation and blishing the Community Foundation as the recipient of a 5% planned gift that we hope ceive much, much, much, much, much, much, much, much, much, much, later.

Board Member, it's a supreme way to give without any current out-of-pocket expense. it's a great story for us to share with our donors. Of course, we don't need to know unt of the gift, but we'd sure like to know if you have included us at a level of 5%.

Will you consider such a gift? It's for betterment of the Grant County Kingdom, kind sir!

Your Loyal Subject,

Step #6: Ask

Create material people want to open and read!

The Good and the Bad

A Good Statement…	A Bad Statement…
Uses language your constituents use.	Uses jargon, doesn't understand your audience.
Is emotionally stirring.	Is logical and cold.
Communicates the "why."	Communicates only the "what" or "how."
Is concise.	Is really long.
Is a single, powerful sentence.	Is a rambling paragraph.
Sounds good spoken out loud.	Is full of clauses and hard to say.
Is memorable.	Is forgettable.
Surprises.	Is dull.
Is actionable.	Can't be quantified.
Is specific.	Is vague.

Creativity is Intelligence Having Fun!

- Don’t send bills!
- Thank Before You Bank
- You Can Do Better Than a Receipt
- Use Mail Merge
- What’s the best thing you’re currently doing?
- How can they give again?
- Demonstrate that you and your team are donors

Step #6: Thank

Create material people want to open and read!

CommunityFoundation
of Grant County, Indiana, Inc.

August 22, 2017

«Name»
«Organization»
«Address1»
«Address2»
«CityStZip»

Dear «Salutation»,

Believe it or not, Thanksgiving is just around the corner. During the Holiday Season more than ever, our thoughts turn gratefully to those who have made our progress possible. We are specifically thankful for your donation of «GiftAmount» to the «Fund» here at the Community Foundation.

You can make your next donation even more special by giving in honor or in memory of a loved one. We will inform the recipient of this special honor or the loved one's family of the memorial donation. Those names are added to the Grant County Giving Tree and will help to create a lasting legacy for the future of Grant County.

Thankfully,

Dawn Brown, Executive Director and Donor
Sherri Rush, Chief Financial Officer and Donor
Shelly Jones, Development Manager and Donor
Cassie Fleming, Grants Manager and Donor
Meagan McCracken, Office Coordinator and Donor

The Community Foundation of Grant County, Indiana, Inc. is a 501(c)(3) nonprofit organization and acknowledges that no goods or services were provided to you in return for your contribution. This letter is your receipt and should be kept with your tax records. According to IRS requirements, your contribution upon receipt becomes the property of the Foundation.

505 West Third Street | Marion, IN 46952 | 765-662-0065 | www.GiveToGrant.org

- ✓ 8 1/2 X 11
- ✓ Folded in Half
- ✓ Looks like a card, not a bill

Step #6: Thank

Create material people want to open and read!

«Name»
«Organization»
«Address1»
«Address2»
«CityStZip»

«Fund» here at the Community Foundation.

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more special by giving

Dawn Brown
Executive Director and Donor

Sherri Rush
Chief Financial Officer and Donor

Shelly Jones
Development Manager and Donor

Cassie Fleming
Grants Manager and Donor

Meagan McCracken
Office Coordinator and Donor

The Community Foundation of Grant County, Indiana, Inc. is a 501(c)(3) nonprofit organization and acknowledges that no goods or services were provided to you in return for your contribution. This letter is your receipt and should be kept with your tax records. According to IRS requirements, your contribution upon receipt becomes the property of the Foundation.

505 West Third Street | Marion, IN 46952 | 765-662-0065 | www.GiveToGrant.org

CommunityFoundation of Grant County, Indiana, Inc.

August 22, 2017

«Name»
«Organization»
«Address1»
«Address2»
«CityStZip»

Dear «Salutation»,

Believe it or not, Thanksgiving is just around the corner. During the Holiday Season more than ever, our thoughts turn gratefully to those who have made our progress possible. We are specifically thankful for your donation of «GiftAmount» to the «Fund» here at the Community Foundation.

You can make your next donation even more special by giving in honor or in memory of a loved one. We will inform the recipient of this special honor or the loved one's family of the memorial donation. Those names are added to the Grant County Giving Tree and will help to create a lasting legacy for the future of Grant County.

Thankfully,

Dawn Brown
Executive Director and Donor

Sherri Rush
Chief Financial Officer and Donor

Shelly Jones
Development Manager and Donor

Cassie Fleming
Grants Manager and Donor

Meagan McCracken
Office Coordinator and Donor

County, Indiana, Inc. is a 501(c)(3) nonprofit organization and acknowledges that no goods or services were provided urn for your contribution. This letter is your receipt and should be kept with your tax records. to IRS requirements, your contribution upon receipt becomes the property of the Foundation.

Street | Marion, IN 46952 | 765-662-0065 | www.GiveToGrant.org

Step #6: Thank

Create material people want to open and read!

CommunityFoundation

April 11, 2017

«Name»
«Organization»
«Address1»
«Address2»
«CityStZip»

Dear «Salutation»,

Throughout most comic books, and movies, superheroes express a selfless attitude. Putting others' needs before their own, they charge into the unknown with valiant bravery. As Thanksgiving Day approaches, we want to express our thankfulness to our hometown superhero—YOU!

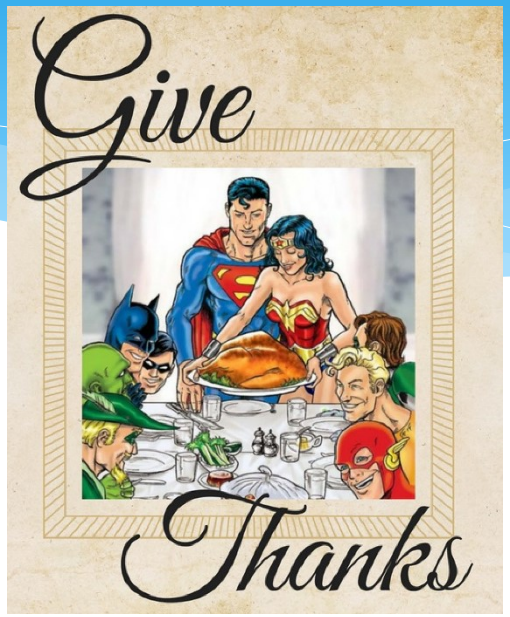
You exhibited proof that you were a superhero by giving generously to «Fund». You gave **«GiftAmount»** to the **«Fund»** on **«GiftDate»** at the Community Foundation and we can't thank you enough!

Next time you donate, consider dedicating your dona
memory of someone special. Donating a tribute for s
occasion is happy or sad is a way to capture a mome
memory lives on forever. Tributes like this make it p
mission of the Community Foundation which is conn
with causes that matter.

Gratefully,

Dawn Brown	**Sherri Rush**	**Shelly Jones**	**Cassie Fk**
Executive Director and Donor	Chief Financial Officer and Donor	Development Manager and Donor	Grant Manag and Do

The Community Foundation of Grant County, Indiana, Inc. is a 501(c)(3) nonprofit
goods or services were provided to you in return for your contribution.
should be kept with your tax records. According to IRS requirements, yo
becomes the property of the Foundation.



Dear «Salutation»,

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You exhibited proof that you were a superhero by giving generously to «Fund». You gave **«GiftAmount»** to the **«Fund»** on **«GiftDate»** at the Community Foundation and we can't thank you enough!

Step #6: Thank

Create material people want to open and read!

Provide this Sample Bequest Language to your attorney when planning to make a gift to The Community Foundation by including us in your will or estate plans. Call us at 765-662-0065 with any questions about how to leave a lasting legacy in Grant County.

Sample Bequest Language:

I give to The Community Foundation of Grant County, Indiana, Inc., an not-for-profit corporation organized under the laws of the state of Indiana and located in Marion, Indiana, _____ percent (_____%) of my estate OR the sum of $_____ OR all my right, title, and interest in the following described property: _____ OR all rest, residue, and remainder of my estate to be used for the following purposes:_____

Important Details:

Legal Name: The Community Foundation of Grant County, Indiana, Inc.
Tax Identification Number: 31-111-7791
The Community Foundation is an IRS nonprofit corporation

CommunityFoundation

Made for you by the creative minds of the Community Foundation of Grant County staff, and printed in-house for 6.5¢.

505 West Third Street | Marion, Indiana 46952 | 765-662-0065 | www.GiveToGrant.org

CommunityFoundation

March 3, 2018

«Name»
«Organization»
«Address1»
«Address2»
«CityStZip»

Dear «Salutation»,

Who doesn't love S'Mores? Enjoying a warm and gooey treat around the fire with your loved ones is pretty fantastic! That feeling of connection with your closest friends and family can't be beat. It's kind of like how we feel about you! Your generosity makes what we do at the Community Foundation possible.

So, thank you for your donation of «GiftAmount» to the «Fund» on «GiftDate» at the Community Foundation. The world needs S'More people like you! (see what we did there?)

Did you know that you can also make a gift to The Community Foundation by including us in your will or estate plan? Sample Bequest Language that you can provide to your attorney is included on the back of this card. The value of your bequest will not be subject to estate taxes since we are recognized as a non-profit charity. This type of planned giving can benefit any fund held at the Foundation so that the charitable cause or organization you love most has a sustainable income stream forever. Other planned giving options include making gifts with stock, retirement plans, life insurance, and more. Call us at 765-662-0065 with any questions about how to leave a lasting legacy in Grant County.

Gratefully,

Dawn Brown, Executive Director and Donor
Sherri Rush, Chief Financial Officer and Donor
Shelly Jones, Development Manager and Donor
Cassie Fleming, Grants Manager and Donor
Meagan McCracken, Office Coordinator and Donor

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Fun Facts:

1. National S'Mores Day is August 10th.
2. The first recorded S'Mores recipe is from 1927 in the publication "Tramping and Trailing with Girl Scouts."
3. Without your donation, the «Fund» couldn't fulfill its purpose which is <<purpose>>

Step #6: Thank

Create material people want to open and read!

An Indiana landscape on 3/3/18

March 3, 2018

«Name»
«Organization»
«Address1»
«Address2»
«CityStZip»

Dear «Salutation»,

We Hoosiers are used to experiencing all four seasons in one week (or day!). But when the snow is piling, and the wind is blustering, our hearts are warm because of you. Indiana weather may change just about every ten minutes, but your generosity doesn't!

Thank you for your donation of **«GiftAmount»** on **«GiftDate»** to the **«Fund»** at the Community Foundation. Without your generosity, the «Fund» couldn't fulfil its purpose which is <<purpose>>. You are what makes Grant County a great county.

Did you know that you can also make a gift to The Community Foundation by including us in your will or estate plan? Sample Bequest Language that you can provide to your attorney is included on the back of this card. The value of your bequest will not be subject to estate taxes since we are recognized as a non-profit charity. This type of planned giving can benefit any fund held at the Foundation so that the charitable cause or organization you love most has a sustainable income stream forever. Other planned giving options include making gifts with stock, retirement plans, life insurance, and more. Call us at 765-662-0065 with any

CommunityFoundation
505 West Third Street Marion, IN 46952

«Name»
«Organization»
«Address1»
«Address2»
«CityStZip»

ken

Step #6: Thank

Create material people want to open and read!

HERE ARE SOME REASONS WHY OUR BOARD MEMBERS LOVE GRANT COUNTY

"I love the relationships of a smaller community. I also love that I can make a real difference in the community. Grant County has been a wonderful place professionally and for raising a family. I love to travel, but I also love that my roots are strong and deep in Grant County."

-Chad Leighty

"I love the people of Grant County. Being a part of a small community brings the benefit of getting to know your neighbors and virtually everywhere you go, you'll see a friend. Nothing can be better than that."

-Valerie McHarry

"I love the rural countryside. People who don't know you still wave anyway. I also love that the history of Grant County tells an amazing story of settlement, ingenuity, and perseverance."

-John Jones

CommunityFoundation

March 3, 2018

«Name»
«Organization»
«Address1»
«Address2»
«CityStZip»

Dear «Salutation»,

It says in the book *Love Where You Live: Creating Emotionally Engaging Places* by Peter Kageyama "Do not mistake small for unimportant. In our personal lives, it is often the small things, the tiny acts of love or neglect, which make or break relationships. Our radar is attuned to the big things in our cities and our relationships. We need to re-calibrate that radar to see how important small, hyper-local and fun interventions are to the health and progress of our communities."

You may not realize, but your donation on **«GiftDate»** of **«GiftAmount»** to the **«Fund»** has already
community. It helps

Did you know that
including us in your
provide to your atto
bequest will not be
charity. This type o
that the charitable c
stream forever. Oth
retirement plans, lif
questions about hov

Thanks for giving u

Dawn Brown **She**
President/CEO
and Donor and

The Community Foundation of Grant County, Indiana, Inc. is a 501(c)(3) nonprofit organization and acknowledges that no goods or services were provided to you in return for your contribution. This letter is your receipt and should be kept with your tax records. According to IRS requirements, your contribution upon receipt becomes the property of the Foundation.

CommunityFoundation
of Grant County, Indiana, Inc.
505 West Third Street Marion, IN 46952

«Name»
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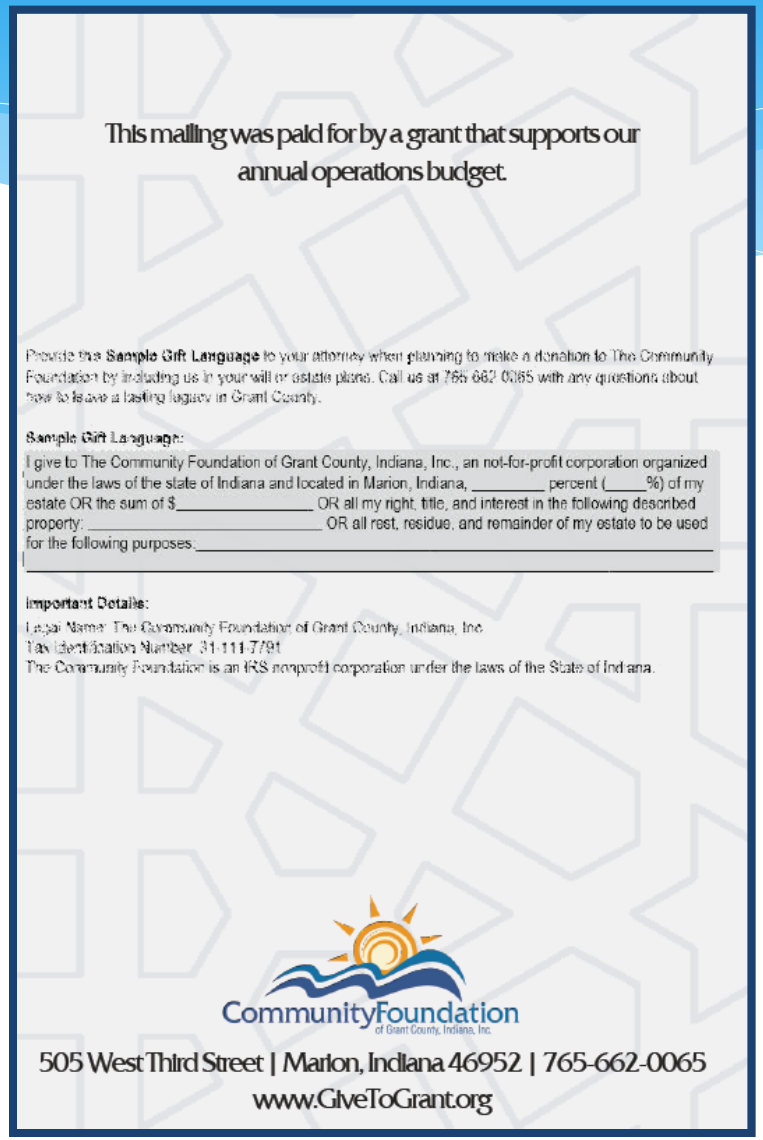
Step #6: Thank

Create material people want to open and read!



This mailing was paid for by a grant that supports our annual operations budget.

Provide the **Sample Gift Language** to your attorney when planning to make a donation to The Community Foundation by including us in your will or estate plans. Call us at 765-662-0065 with any questions about how to leave a lasting legacy in Grant County.

Sample Gift Language:

I give to The Community Foundation of Grant County, Indiana, Inc., an not-for-profit corporation organized under the laws of the state of Indiana and located in Marion, Indiana, _____ percent (____%) of my estate OR the sum of $_____ OR all my right, title, and interest in the following described property: _____ OR all rest, residue, and remainder of my estate to be used for the following purposes:_____

Important Details:

Legal Name: The Community Foundation of Grant County, Indiana, Inc.
Tax Identification Number: 31-1117791
The Community Foundation is an IRS nonprofit corporation under the laws of the State of Indiana.

CommunityFoundation
of Grant County, Indiana, Inc.

505 West Third Street | Marion, Indiana 46952 | 765-662-0065
www.GiveToGrant.org

Step #6: Thank

Create material people want to open and read!

Check out our 2016-17 Annual Report on our website or stop by our office to pick one up, and see why We Love Where We Live!

Communityfoundation

January 24, 2018

«Name»
«Organization»
«Address1»
«Address2»
«CityStZip»

Dear «Salutation»,

Have you tried all 100 shake and sundae concoctions from Ivanhoe's Drive-In located in Upland? What about taking a drive through the Walkway of Lights in Marion's Matter Park? I bet you've attended the James Dean Festival "where cool was born" in Fairmount, Indiana. No matter the time of year, there's always something happening in Grant County that makes us Love Where We Live. How could you not love a community where the citizens are so generous?

Your generosity, and the generosity of thousands of others like you, is another reason why we Love Where We Live! So, here's a hearty Hoosier thank you for your gift on **«GiftDate»** of **«GiftAmount»** to the **«Fund»** held at the Community Foundation of Grant County!

But wait, there's more! Did you know that you can also make a gift to the Community Foundation by including us in your will or estate plan? Sample gift language that you can provide to your attorney is included on the back of this card. The value of your gift will not be subject to estate taxes since we are recognized as a non-profit charity. This type of planned giving can benefit any fund held at the Foundation, so that the charitable cause or organization you love most has a sustainable income stream forever. Other planned giving options include making gifts with stock, retirement plans, life insurance, and more. Call us at 765-662-0065 with any questions about how to leave a lasting legacy in Grant County.

Thanks for giving us another reason to **Love Where We Live**,

Dawn Brown	Sherri Rush	Shelly Jones	Cassie Fleming	Meagan McCracken
Executive Director and Donor	Chief Financial Officer and Donor	Development Manager and Donor	Grants Manager and Donor	Office Coordinator and Donor

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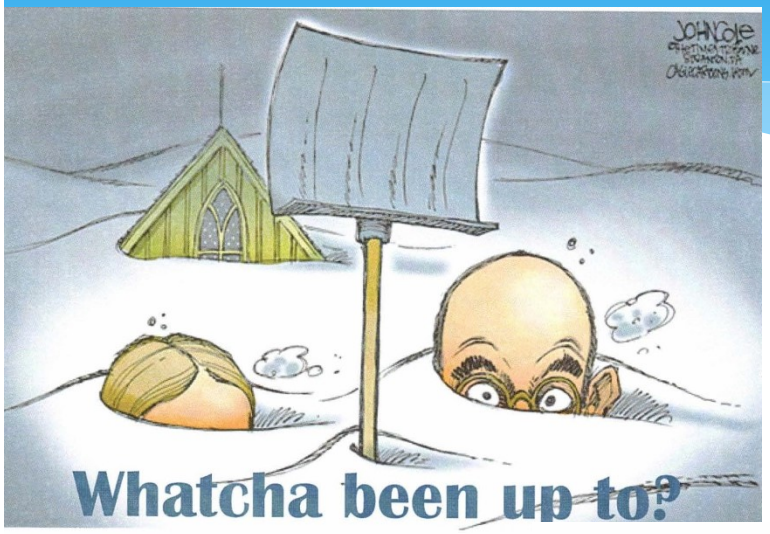


- ✓ **Targeting top donors from past 3 years = Donor #1: $30,000 in donations in 1 year PLUS invite to speak to his association; Donor #2: Also generated first stock gift of $150,000 and $50,000 cash gift in same fiscal year.**

Dear Addessa,

Wintry mix. If you hear your weatherman say those two words, beware. It's never, ever a good sign. It's a sure sign that you'll be hibernating inside while the temperature outside looks more like a golf score than a basketball score....unless they're wrong, of course.

But, all is not lost. Indiana's official mascot isn't a sled just yet. There are still plenty of teenagers who need to shovel a few more driveways to save for dates, gasoline, and college. (Probably in that order.) Plus, we still have some Netflix binge watching to do that I can only be rationalized if it's below freezing. See, there's a bright side to everything...especially with the glare of 3 feet of snow.

That's why we're not looking ahead at that ugly weather forecast to learn if we'll soon have snow up to our eyeballs. (See the Midwest version of American Gothic on the front of this card.) Instead we decided to look back...and guess what we found? YOU. That's right. In the past few years you have been one of our most loyal donors.

Similar to the *Postman's Creed*, neither snow nor rain nor heat nor gloom of night can keep you from being generous. That's why you're the proud recipient of this silly, homemade card. We just hadn't thanked you in a while and, frankly, on this cold winter's day in Indiana, we couldn't think of anything else we'd rather do.

Thanks, Peace, and Blessings from your Community Foundation Team,

Step #6: Thank

Create material people want to open and read!

February 2014

Dear Jack and Norma:

It's February, the month of the year where we think of some of the greatest couples in history: Hepburn and Tracy, Lucy and Ricky, Cliff and Claire, Kermit and Miss Piggy...you and the Community Foundation.

As a small token of our gratitude for your past contributions to the Foundation, we made a local Girl Scout very happy and bought you this box of cookies. But wait, there's more! Invite some friends over and try these cork and cookie wine pairings out for yourself. If wine isn't your thing, no problem. You can't go wrong with that classic combo, good, old-fashioned milk and cookies!

Enjoy!

Dawn, Sherri, Ashley, and Deb

Your Community Foundation Team

COOKIE	1ST CHOICE	2ND CHOICE
DO-SI-DOS®	CHARDONNAY	DOLCETTO
SAMOAS®	SAUVIGNON BLANC	CHARDONNAY
SAVANNAH SMILES®	SPARKLING	DOLCETTO
TAGALONGS®	CHARDONNAY	PRISM
THIN MINTS®	DOLCETTO	SPARKLING
TREFOILS®	PINOT NOIR	SPARKLING

"Vivid, memorable interactions are what people remember. Surprises and vivid action matter far more than we imagine, and we regularly underinvest in them". ~ Seth Godin

Step #6: Thank

Create material people want to open and read!

I scream.
You scream.
The neighbors call.
It's awkward.

But don't let that stop you becaus
scream for ice cream! We hope this $
to Ivanhoe's has you ready to scre
excitement. It's our way of saying than
being a Community Foundation sc
reviewer this year.

This fall, over 150 students will
Community Foundation scholarships t
their higher education dreams. And that simply
would not be possible without you.

Thanks, blessings, and ice cream,

The Community Foundation Team

CommunityFoundation
of Grant County, Indiana, Inc.
505 West Third Street Marion, IN 46952

Memorial Day Apple Chicken Salad from the Kitchen of Dawn Brown

Yield: about 6 servings

Ingredients:

3 cups chopped rotisserie chicken (it's quicker) or cooked chicken breast
2 celery stalks, chopped
1 1/2 apples, chopped (Choose the type you like best; I love Granny Smith.)
1 cup sliced grapes, optional, but I think it makes it taste so fresh
3/4 cup smoked/salted almonds (I bake them on 350 until just brown… brings out the awesome flavor); slightly crush them after they cool.
3 Tablespoons Cool Whip (Yes, seriously, it's the secret ingredient!)
3 Tablespoons mayonnaise – Not Miracle Whip
1 1/2 teaspoons
1/2 teaspoon on
3/4 teaspoon co
freshly ground p

Instructions:

1. Place chicken, celery, apple, grapes, and almonds in a large bowl.
2. In a small bowl, combine Cool Whip, mayonnaise, allspice, onion powder, salt, and pepper.
3. Pour Cool Whip and mayonnaise mixture into chicken mixture.
4. Stir in some love with your Community Foundation wooden spoon.
5. Serve immediately at room temperature or chilled. (I like it chilled.)

Dear «Salutation»:

When I think of the perfect recipe for an amazing Memorial Day, I think of a lovely picnic, soaking up some sun, playing outdoor games, and laughing with friends and family.

Now that our youngest son, Dalton, has enlisted in the United States Army, I'm sure that Memorial Day will have an even deeper meaning to our family. At the tender age of 17, we're sending him off to fight for the freedoms that Americans enjoy every day of our lives. We're proud of him for many reasons, but especially for doing what he can to make this world a better place.

As a loyal donor to the Community Foundation, you do that same thing. Your generosity makes Grant County a better place to live, work, play, pray…and yes, eat. Although it's impossible to ever thank you enough, we hope you'll accept this small token of our appreciation to help you 'whip up' some Memorial Day Apple Chicken Salad. It's a Brown Family favorite!

We also hope you'll consider giving to the Community Foundation of Grant County again. There's no doubt when it comes to the recipe for generosity, our donors are the key ingredient!

Enjoy!

CommunityFoundation

P.S. A special thanks to Computer Age Engineering for donating their pyrography services to engrave your wooden spoon.

Step #6: Thank

Create material people want to open and read!

...ONE GIANT LEAP FOR LITTLE GIANTS!

It is with sincere gratitude that we say, MISSION ACCOMPLISHED!

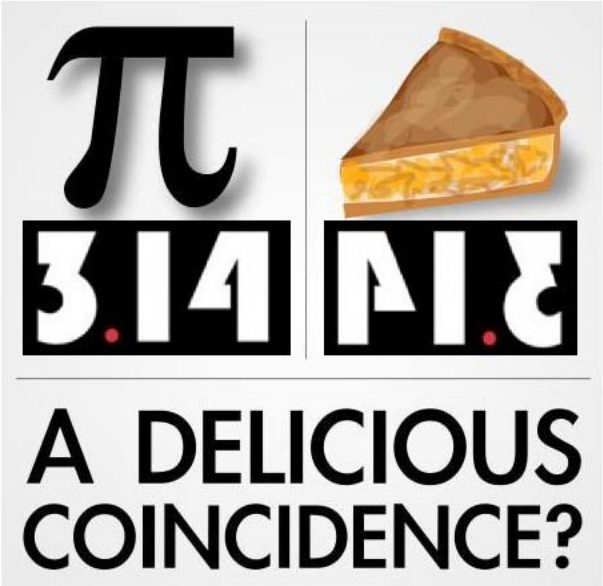
DAWN BROWN
Executive Director
Community Foundation of Grant County

KERRI WORTINGER
Preschool Director
Marion Community Schools

Thank you to 43 donors who donated $619,000 in 4 weeks (Dec. 15-Jan. 15) in order to secure a $500,000 state matching grant… which we got!

Step #6: Thank

Create material people want to open and read!



«Name»

«Address1»

«Address2»

Dear «Salutation»:

It's the year 2015; therefore, **March 14, 2015 at 9:26:53** has epic significance.

Math geeks and donors unite and get excited because this exact date and time represents a once in a lifetime event…the first 10 digits of π (Pi): **3.141592653**.

Mathematically Pi is the ratio of a circle's circumference to its diameter. Does knowing that make us sound seriously smart or notably nerdy? Wait, don't answer that!

A better question might be, "*Who is super generous and going to eat an Indiana Sugar Cream Wicks Pie on National Pi Day?*" You, of course!

This is just our little way to surprise you with gratitude for the generosity you showed in starting a new fund with the Community Foundation : **«Fund_Name»**

If others would be just as generous or consider giving **3.141592653%** of their annual income or estate to the Community Foundation, Grant County would be a better place to work, live, play, and pray.

Step #6: Thank

Create material people want to open and read!

GREATEST DUOS OF ALL-TIME...

CommunityFoundation
of Grant County, Indiana, Inc.

✓ Led directly to $5,000 donation.

~ Kermit and Miss Piggy ~

~ Q and u ~

~ Shoes and Socks ~

~ Cheese and Crackers ~

~ You and the Community Foundation ~

WE KNOW A GOOD COMBINATION WHEN WE SEE ONE...

AND WE SIMPLY COULDN'T DO IT WITHOUT YOU.

Even though we're a little cheesy sometimes,
we do want to sincerely thank you for giving your
time, talent, and treasure to volunteer on
the Board of Directors
of the
Community Foundation of Grant County.

Hoping your holidays are filled with food, fun, and family,

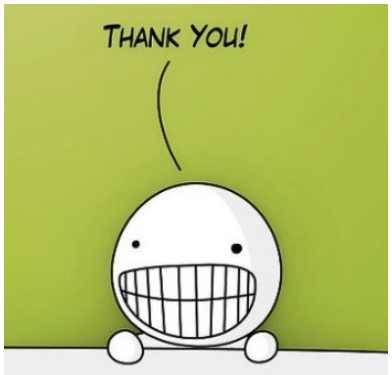
Dawn, Sherri, Ashley, Shelly, Erin, Jess, & Tyler

Step #6: Thank

Create material people want to open and read!

Thank You Letter Rubric

- Address
- Date
- Salutation that's not stuffy
- Powerful quotation/statement for lead paragraph
- Express appreciation
- Describe the gift
- Thanks again for…
- Close that isn't generic
- Signatures, does it have to be 1 person?
- Tax Language, if applicable
- Be warm and personal
- Make it about the donor
- Tell what donation did
- Conversational tone
- Make the donor feel great
- Mention a connection
- Mention the past, allude to the future

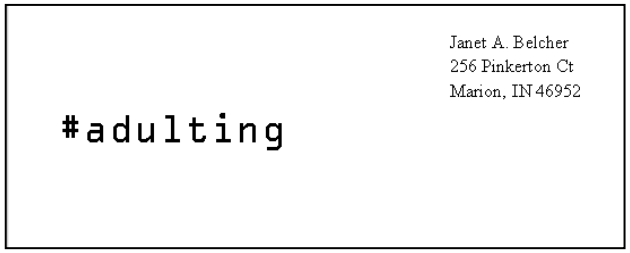


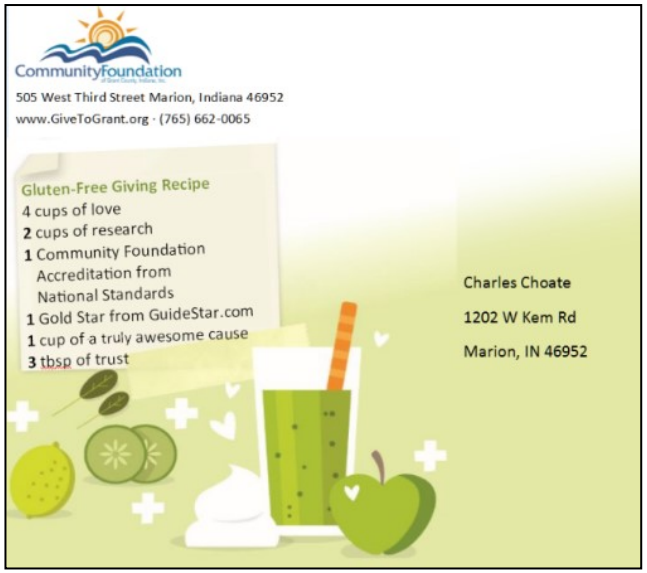
Step #6: Thank

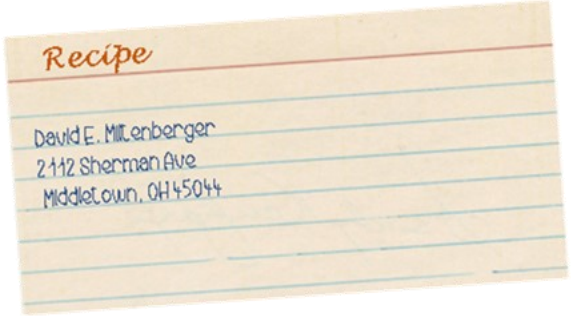
Create material people want to open and read!

Mailing Rubric

- Formal or Informal Salutation?
- What size envelope? Does it look like a bill?
- Card or letter?
- Make outside of envelope appealing
- You may tell them how much it costs to create the piece – 6 ½ cents!
- Tailor to the audience – no more than 50







Creativity is Intelligence Having Fun!

- Tell stories about your cause
- Focus on positive outcomes
- Make stories simple, rather than complex
- Use consistent messaging
- Answer the "So What?" question
- Start with your internal audience and build upon that
- Be creative, strategic and most importantly… HAVE FUN!

*Kelly Young, Baise Communications

Step #6: Report

Create material people want to open and read!

TOTAL GIVING 2013

COMMUNITY FOUNDATION OF GRANT COUNTY, INDIANA INC.

CommunityFoundation

TAX INFORMATION ENCLOSED

KIRT AND MAUREEN GILLUM
91 GOWING RD ~
HUDSON, NH 03051

HAPPY VALENTINE'S

505 WEST THIRD
WWW.GIVETOGR

KIRT AND MAUREEN...
A YEAR OF HEARTFELT GENEROSITY

921
FOUNDATION DONATIONS THIS YEAR

YEARS IN GRANT COUNTY:
30
& LOVING
EVERY MINUTE OF IT

WE'RE GRATEFUL FOR YOU BECAUSE:

YOU DONATED TO A WORTHY CAUSE.

YOUR DONATION BENEFITS GRANT COUNTY, INDIANA!

YOU COULD GIVE ANYWHERE, BUT YOU GAVE THROUGH THE COMMUNITY FOUNDATION.

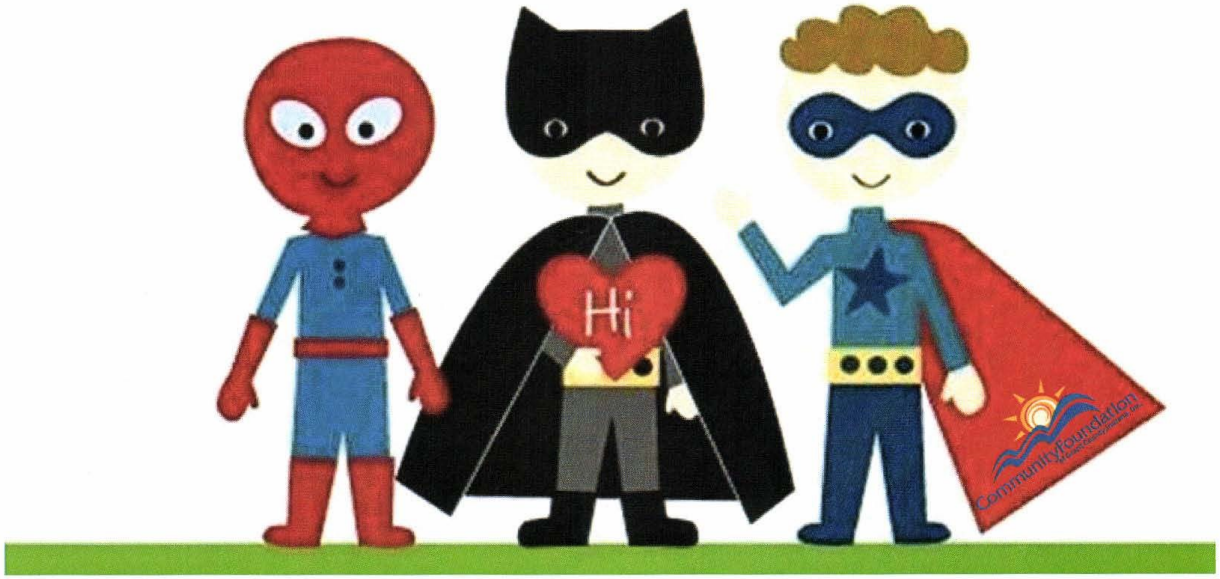
THANKS, PEACE, AND LOVE,

DAWN, SHERRI, ASHLEY, & DEB...YOUR COMMUNITY FOUNDATION TEAM

Step #6: Report

Create material people want to open and read!

YOU'RE A SUPER DONOR!



NTINE'S DAY!

CommunityFoundation
of Grant County, Indiana, Inc.

rheroes throughout the year, so we've compiled all of your 2015 giving to the Community Foundation into one ***BIG*** number to help with tax preparations.

Your donations to the Community Foundation of Grant County in 2015 totaled: $< >.

ORDINARY PEOPLE DOING EXTRAORDINARY THINGS...PROOF THAT NOT ALL SUPERHEROES WEAR CAPES.

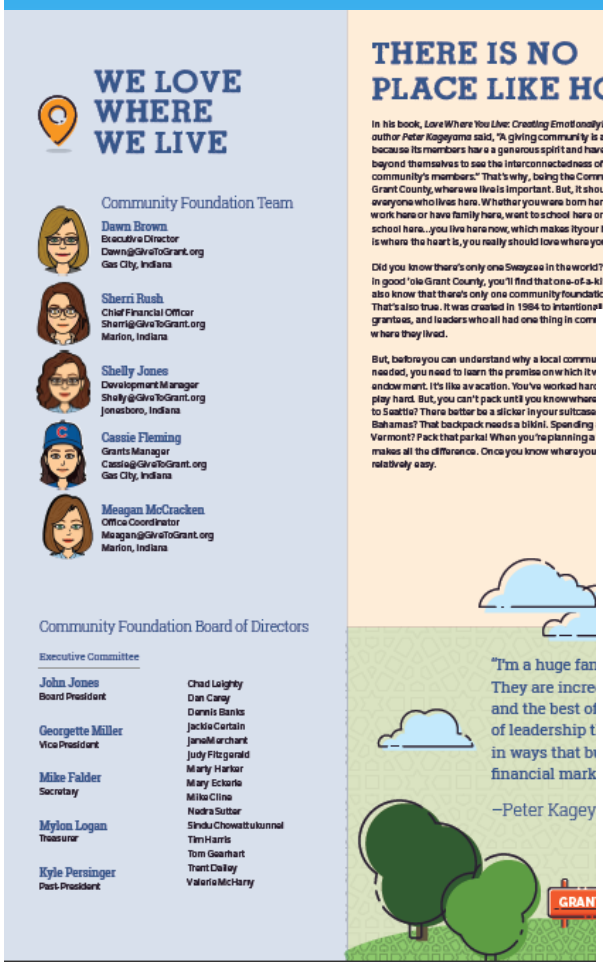
Thanks for your generosity, we hope to be a part of your charitable giving plans in 2016 and beyond.

UNTIL NEXT TIME... ***DAWN, SHERRI, SHELLY, CASSIE, AND MEAGAN***

And remember, all donations made to the Community Impact Fund before March 31, 2016 will be doubled.

Step #6: Report

Create material people want to open and read!



WE LOVE WHERE WE LIVE

Community Foundation Team

Dawn Brown
Executive Director
Dawn@GiveToGrant.org
Gas City, Indiana

Sherri Rush
Chief Financial Officer
Sherri@GiveToGrant.org
Marion, Indiana

Shelly Jones
Development Manager
Shelly@GiveToGrant.org
Jonesboro, Indiana

Cassie Fleming
Grants Manager
Cassie@GiveToGrant.org
Gas City, Indiana

Meagan McCracken
Office Coordinator
Meagan@GiveToGrant.org
Marion, Indiana

Community Foundation Board of Directors

Executive Committee

John Jones
Board President

Georgette Miller
Vice President

Mike Falder
Secretary

Mylon Logan
Treasurer

Kyle Persinger
Past-President

Chad Leighty
Dan Carey
Dennis Banks
Jackie Certain
Jana Merchant
Judy Fitzgerald
Marty Harker
Mary Eckerle
Mike Cline
Nadra Sutter
Sindu Chowattukunnel
Tim Harris
Tom Gearhart
Trent Dailey
Valerie McHarry

THERE IS NO PLACE LIKE HOME

In his book, *Love Where You Live: Creating Emotionally Engaging Places*, author Peter Kageyama said, "A giving community is a lovable community because its members have a generous spirit and have learned to look beyond themselves to see the interconnectedness of all of the community's members." That's why, being the Community Foundation of Grant County, where we live is important. But, it should be meaningful to everyone who lives here. Whether you were born here or moved here, work here or have family here, went to school here or take your kids to school here...you live here now, which makes it your home. And, if home is where the heart is, you really should love where you live. We do!

Did you know there's only one Swayzee in the world? It's true. Right here in good 'ole Grant County, you'll find that one-of-a-kind town. Did you also know that there's only one community foundation in Grant County? That's also true. It was created in 1984 to intentionally serve local donors, grantees, and leaders who all had one thing in com where they lived.

But, before you can understand why a local commu needed, you need to learn the premise on which it w endowment. It's like a vacation. You've worked har play hard. But, you can't pack until you know where to Seattle? There better be a sticker in your suitcase Bahamas? That backpack needs a bikini. Spending Vermont? Pack that parka! When you're planning a makes all the difference. Once you know where you relatively easy.

Being charitable works the same way. If you know your charitable end goal, then you'll know if donating to an endowment will be the right vehicle to help get you there. Let's break it down to better explain the concept:

EN means "to cause".

DOW means "to thrive".

MENT means "the result of an action".

So, making an endowed donation to the Community Foundation means you truly want to cause something to thrive! That definition puts the pin right on the map, doesn't it? But, how do you do that? Does one donation work? Two? Can it be a small donation? Do I have to be wealthy? This is where the Community Foundation can help! Endowed gifts cause organizations to thrive because they provide an income stream that helps sustain the work they're doing annually. That's possible because we

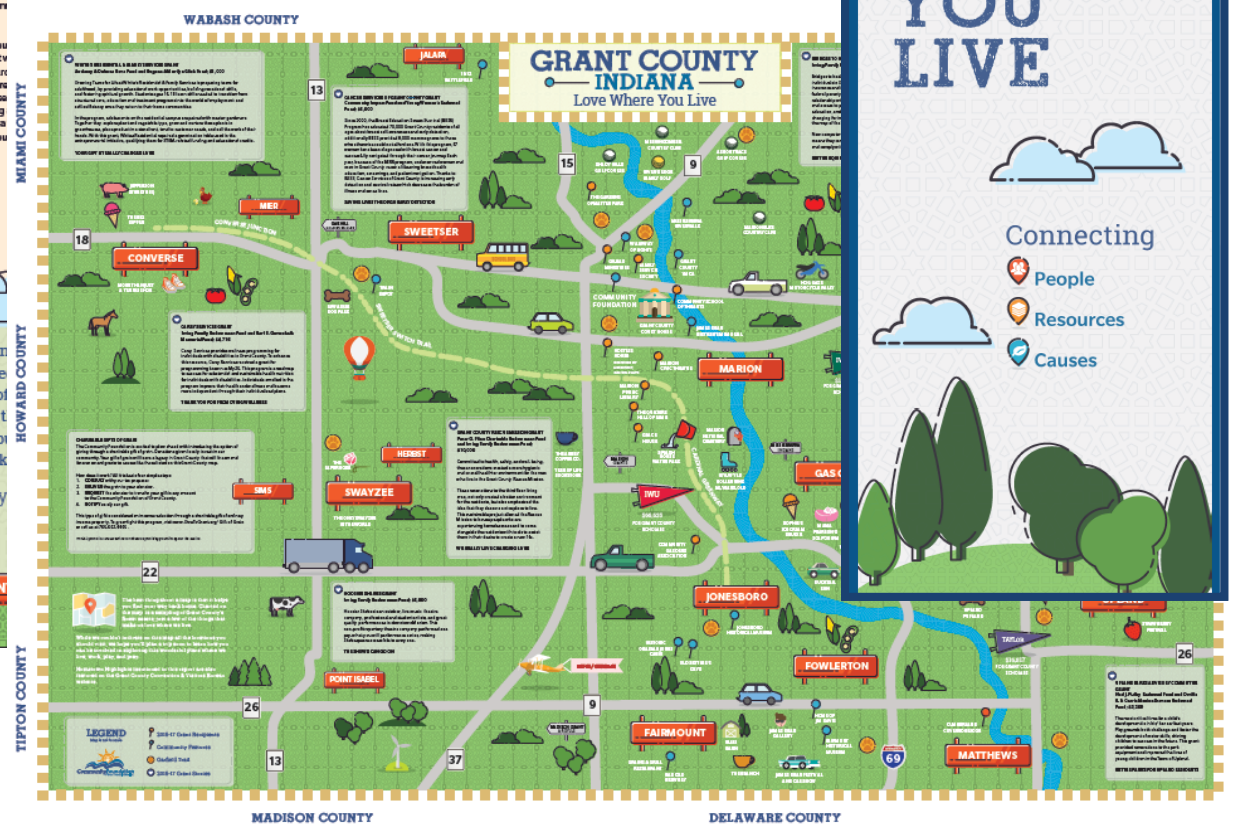
"I'm a huge fan
They are incre
and the best o
of leadership t
in ways that b
financial mark

–Peter Kagey

PRESIDENT'S MESSAGE

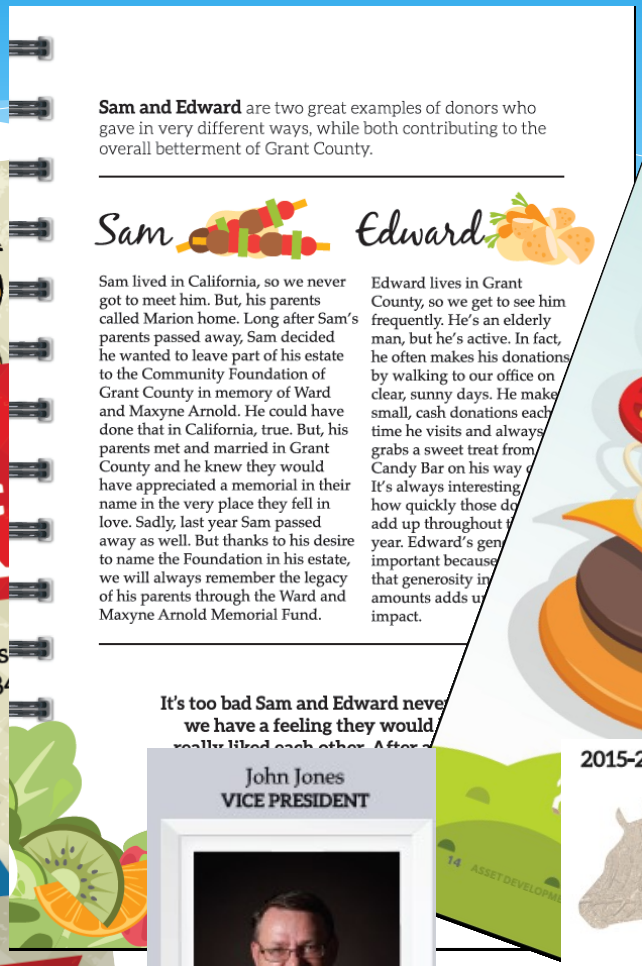
Dear Friends,

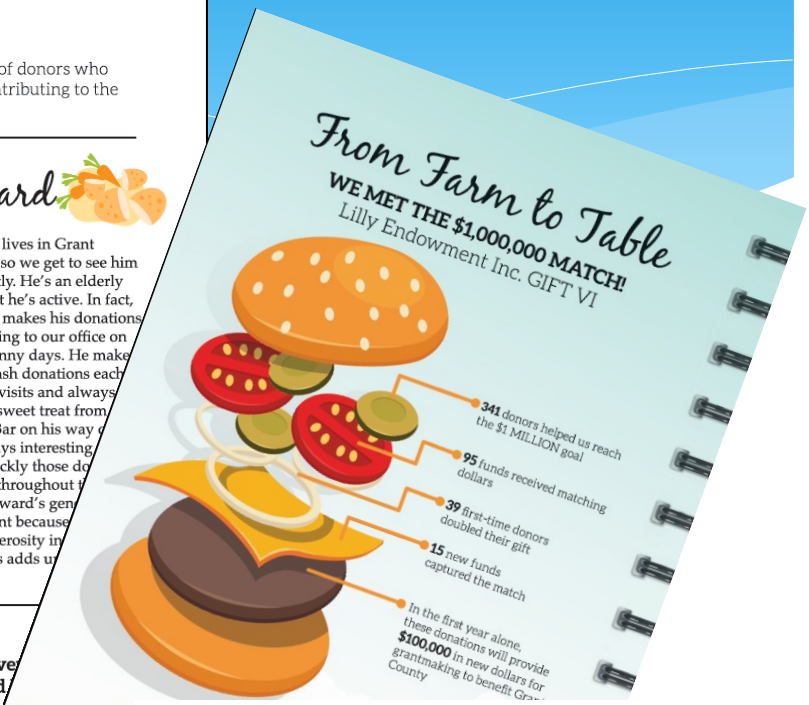
At a time in history when it is too easy to disconnect from human interaction, Grant County is still a place that

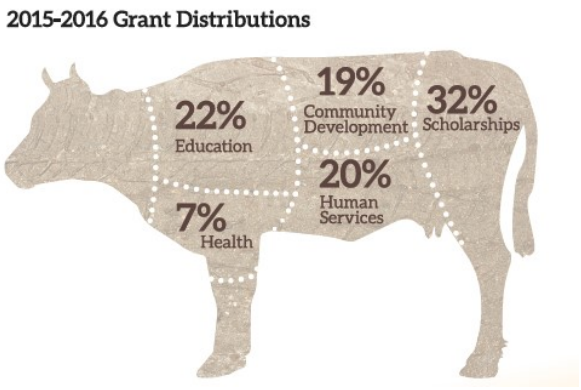


Step #6: Report

Create material people want to open and read!







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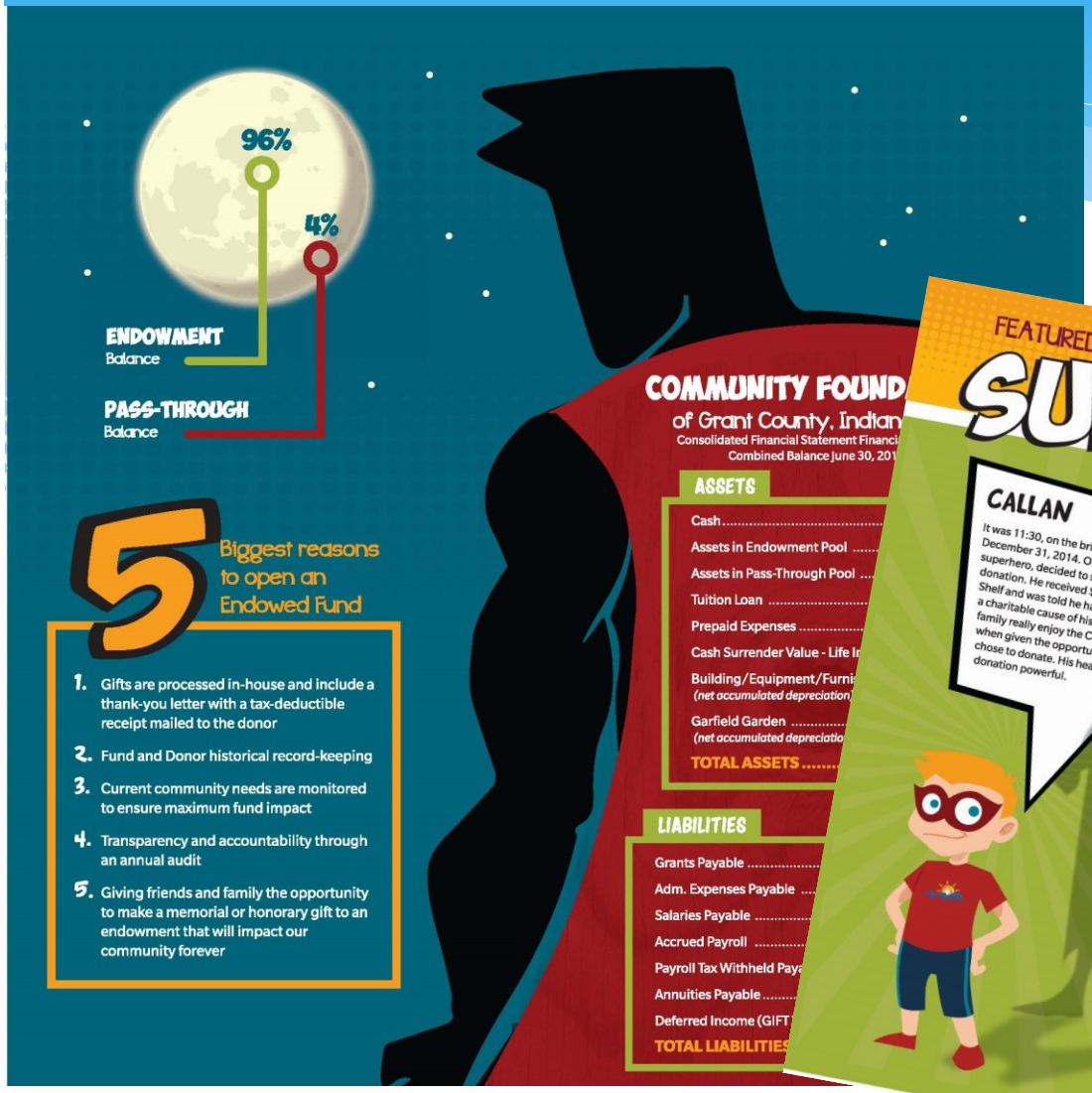


Step #6: Report

Create material people want to open and read!

CommunityFoundation

March 3, 2018

«Name»
«Organization»
«Address1»
«Address2»
«CitvStZip»

Dear «Salutation»:

Change. Some people like it, and some people don't. I'm one of the people who doesn't usually like change. But sometimes it's necessary, and makes good sense, so I'm willing to go with it because it's the right thing to do. This is one of those times that changing something is the right thing to do. I conducted a historic gift audit of the funds at the Community Foundation, and found that most funds that don't receive regular donations are holding steady instead of growing like we prefer. So, with growth in mind, the Board of Directors voted to change the spending policy from 4.5% for all funds to a stepped rate based on the average fund balance over the past five years. The steps are:

- 4.00% for average balances between $5,000 and $99,999
- 4.25% for average balances between $100,000 and $249,999
- 4.50% for average balances greater than $250,000

In other news, did you know that we also distribute around $500,000 in scholarships to Grant County students each year?! Today we are asking for you to donate some of your time by being a scholarship reviewer. We need help from reviewers to score each application. The scholarship review dates are March 5-23, 2018, it's all done online, and in your pajamas if you prefer! Sign up to be a reviewer today by visiting **Givetogrant.org/2018Review**.

And, of course, if you have any questions about the enclosed quarterly fund report, check, or any of the information we provided here, please call or email us. Working with you to build the fund that means so much to you, your family, and the community is yet another reason *we love where we live.*

Sending warm thoughts,

Sherri Rush
CFO and Donor
Sherri@GiveToGrant.org

Dawn Brown
CEO and Donor
Dawn@GiveToGrant.org

…and the rest of the Foundation Team

P.S. If you missed our *Love Where You Live Annual Report*, you can find it online at GiveToGrant.org or get your own copy by stopping by our office. It's pretty incredible…you should check it out!

505 West Third Street, Marion IN 46952 – (765)662-0065 – www.GiveToGrant.org
"Connecting people who care with causes that matter."

«FundName»

QUARTERLY FUND STATEMENT «FromDate» – «ThruDate»

Fund Information

FUND was established on «Established».

FUND PURPOSE: «GiftLanguage»

Quarter Fund Activity

BEGINNING FUND BALANCE ON «FROMDATE»	$«M_35Beg_Fund_Bal_PSQuarter_2»
INCOME:	
Contributions to Principal	«M_81Contrib_to_PrincipalQuarter_2»
Contributions to Spendable	«M_85Contrib_to_SpenQuarter_2»
Investment Income (net of investment fees)	«M_200Inv_Inc_Net_of_FeesQuarter_2»
TOTAL INCOME	«M_205Contributions__PSIncQuarter_2»
DISBURSEMENTS:	
Grants, Scholarships, or Program Expenses	«M_120Expenses__PSQuarter_2»
Administrative Fees to Community Foundation	«M_210____Admin_Fees_to_CFQuarter_2»
TOTAL DISBURSEMENTS	«M_212Total_Disburs__PSQuarter_2»
NET CHANGE TO FUND BALANCE	«M_221Net_Change_to_Fund_BalQuarter_2»
ENDING FUND BALANCE (PRINCIPAL + SPENDABLE) ON «THRUDATE»	$«M_250Tot_End_Fund_Bal__PSQuarter_2»
ENDING PRINCIPAL BALANCE ON «THRUDATE»	$«M_230Ending_Fund_Bal__PQuarter_2»

Quarter Spendable Summary

BEGINNING SPENDABLE BALANCE ON «FROMDATE»	$«M_30____Beg_Sp_BalQuarter_2»
Contributions to Spendable	«M_85Contrib_to_SpenQuarter_2»
Less Grants, Scholarships, or Program Expenses	«M_114Expenses__SQuarter_2»
Transfer to Spendable to/from Principal	«M_220Total_Sp_Activity__SQuarter_2»
SPENDABLE AMOUNT AVAILABLE	$«M_240Ending_Fund_Bal__SQuarter_2»

«Special_Instructions»

Creativity is Intelligence Having Fun!

- ❑ Do something fun/active!
- ❑ Mail/email invites 3-weeks prior
- ❑ Who, what, where, when, why, cost
- ❑ Collect contact info
- ❑ Warm social atmosphere
- ❑ Each team member greets # people
- ❑ Invite small number – get to know them!
- ❑ Prompt follow-up mailing/email

- ✓ Cocktails and Canvas LNO Event = $8,000
- ✓ Ladies' Glam Night at the Gardens = New Fund and over $15,000 in donations
- ✓ Galentine's Day Event = New Endowed Fund

Step #6: From Events to Experiences

Create events people want to attend and enjoy!

CommunityFoundation
of Grant County, Indiana, Inc.

Cookie	1st Choice	2nd Choice
Do-si-dos®	Chardonnay	Malbec
Samoas®	Sauvignon Blanc	Chardonnay
Savannah Smiles®	Sparkling	Malbec
Tagalongs®	Chardonnay	Red Velvet
Thin Mints®	Malbec	Sparkling

«Name»,
you poetic, noble, land mermaid…
We hope you had a Happy Galentine's Day!

We think Galentine's Day really is the best day of the year. Isn't it great that there is a day designated to ladies celebrating ladies?! And we think YOU are so worth celebrating! So, treat yourself with this wine pairing list and maybe even a few Parks and Recreation reruns to really get into the spirit, if you need it.

CommunityFoundation
505 West Third Street
Marion, Indiana 46952

Give us a call before **March 11th** if you need to place a Girl Scout cookie order. We may be able to help with that. ;)

Step #6: From Events to Experiences

Create events people want to attend and enjoy!

CommunityFoundation
of Grant County, Indiana, Inc.
505 West Third Street ƒ Marion, Indiana 46952
www.GiveToGrant.org ƒ 765-662-0065

- ✓ **Led to new endowed fund; donor's bringing friends; new donors.**

Galentine's Day - Open House

At the Community Foundation

Featuring The Waffle Guy

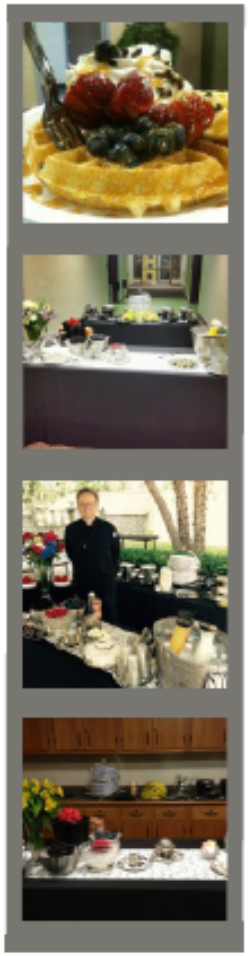
According to Leslie Knope from the TV show Parks and Recreation, **Galentine's Day** is a holiday that celebrates the importance of female friendship and empowerment.
It really should be a national holiday.

Normally celebrated on February 13th, we decided to get ahead of the game and honor some of the most poetic and noble land mermaids (that includes You) that we know in Grant County, a little early with brunch and waffles.

Stop by for an open house at the Community Foundation office anytime on February 11th between 10:00 and 1:00 for brunch/lunch with us and The Waffle Guy.

We celebrate and cherish you.
And remember what's important on Galentine's Day:
friends, waffles, work.
or waffles, friends, work.
Doesn't matter, but work is third.

RSVP before February 8th by emailing RSVP@GiveToGrant.org or call the office at 765-662-0065.



Step #6: From Events to Experiences

Create events people want to attend and enjoy!

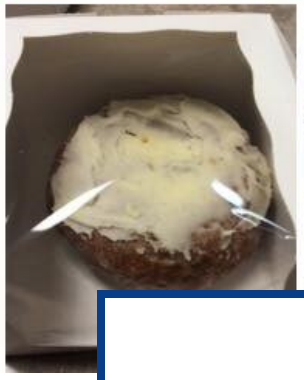
Thank you for joining us on Galentine's Day! It really should be a national holiday, don't you agree? We so appreciate our friends of the Foundation because we know you support all of the good things we are trying to accomplish in Grant County. –And we know you are walking right beside us, making a difference wherever opportunity presents itself.

How can you even further be a part of the good things happening in our community? Take advantage of a 100% return on investment with a $1 for $1 match on all gifts made before March 31, 2016 to our unrestricted funds like the Community Impact Fund.

These funds allow our Board of Directors to award grants annually towards the current most pressing needs in our community. So if you would like to support our local grantmaking, donate to the Community Impact Fund and have your donation doubled!

Step #6: From Events to Experiences

Create events people want to attend and enjoy!



CommunityFoundation
of Grant County, Indiana, Inc.

Random Act of Kindness

www.GiveToGrant.org 765-662-0065

#GiveToGrant #RAKgrantcounty

Step #6: From Events to Experiences

Create events people want to attend and enjoy!

In-laws & Outlaws
Gun Shop and Shooting Range
6070 East 500 South, Gas City

Followed by Tacos at Casa Grande
6732 East Amy Drive, Gas City—Just East of Cracker Barrel

Join us for a Board and Brush Party!

Hey «Salutation»!

We hear those sleigh bells jinglin' and you know what that means...it's time for another Ladies Night Out! Join us for a fun evening filled with friends and laughter.

Haven't yo
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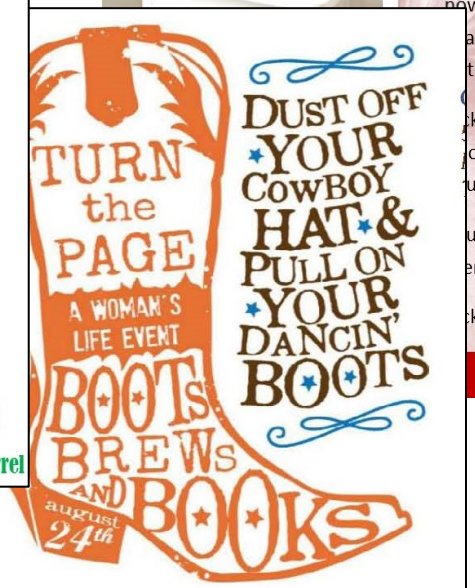


BOOTS, BREWS, & BOOKS
Bad Dad Brewery at Grains and Grill
407 W Washington St, Fairmount
August 24th 6-8:00 $40/ticket

RSVP by August 20th by calling 765-662-0065 or by emailing RSVP@GiveToGrant.org

EXTREME BINGO

Are you a music lover? Do you know all the words to every Elvis song ever made? How about who sang, "*Girls Just Wanna Have Fun*"? If so, a **Girl's Night Out** in the warmth of the Meshingomesia Country Club is perfect for you!

Come join DJ Sound Solution on February 26, 2015 from 6:00 – 8:00 as they present EXTREME MUSIC BINGO. DJ Sound Solution will provide all of your Bingo materials, Women's Life will bring fun prizes, and the Community Foundation will order up some drinks and appetizers. Now all we need is you to invite some of your girlfriends who just wanna have fun!

RSVP by February 24th to 765-662-0065.

SOUND DJ SOLUTION

Ladies Night Out

Rationale for change…

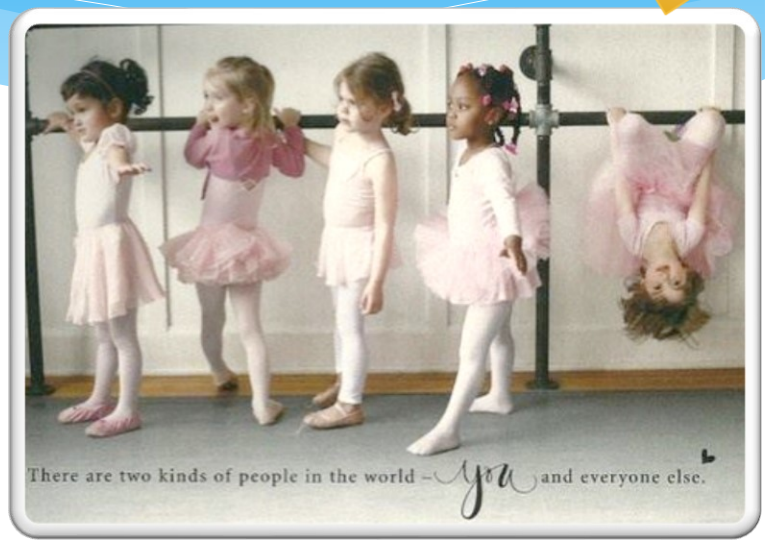
- More people ARE opening whatever we send.
- Our Stewardship is resulting in increased #donors, #donations, $donation totals.
- Our stories are being told and read… and retold.

Step #7:

Use your data to improve each year.

Questions to ask:

Me!

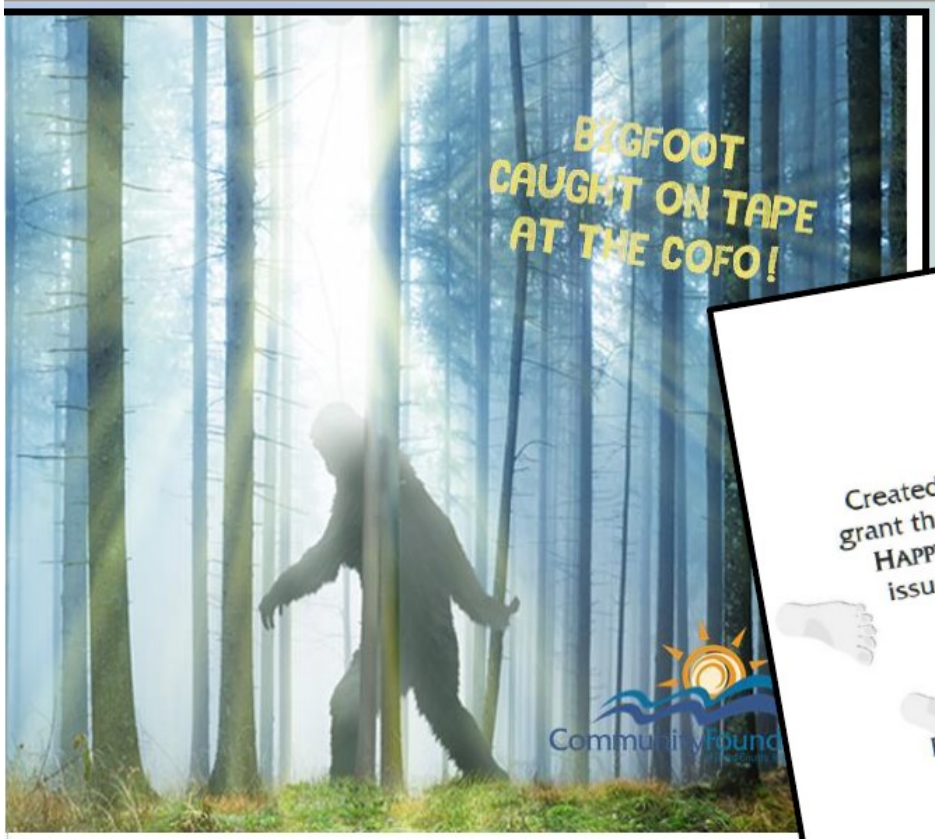


- Who will this help?
- How will it help them?
- What will the outcome be?
- Are we being courteous?

Questions to answer:

- What difference will my gift make?
- How is my money used?
- What will you do if I don't make this gift?
- Are there other orgs that do what you do?

Extra, Extra!



CommunityFoundation
of Grant County, Indiana, Inc.

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TYPE THIS INTO YOUR NEAREST INTERNET DEVICE
GiveToGrant.org

ENTER THIS NUMBER INTO YOUR MOBILE PHONE OR LANDLINE
765-662-0065

SEND US A NOTE USING YOUR EMAIL SERVICE OF CHOICE
SayHello@GiveToGrant.org

SWING BY THE OFFICE USING YOUR PREFERRED MODE OF TRANSPORTATION
505 West Third Street
Marion, Indiana 46952

«FINANCIAL ADVISOR», BIGFOOT WAS CAUGHT ON TAPE AT THE COFO OFFICE!

But then we realized it was actually **you** in disguise with these HANDY, LITTLE BIGFOOT FEET reminding us that even in the midst of uncertainty, you're here helping your clients meet their charitable goals through the CoFo. You have invested in your trusted CAMP PHILANTHROPY (AKA: The Community Foundation) to serve as a catalyst for positive change in Grant County. THANK YOU FOR STICKING WITH US (pun clearly intended)!!

Extra, Extra!

CommunityFoundation
of Grant County, Indiana, Inc.
505 West Third Street Marion, IN 46952

Mary Eckerle
505 W. 3rd Avenue
Marion, IN 46952

CommunityFoundation
of Grant County, Indiana, Inc.

Tuesday, August 25, 2020

We hope you are all hanging in there, getting ample rest and nourishment. It means a lot to know even when many of us are living like WOOKIEES undetected in the forest, our community knows how to stick together and find ways to support each other. We really are in this together!

Whether the FAMOUSLY ANTISOCIAL APE-MAN OF LEGEND is real or imagined, belief is part of who we are. And, when you make a gift to the Community Foundation, you are part of a COMMUNITY OF BELIEVERS. A community that believes in you! And, we thank you for believing in Grant County.

We know you have the choice of contributing to numerous worthy causes, so we want to extend a heartfelt thank you for giving to the Community Foundation on 05/26/2020. Without your generous gift to INTERN FUND in the amount of $3,789.28, this fund couldn't fulfill its purpose to administer the Lilly Intern grants.

Extra, Extra!

LEAVE A GIFT TO THE CHARITABLE CAUSES YOU CARE ABOUT MOST IN YOUR WILL

Many of our donors choose to leave gifts to charity in their will. Are there any causes you are passionate about in our community? Provide this **SAMPLE GIFT BEQUEST LANGUAGE** below to your attorney or professional advisor when planning to include a gift in your will or estate plans for The Community Foundation of Grant County. And then notify us so that we can insure your gift will benefit the causes you care about most and in the way you intend. Call us at 765-662-0065 with any question on how to leave a lasting impact in Grant County.

SAMPLE GIFT LANGUAGE:

I give and bequeath and devise to The Community Foundation of Grant County, Indiana, Inc., a 501(c)3 non-profit corporation organized under the laws of the State of Indiana and located in Marion, Indiana:

_____ percent (_____%) of my estate

OR the sum of $_____

OR all my right, title, and interest in the following described property: _____

OR all rest, residue, and remainder of my estate to be used for the following purposes:

_____

_____

IMPORTANT DETAILS:

- Tax Identification Number: 31-1117791
- Legal Name: The Community Foundation of Grant County, Indiana, Inc.
- The Community Foundation is an IRS nonprofit corporation under the laws of the State of Indiana.

Created just for you by your **COMMUNITY FOUNDATION TEAM** and paid for by a grant that supports our annual operation's budget. It was carefully printed by **HAPPY PEOPLE** in **MATCHING FLANNELS**. What's not to love? If you have any issues at all please choose one of the following and we'll help you out:

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GiveToGrant.org	**SayHello@GiveToGrant.org**	**765-662-0065**	**505 West Third Street Marion, Indiana 46952**

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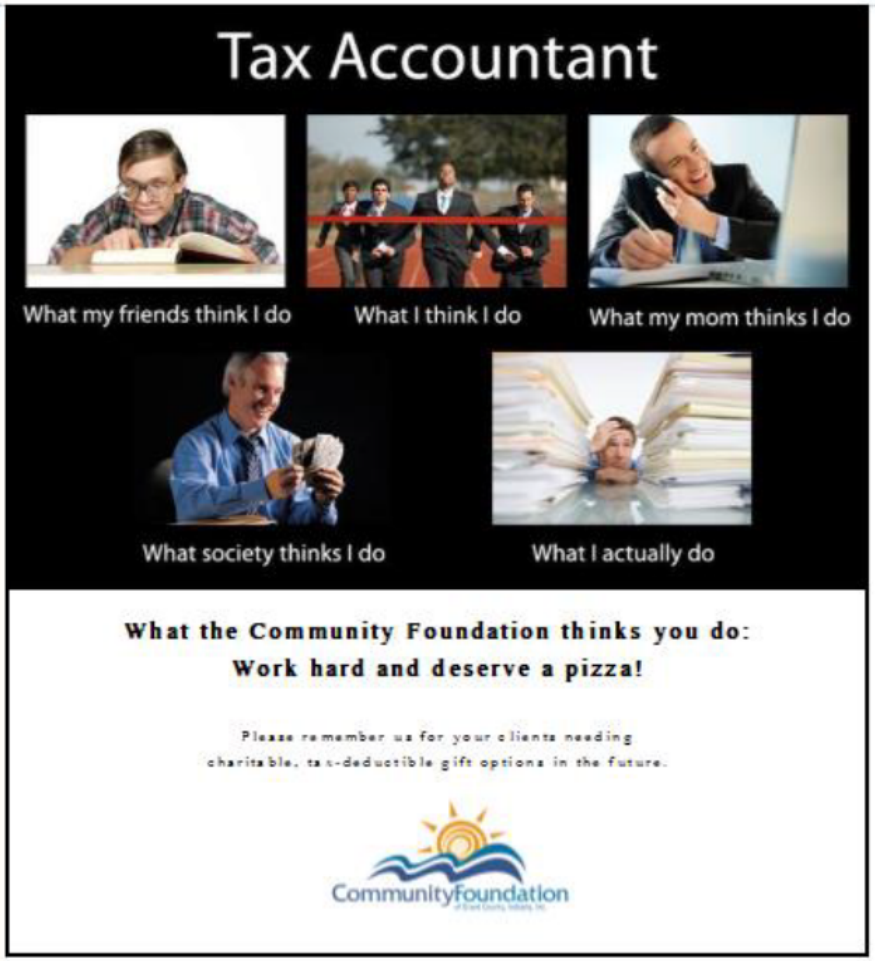

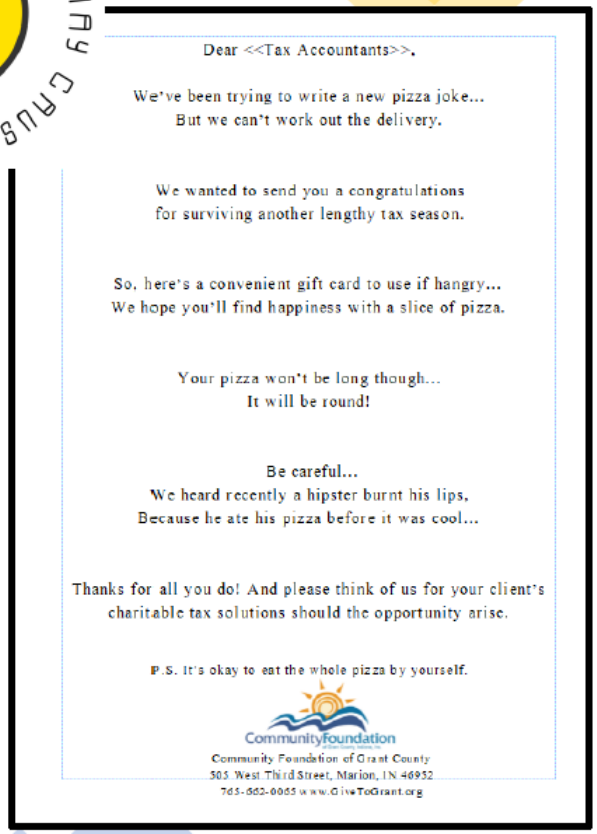

Dear <<Tax Accountants>>,

We've been trying to write a new pizza joke...
But we can't work out the delivery.

We wanted to send you a congratulations
for surviving another lengthy tax season.

So, here's a convenient gift card to use if hangry...
We hope you'll find happiness with a slice of pizza.

Your pizza won't be long though...
It will be round!

Be careful...
We heard recently a hipster burnt his lips,
Because he ate his pizza before it was cool...

Thanks for all you do! And please think of us for your client's
charitable tax solutions should the opportunity arise.

P.S. It's okay to eat the whole pizza by yourself.

CommunityFoundation
Community Foundation of Grant County
505 West Third Street, Marion, IN 46952
765-662-0065 www.GiveToGrant.org

QUESTIONS?

Dawn Brown

President/CEO

Community Foundation of Grant County, Indiana, Inc.

Dawn@GiveToGrant.org

www.GiveToGrant.org