

A Guide to Using Community Foundation Tools

community foundation
PORTFOLIO

≈ CHARITABLE IRA ≈

Version 4.0



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For technical assistance on community foundation portfolios, please contact your local graphic design/production resource.

For more information about community foundation portfolios and all National Marketing Action Team activities and products, please visit CFMarketplace.org.

Special thanks to the Charles Stewart Mott Foundation, funder of this project. Many thanks for the contributions made to the toolkit in the past including The National Marketing Team (NMAT) who oversaw development as well as to Midwest Community Foundations' Ventures for updates made in 2010.

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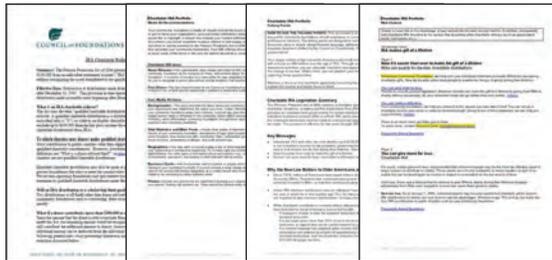
Layout software

Some tools in this portfolio have been created in Adobe® InDesign CS5 for Macintosh® OS. Adobe InDesign for Macintosh OS and Adobe InDesign for Windows® can read each other’s files, so you can easily transfer documents between the two platforms. However, you must use the identical versions of your fonts on both systems to ensure that your formatting does not change. Adobe, Acrobat, Reader, and Postscript are registered trademarks of Adobe Systems Incorporated in the United States and/or other countries. Windows operating system, Microsoft PowerPoint, and Microsoft Word are trademarks and/or registered trademarks of Microsoft Corporation in the United States and/or other countries. Macintosh is a registered trademark of Apple Computer, Incorporated in the United States and/or other countries. All other trademarks are the property of their respective owners. Any omission of such trademarks from any product is regretted and is not intended as an infringement on such trademarks.

Portfolio at a glance

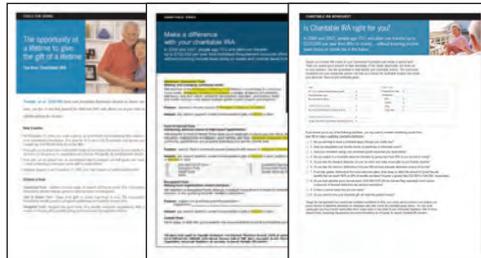
Internal Documents

- Fact sheet
- Media kit recommendations
- Talking points
- Web content



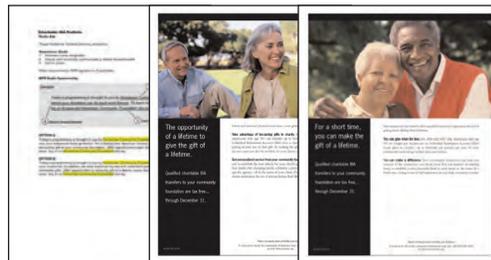
Tools for Giving

- Opportunity of a lifetime tool
- Charitable fund options
- IRA worksheet



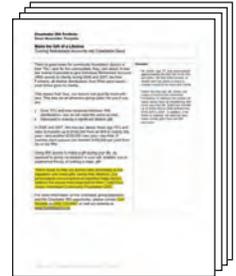
Ads

- Radio ads
- Advisor ad
- Donor ad



News Releases and Newsletters

- 2013 extended law release
- Local gift release
- Newsletter content
- Professional advisor e-news



Presentation

- Community philanthropy update



Ideas for Giving

- IRA ideas for giving (single)
- IRA ideas for giving (couple)



Letters

- Donor tool cover letter
- Professional advisor tool cover letter
- Administrator letter
- Donor gift letter



Part One
portfolio tools

Charitable IRA opportunity

Legislation was passed that extends the Charitable IRA, activating some charitable giving provisions many in the philanthropic community have long awaited.

“The Charitable IRA” opportunity, as it is called, means that, through 2013, Americans age 70½ and older can make IRA contributions to public charities without paying federal tax.

Millions of Americans have billions of dollars in individual retirement accounts (IRAs). For years, estate planners have recommended that in larger estates these assets may be the most tax effective asset to distribute to charity. These assets are not only vulnerable to heavy taxation as part of an estate, but they also can be taxed again as income of heirs.

Until now, there was a disincentive for retirees to give IRAs to charity during their lifetimes because withdrawals from IRAs were subject to income tax—even those given to charity.

But thanks to the legislation, Americans who are of age can make tax-free IRA contributions to public charities, such as community foundations.

When marketing this opportunity to prospective donors and IRA account administrators, it is important to recognize certain limitations. Holders of traditional and Roth IRAs who are of age can make direct charitable transfers up to \$100,000.

A single person can transfer \$100,000 tax-free during 2013. A married couple can transfer up to \$200,000 tax-free, over the same period, from separate accounts.

There are limitations on the types of funds eligible for tax-free lifetime transfer of IRA assets. Gifts to Donor Advised Funds, Supporting Organizations and most private foundations do not qualify for the special tax treatment. Your community foundation may use IRA conversations as an opportunity to promote these less-restricted fund types: Designated Funds, Field of Interest Funds, and Unrestricted Funds.

Prospective donors should be encouraged to discuss IRA giving, as well as the tax advantages of giving other assets, with their professional advisors. In many cases, a donor’s appreciated assets would still be taxed most heavily if given to anyone but charity.

Tools within the portfolio are designed to complement others released in previous marketing portfolios. You can choose to customize these tools or simply use their messages in ways that suit your organization and community.

Advertisements

You may choose to generate local or regional interest in the Charitable IRA opportunity by placing ads in targeted publications or on radio stations.



Donor ad

This ad describes the time-limited opportunity to give a lifetime IRA gift tax-free. It also tells, in brief, how your community foundation can help donors use their IRAs to give more for less and make a difference.

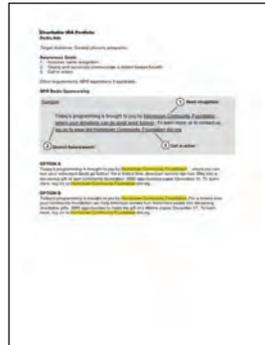
file name: IRA5_donor_ad_4.zip
 IRA5_donor_ad_4.pdf



Advisor ad

This ad targets estate and financial planners, emphasizing the tax savings involved with lifetime IRA gifts, as well as the personalized service your community foundation can offer to donors and their advisors.

file name: IRA5_advisor_ad_4.zip
 IRA5_advisor_ad_4.pdf



Radio ads

Choose from two versions of a Charitable IRA radio ad you can place on the air via your local radio stations.

file name: IRA5_radioads_4.doc

Media outreach

As an expert in philanthropy for your local area, you'll want to supply your local media outlets with the facts concerning the renewed legislation, the charitable good it could unleash in your community, and the vehicles your community foundation offers to IRA holders interested in making a lifetime gift.

Note: In many states, donors transferring IRA assets of \$100,000 or less will be exempt from state income taxes as well as federal income tax; however, it is recommended that you confirm this with your individual state. If a charitable distribution from an IRA is subject to state income tax, it is best to make that explicit in your communications.



Media kit recommendations

This internal checklist describes components of a strong, local IRA media kit that brings together tools found in the Charitable IRA Portfolio, as well as your community foundation's own core media pieces.

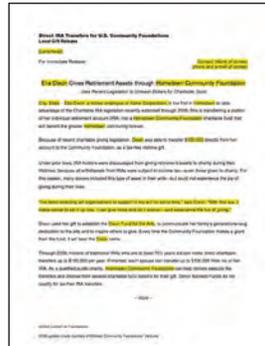
file name: *IRA1_mediakit_4.doc*



New law release

This release announces the extended legislation, describes its charitable potential, and positions community foundation funds as ways of releasing that potential for local good. Customize the release with local quotes and data and issue it on your letterhead.

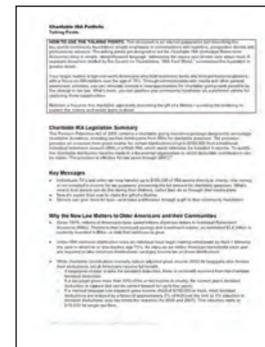
file name: *IRA2_localrelease_4.doc*



Local gift release

Customize and issue this template release to generate media attention when your community foundation receives its first lifetime IRA gift.

file name: *IRA2_gifrelease_4.doc*



Talking points

This internal document prepares you to discuss the IRA opportunity—and the distinct value of giving an IRA through your community foundation—with reporters and others.

file name: *IRA1_talkingpts_4.doc*



Fact sheet

This multi-page document, provided by the Council on Foundations, summarizes the IRA opportunity and answers common questions for reporters.

file name: *IRA1_factsheet_4.pdf*

Donor outreach

From experience, we know that the largest, least restricted gifts come from donors who have a history of positive encounters with the community foundation—people who have developed trust. Because of this, we anticipate that community foundations are not likely to receive IRA gifts from people unfamiliar with their organizations.

The best pool of prospects is that of your existing donors, particularly those at or about age 70, and those financially comfortable enough to part with \$100,000 from their IRAs.

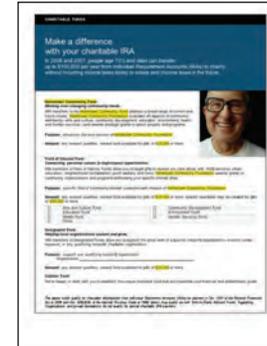
Note: In many states, donors transferring IRA assets of \$100,000 or less will be exempt from state income taxes as well as federal income tax; however, it is recommended that you confirm this with your individual state. If a charitable distribution from an IRA is subject to state income tax, it is best to make that explicit in your communications.



Opportunity of a lifetime tool

This tool describes the Charitable IRA opportunity and how it works in concise language that is easy to understand. It also includes a brief donor scenario.

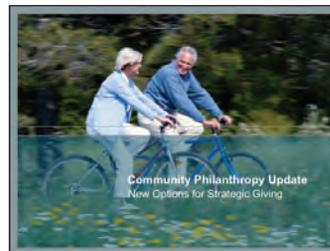
file name: IRA4_oppoflifetime_tool_4.zip
 IRA4_oppoflifetime_tool_4.pdf



Charitable fund options

This handout describes the key community foundation funds eligible for tax-free IRA transfers.

file name: IRA4_fundopts_tool_4.doc



Philanthropy update presentation

This presentation and its speaker notes will help you share the IRA lifetime giving opportunity with groups, from Rotary to retirement communities. Doing so reinforces your role as a community leader and local source of philanthropic knowledge. Consider using this presentation to make IRA the topic of any speaking engagements you've planned for 2013.

file name: IRA6_update_4.ppt



Donor newsletter content

Add to your next donor newsletter with this brief article that positions Charitable IRA as one way to "make the gift of a lifetime." Personalize this article with a quote from your community foundation's executive director.

file name: IRA1_newsletter_4.doc



Ideas for giving

These two donor scenarios illustrate several key considerations and benefits for making an IRA transfer to charity during your lifetime. Donor stories provide one of the best ways to illustrate complex giving situations for donors and advisors.

*file name: IRA4_single_idea_4.zip
IRA4_single_idea_4.pdf*

*file name: IRA4_couple_idea_4.zip
IRA4_couple_idea_4.pdf*



Donor cover letter

This letter recognizes a donor's generosity and relationship to the community foundation, introduces the IRA opportunity, and presents the recipient with several enclosures/attachments to help him or her evaluate the opportunity. Format this to your community foundation's letterhead or send as body text of an e-mail. Appropriate attachments/enclosures include charitable funds (options), the IRA tool for giving, and IRA ideas for giving.

file name: IRA3_donorltr_4.doc

Advisor outreach

In your outreach to professional advisors, begin with bankers—the likely administrators of individual retirement accounts. The key to reaching these advisors is to make the opportunity easy to understand, help them anticipate and field donor inquiries, and administer the transaction.

When approaching account administrators, know that your community foundation’s policy will certainly impact your ability to interest them in this way of giving. They will be uninterested in any proposal to take assets from their institutions. If your community foundation doesn’t have a plan for retaining charitable assets with a banker’s particular institution, this may be a barrier.

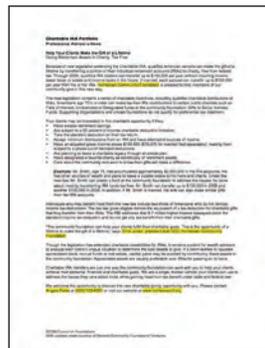
It is important to keep in mind that IRA administrators will also be bothered by the prospect of small transactions from the accounts in their charge. This is one reason to limit your target to higher net worth clients.



Charitable IRA worksheet

This checklist helps advisors have a conversation with clients about Charitable IRA. It asks 10 questions that may identify someone as a good candidate for giving an IRA as a lifetime gift, and it gives the advisor a place to chart the client’s charitable and estate goals relative to the IRA opportunity.

file name: IRA4_worksheet_tool_4.zip
IRA4_worksheet_tool_4.pdf



Professional advisor e-news

Paste this newsblast into the body of an e-mail or an existing e-newsletter format and send it to advisors on your distribution list. This article describes the IRA giving opportunity, donor profiles and provides a simple example. Customize it with a quote from your community foundation’s executive director.

file name: IRA2_advenews_4.doc



Donor gift letter

By supplying this letter to interested clients, the account administrator helps an IRA donor notify the community foundation that an IRA gift is coming—beginning the conversation about what fund type the donor would like to establish or contribute to, and providing the community foundation the information it needs to recognize the gift with a receipt letter, which the donor needs to receive the gift’s tax benefit.

file name: IRA3_donorgiftltr_4.doc

Certified public accountants are another appropriate Charitable IRA audience because of the frequency of interactions they'll have with their clients, and the timing of this contact for year-end gifts.

The final specific group of advisors you may choose to target for IRA gifts is estate planners because these professionals will know if their clients are designating retirement assets for charity in their wills.

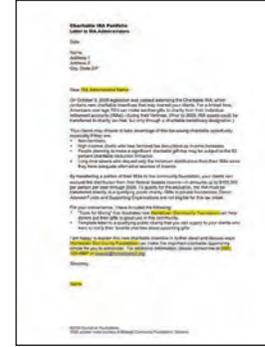
Whether you're targeting bankers, accountants, estate planners or some other subset of advisors, it's best to spend the most time with those who know your community foundation, have demonstrated an interest in community, and have clients who match the IRA donor profile.



Professional advisor cover letter

This letter introduces the Charitable IRA opportunity and positions your community foundation as a philanthropic resource that can help clients use their IRAs to accomplish charitable and financial objectives. Format it to your letterhead and send with it the Charitable IRA worksheet, the IRA tool for giving, and the two IRA ideas for giving.

file name: IRA3_advisorltr_4.doc



Administrator letter

Send this letter to targeted retirement account administrators. It introduces the Charitable IRA opportunity, profiles the clients most likely to benefit from giving in this way, and positions your community foundation as a philanthropic resource that can help clients use their IRAs to accomplish charitable and financial goals. Format this letter to your community foundation letterhead and send with the IRA tool for giving and donor gift letter.

file name: IRA3_adminltr_4.doc

Web content

Probably the most comprehensive database of information that the portfolio includes is web content. Suitable for any community foundation audience, the content contains high-level positioning for the IRA opportunity, as well as deep dives in the form of questions and answers. Because of its depth, you may also find this content a useful supplement to your talking points or other communications that you may develop.



Web content

This website content provides a depth of information on the Charitable IRA opportunity. Format as much or as little of it as needed to create informative, easy-to-navigate web pages on the subject. To help web visitors find this content, you may want to create a temporary news link to it on your homepage.

file name: IRA1_webcontent_4.doc

Recommended marketing activities

Now that the Charitable IRA Portfolio is available, here are some recommended activities to reach out to key audience groups.

Today

Promote this giving opportunity

News release: law extended

- Review opportunity with board and staff
- Post initial news release to website
- Pitch news release to local media
- Send news release to professional advisors
- Donors and prospects who are 70 ½ and older
- Nonprofits that have existing Designated Fund
- IRA plan administrators
- Other professional advisors, especially estate planners and certified public accountants

Communications calendar:

- Integrate with year-end communications: mailings, newsletters, e-mail, meetings, events
- Identify presentation opportunities
- Plan for next year's communications
- Consider paid and earned media opportunities

Update board and staff and assign roles

Internal documents: fact sheet, media kit recommendations, talking points, etc.

Update website with new detailed content

Internal documents: web content

January-December 2013

Send letters to professional advisors

IRA plan administrators

Administrator letter, Donor gift letter, Tool for giving: opportunity of a lifetime

Estate planners and CPAs

Professional advisor tool cover letter, Tools for giving: all, Ideas for giving: all

All other advisors

Professional advisor tool cover letter (edited), Tools for giving: opportunity of a lifetime tool and IRA worksheet

Send letters to donors and prospects

Donor letter, Tools for giving: opportunity of a lifetime tool and fund options worksheet

Focus on 2013 gifts of \$100,000

Entire portfolio

Continue raising awareness

Newsletter content, Presentation: community philanthropy update, Tools for giving, Radio and print ads

Celebrate donor gifts of a lifetime

News release: local gift

Focus on targeted opportunities

Entire portfolio

Continue to raise awareness

Presentation: community philanthropy update, Professional advisor e-news letter, Tools for giving, Radio and print ads

Celebrate donor gifts of a lifetime

News release: local gift

Part Two

customizing and producing tools

Software requirements

Tools in the portfolio have been created in Microsoft Word for Windows®, Microsoft PowerPoint for Windows, and Adobe InDesign CS5 for Macintosh OS. This version of InDesign is currently the most widely used software program for graphic design and publishing.

Tools designed in InDesign are available for your use as InDesign files (e.g., IRA5_donor_ad_4.indd) that are contained online in ZIP files (e.g., IRA5_donor_ad_4.zip) and as PDF files (e.g., IRA5_donor_ad_4.pdf). You can view and print the PDF files using Acrobat Reader.

Your community foundation can invest in the software and fonts to use these tools, or you may find it more efficient to work with a graphic designer or printer who can customize the tools for you. Whether you customize these tools in-house, or send them to a designer or printer for personalization, it is essential to use fonts identical to the ones in the design files. Using another font, or the same font in another format, will change the layout. To preserve the quality of the tools in this portfolio, use only Adobe PostScript Type 1 Minion and News Gothic.

In order to customize these tools in any way, you will need access to one computer system equipped with:

software: Adobe InDesign CS5

font families: Adobe Minion Postscript Type 1 (nine faces)
Adobe News Gothic Postscript Type 1 (four faces) *Both font families are available at <http://www.adobe.com/type>. Search for “Minion Postscript Type 1” and “News Gothic Postscript Type 1” using the keyword search function.*

printer: If you are using Windows operating system, or Macintosh OS X, you have the software you need to display and print Postscript fonts. If you are using earlier operating systems, you may need AdobeType Manager, a free system software component to display and print these fonts available at <http://www.adobe.com/type>.

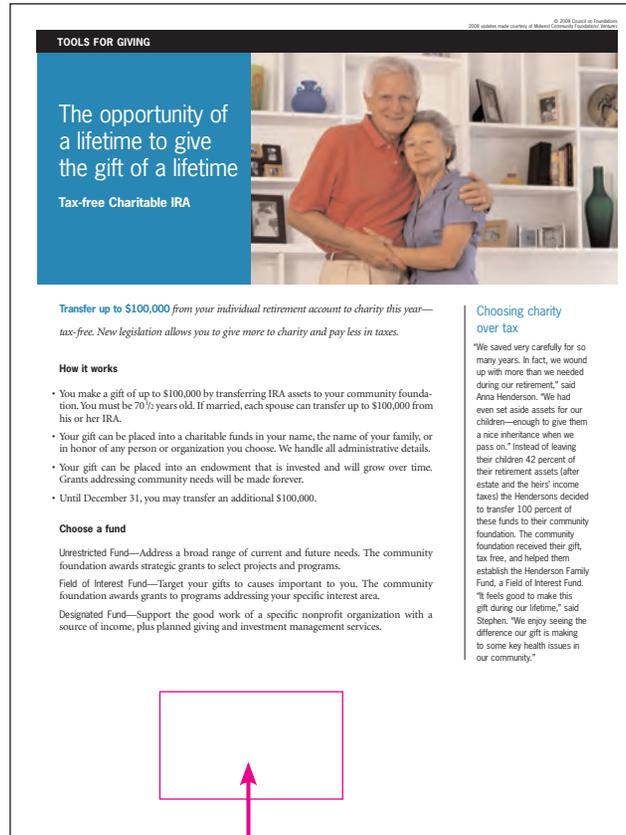
Customizing your tools

Tools within the Charitable IRA Portfolio are designed to offer the maximum amount of relevant information while maintaining opportunities for customization. Tools such as Opportunity of a Lifetime can be printed and used as is. However, it is recommended that you add your community foundation logo to each document as illustrated to the right.

The newsletter and release templates require more than just a logo. Items highlighted in yellow indicate a need for information specific to an event, the community, a donor, or the foundation.

To review any of the materials in this portfolio, you will have to download files from CFMarketplace.org. For materials in this guide that include more than one file and format, download the PDF file (e.g., IRA5_donor_ad_4.pdf) to review in Acrobat® Reader®. Download the ZIP file (e.g.IRA5_donor_ad_4.zip) for production files that can be modified using Adobe InDesign software.

Note: When importing electronic art files into non-PowerPoint documents, use the JPG file format for your logo and photographs.



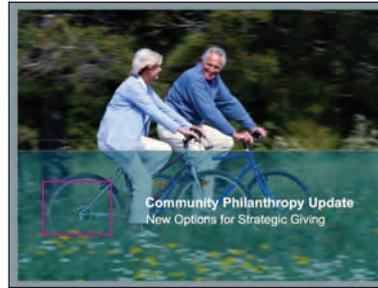
Place your logo and contact information in this area, or attach a business card.

Customizing your PowerPoint presentations

At right are illustrations of slides from portfolio presentations that you should customize with your local community foundation’s information, identity, and/or statistics. In addition, you may choose to substitute your own images for the stock photography currently included in the presentation.

To the right are invitation and presentation slides that need to be customized to reflect community foundation identity and information, area statistics, speaker topics, donor stories, etc. Please notice that illustrated to the right are pink boxes identifying those items needing customization. In each event presentation template, some slides have example copy already in place. This language may be appropriate to keep, but you should confirm that before presenting.

Note: Not all slides requiring customization are featured on this page. Please review each presentation thoroughly for customization opportunities before presenting.



Insert your foundation logo



Customize qualifying amounts



To view a PowerPoint script, pull down “View” menu, and select “Notes Pages.” To print, select “Notes Pages” in your print dialog box.

Helpful hints

Electronic slides should not be copy-intensive. Include only the important facts in short phrases; the presenter should expound upon and further clarify the points that appear on screen. Use the slides provided here as a guide for determining the length of headlines and copy points.

Personalize your presentation with local facts and preferred language. Show local pictures if you have them. Try to show images of people who might be recognized by your audience.

PowerPoint presentations: Use JPG, PNG, GIF file formats for your logo; use JPG or PNG file formats for photographs.

Plan ahead. What computer will be used for the presentation? Have you tested the presentation on this computer? Will you be using a projection device? Do you have printouts of the presentation—a backup plan in case of a technology glitch?

Production guidance

There are several options for producing print materials to meet your local needs and budget. You can seek the help of a local print vendor (lithographic/digital printer or copy center), or print the tools at your office (laserjet or inkjet printer, copy machine). Choose your production formats and options based on the quantity you need, your community foundation’s budget, lead time available, and the image you want to portray. Use the table at right to help you decide which method is best for your community foundation.

Production options: making the right choice			
	<i>How many do I need?</i>	<i>What is my budget?</i>	<i>How much time will it take to produce?</i>
Print at your own office	1–100 copies	\$	One day
Print at copy center	100–500 copies	\$\$	A few days
Use a local print vendor	500 copies +	\$\$\$	One to two weeks
Distribute online	Unlimited	\$	One day

A few things to consider

Use of color. Communications printed in color have a greater visual impact and therefore are more likely to be read. Color can also increase the readers’ ability to remember what they have read.

Use of paper. Whether printing from your office laserjet or at your local print vendor, the paper used can have an impact on the perceived value of a piece. Heavier papers tend to increase the value (and also the cost). Make sure that the weight of the paper is not too heavy to run through your laser or inkjet printer.

Quantity. If you have materials printed at your local print vendor, consider printing enough for a full year; it’s more cost effective. Each time you get something printed, you are paying a “setup” charge, regardless of how many copies you print. When determining print quantities, be sure to add enough for your advisors to distribute to their clients.

Consistency. We suggest you mix and match tools to create customized packets for your various professional advisors. Match printing methods and paper on all tools whenever possible for a consistent appearance.

Using a local print vendor

The portfolio has been designed for you to use with the professional printer of your choice. After planning a tool usage strategy, follow the steps below to customize and produce materials for your community foundation.

1. Some of the external tools in this portfolio are designed for print production and are Adobe InDesign (Macintosh) files that your local graphic designer or print vendor can help you customize and produce. Print out a copy of each tool you want to produce by using the corresponding PDF files. Use these PDF file printouts to show your vendors what the tools look like. Note that some tools print on one side only, while others print on two sides.
2. Take the following items to your print vendor:
 - Printout of the pieces you want to produce
 - The ZIP file containing production files (you may burn this to a CD or e-mail it to your print vendor)
 - A crisp, high-quality version of your community foundation's logo. Provide either an electronic file (TIF or EPS art file) or camera-ready artwork
 - Your foundation's contact information, which can be typeset by your print vendor.
3. Explain that your logo should appear in the designated area, along with your contact information. Request to review a proof with your logo and contact information in place.
4. Request a print quote following the procedure described in the box at right.
5. Tell the printer how many copies you need and when you need them.

Obtaining a print quote. *Before printing a piece, it's wise to obtain a quote. This requires a basic understanding of the variables that determine the cost of a print job.*

Quantity

Budget constraints may lead you to conclude that you should print fewer pieces for a lower print bill. However, you should always consider the unit cost. Printing a larger quantity lowers the unit cost. For example, if you print 1,000 pieces at a total cost of \$1,000, the unit cost is \$1 each. If you print 2,000 pieces, the total cost might increase to \$1,500, while the unit cost is reduced to \$0.75 each. This is because much of the cost of printing is in the initial setup of the job. You pay the same "setup fee" regardless of the number of pieces you print.

Inks

The pieces in the portfolio may be printed in four-color, in two-color, or in one color only (usually black). Your printer can compare prices for the same piece with different color options. It's up to you to determine how much you are willing to spend for the added impact of color. Depending on the type of paper and

production process chosen, your print vendor might also suggest the pieces be protected by the use of a varnish or aqueous coating.

Paper

Paper choice can significantly affect the cost of the job. Your printer can help you choose the appropriate weight, grade, color, and finish options for each piece. Your printer understands how to specify paper if you communicate your budget and your intended usage of the piece. If you plan on running preprinted tools through your laser printer to "imprint" them with your logo at a later time, be sure to tell your vendor—he or she should specify a laser compatible sheet.

Delivery dates

Planning adequate time in the production schedule can save money. Some printers have rush charges for printing within a

shorter than standard timeframe. One to two weeks is usually adequate for typical print projects, but check with your printer ahead of time.

An important note about fonts

The fonts used in all community foundation tools are PostScript Type 1 Font Format News Gothic and Minion. Because of font licensing restrictions, it is not possible to distribute fonts in this portfolio. Most print vendors should own or be able to obtain a licensed copy of these fonts, and can use them to customize and produce your tools. If you wish to purchase your own licensed copy of these fonts to customize the tools, contact the manufacturer/distributor, Adobe Systems Incorporated. To view the fonts online and order/download them, visit www.adobe.com/type.

Requesting a print quote

Use this form as a guide for a conversation with your print vendor. Fill out all the information that you can; your printer can make recommendations where you are uncertain about the specifications.

Project name _____

Quantity _____

Number of inks _____

Number of pages _____

Size flat _____

Size trimmed _____

Paper stock(s) _____

Binding _____

Release date _____

Delivery date _____

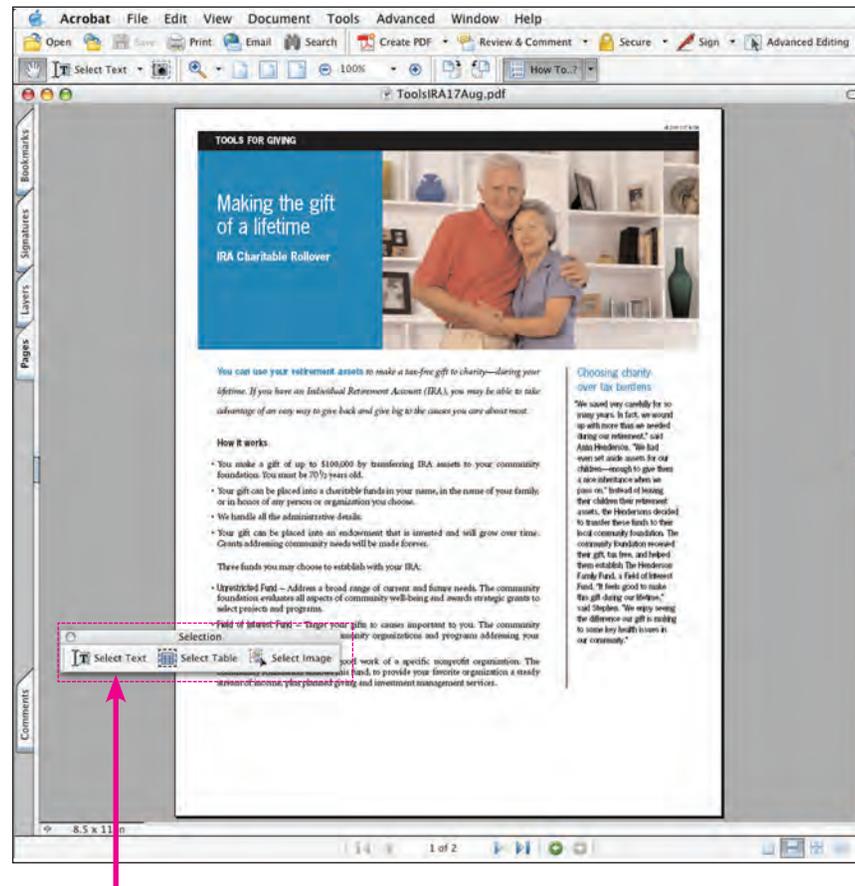
Other _____

Printing at your local office

For your own viewing and small-quantity printing needs, the portfolio includes Adobe Portable Document Format files, commonly called PDF files. Virtually any computer can open PDF files using Acrobat Reader. These files are “read-only” and cannot be edited or customized. It is possible, however, to extract text from PDF files to use in word documents or other software applications. Use the Select Text Tool to highlight the text you want to extract, copy (control/command + c), and paste (control/command + v) into the application of your choice. When printing a PDF file, make sure page scaling is “None.” Some programs default to “Fit to Paper.” This will print your document at 94% rather than 100%.

When printing a two-sided document like Opportunity of a lifetime, a high quality paper stock is recommended. Avoid using common “copy paper.”

Note for Windows users: If you are experiencing problems when printing an Adobe PDF file (i.e., text running together without proper spacing), try selecting “print as image” in the print dialogue box.



Use the **Select Text Tool** to select and copy text in Acrobat Reader.

Using rights-protected images

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Compliant



Noncompliant



Users of the Charitable IRA Portfolio are not licensed to import supplied images into any other communication materials. License for these images is limited to those layouts in which they are supplied.

Portfolio Evaluation

Feedback form

Please use the form below to help us evaluate the tools. We ask that each community foundation CEO fill out the form after having used the materials for three months. Please fax the form to the number listed at right. Your experiences and evaluation of the local tools will allow us to identify key learnings that will influence the development of future communications products.

SEND YOUR FEEDBACK TO:
 Community Foundation Services
 Council on Foundations
 e-mail community@cof.org.

1. Your community foundation name (for follow-up purposes):

2. Overall, how well is the portfolio working for your community foundation?

Very well Somewhat well Not at all well

(If you answered *Somewhat well* or *Not at all well*, please explain your answer.)

3. After using these tools, do you have any suggestions for how they might be improved?

4. Do you have any experiences to share about how you have used the tools effectively?

5. Do you have any suggestions (based on these tools) for the development of future communications products that would better meet your needs?

6. How user-friendly did you find this portfolio of tools, in terms of the technology involved?

7. Please rate the overall usefulness of the internal tools included.

Very useful Somewhat useful Not at all useful

8. Were the following tools effective with the audiences listed in the matrix below? (Check all that apply.)

	Staff/Board	Professional Advisors	Current Donors	Potential Donors
PowerPoint presentations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Donor tools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Web content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advisor communications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideas for giving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
News releases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Community Foundation Portfolio
Charitable IRA

Version 4.0

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