community foundation
PORTFOLIO
DONOR ADVISED FUNDS
Release 2.0
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For technical assistance on community foundation portfolios, please contact your local graphic design/production resource, or e-mail support@nmat.org.

For more information about community foundation portfolios and all National Marketing Action Team activities and products, please visit CFMarketplace.org.
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Fonts
As copyrighted material, fonts cannot be legally provided in this portfolio for distribution purposes. To purchase a copy of the PostScript® Type 1 Font Format used in these layouts (Minion and News Gothic), please contact the manufacturer of these fonts, Adobe® Systems Incorporated. To view fonts online and order/download them, visit www.adobe.com/type. Please see page 11 for details.

Layout software
Some tools in this portfolio have been created in QuarkXPress™ version 6.5 for Macintosh® OS. QuarkXPress for Macintosh OS and QuarkXPress 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. Quark and QuarkXPress are trademarks of Quark, Inc. in the United States and/or other countries. Microsoft, Windows, Windows 2000, Windows XP, PowerPoint, and 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

Donor Advised Funds internal strategy materials

Core marketing tools

Donor Advised Funds PowerPoint presentation insert

Radio ads, news releases and website content

General audience ads/handouts

Advisor ads/handouts

Web banner ads

Tools for Giving

Ideas for Giving
Part One
portfolio tools
Internal strategy materials

As you integrate Donor Advised Funds tools into those already used by your community foundation, it will be important to align staff and board members with the rationale behind promotion of Donor Advised Funds. These strategy materials, at right, are designed to support your staff and board members with the information they need to accurately and consistently promote Donor Advised Funds and your community foundation.

Use this marketing plan thought-starter to effectively reach key audiences who may be interested in Donor Advised Funds.

File name: DAF1_mrktplan.doc

Your staff members can use this document to help them understand the implications of various community foundation policies related to Donor Advised Funds, as well as answer frequently asked questions.

File name: DAF1_policy.pdf

You can deliver this internal presentation to align your staff with the concepts and rationale behind promoting community foundation Donor Advised Funds.

File name: DAF1_alignment.ppt
Core marketing tools

PowerPoint presentation

The What is a Community Foundation? PowerPoint presentation can help you raise awareness, educate, and inform target audiences about your local community foundation. The presentation begins by defining a community foundation, explaining its unique characteristics, and providing a bit of background. Next, the presentation provides a sample donor story to help viewers understand the benefits of giving through community foundations. You are encouraged to create additional donor stories about people in your community who give through your local community foundation. The presentation concludes by reviewing the top ten reasons people choose to give through community foundations.

This presentation is designed to allow your community foundation to customize some of the slides to better convey your local story. You may wish to shorten this presentation or re-order certain slides depending on your audience. A script is included in the electronic file to help you practice delivering your presentation.

Audiences
- Donors
- Prospects (including community groups)
- Professional advisors

Suggested uses
- Charitable gift discussion support

Intended outcomes
- Educate advisors and donors about types of community foundation products
- Help advisors and donors understand personal, flexible, donor services in a simple way
- Help community foundation staff communicate the value of products clearly and consistently
Core marketing tools

Tools for Giving

These core Tools for Giving materials explain community foundation products and charitable instruments in clear, concise, consistent language. Advisors can be given quantities of these sheets, so they can use one or two specific product sheets with their clients. Prospective donors may receive one or two Tools for Giving sheets along with a personal letter tailored to their particular interests and values for simple—yet specific—communications.

About Our Community Foundation Describes the distinct benefits of your local community foundation.

Charitable Funds Briefly describes Scholarships and Supporting Organizations opportunities for donors to tailor their giving by contribution to an Unrestricted, Field of Interest, Designated, or Donor Advised Fund.

Charitable Instruments Highlights the most common giving methods accepted by community foundations—outright gifts, bequests, remainder trusts, and lead trusts.

Audiences
- Donors
- Prospects (including community groups)
- Professional advisors

Suggested uses
- Charitable gift discussion support
- Mailing, with letter
- Handout for prospective donors

Intended outcomes
- Educate advisors and donors about types of community foundation products
- Help advisors and donors understand personal, flexible, donor services in a simple way
- Help community foundation staff communicate the value of products clearly and consistently

File name: TG1_aboutCF.zip
TG1_aboutCF.pdf (prints two sides)

File name: TG1_CFoverview.zip
TG1_CFoverview.pdf

File name: TG1_CIoverview.zip
TG1_CIoverview.pdf
Donor Advised Funds PowerPoint presentation insert

The Donor Advised Funds PowerPoint presentation is designed for insertion into the What is a Community Foundation? PowerPoint presentation. The Donor Advised Fund presentation contains donor stories, called “People Giving Back,” designed to convey the variety of giving options available through community foundations. A second section, “Working Together for Your Clients,” provides messages appropriate for presentations to professional advisors (not general audiences).

A script is included in the electronic file to help you practice delivering your presentation. Feel free to modify this script to fit your personal presentation style.

See page 19 for instructions on inserting this presentation into the What is a Community Foundation? presentation.

Sample slides from the Donor Advised Funds PowerPoint presentation insert

File name: DAF2_insert.ppt
General audience ads/handouts

These ads are designed to create awareness of the features and benefits of a community foundation Donor Advised Fund and to reinforce your community foundation's relationships with donors, prospects and their professional advisors.

These ads should be customized with your local identity and contact information for use in your promotional efforts as ads in local publications, handouts, or freestanding displays.

File name: DAF301_IfYouTake_GenAd.pdf
DAF301_IfYouTake_GenAd.zip
Photo version a
(prints one side)

File name: DAF302_IfYouTake_GenAd.pdf
DAF302_IfYouTake_GenAd.zip
Photo version b
(prints one side)

File name: DAF303_IfGivingIs_GenAd.pdf
DAF303_IfGivingIs_GenAd.zip
(prints one side)

File name: DAF304_IfYourCo_GenAd.pdf
DAF304_IfYourCo_GenAd.zip
(prints one side)

File name: DAF305_WantToSee_GenAd.pdf
DAF305_WantToSee_GenAd.zip
(prints one side)

Audiences
- Individuals
- Families
- Businesses

Suggested uses
- Ads for placement in local publications
- Freestanding displays or message boards
- Handouts

Intended outcome
- Increase awareness that a community foundation Donor Advised Fund is a powerful, flexible tool for achieving charitable and financial goals
Advisor ad/handout

This ad, available with two photo options, is designed to create awareness of the features and benefits of a community foundation Donor Advised Fund and to reinforce your community foundation’s local relationships with professional advisors.

The ad should be customized with your local identity for use in your promotional efforts as an ad in local professional publications, a handout for advisors, or a freestanding display.

Audience
- Professional advisors

Suggested uses
- Ads for placement in local advisor publications
- Freestanding displays or message boards
- Handouts when meeting with advisors

Intended outcome
- Increase advisor awareness that a community foundation Donor Advised Fund is a powerful, flexible tool for helping clients achieve charitable and financial goals
Web banner ads

Like print ads, these website banner ads are designed to increase awareness of the features and benefits of your community foundation and to reinforce your community foundation’s relationships with donors, prospects and their professional advisors. Most host publications program banner ads to link to your community foundation’s website.

These ads can be used as is (with the “community foundations” logo as a signoff), or can be customized with your local identity. Animated .gif files are provided for immediate use. Layered Adobe Photoshop® (Macintosh) files have also been included if you want to customize them. Your local graphic design resource can convert these layered files into animated .gif files using a downloadable utility such as GifBuilder.

File name: DAF501_IfYouTake_WebAd.gif
Layered PhotoShop file name: DAF501_IfYouTake_WebAd.psd

File name: DAF502_IfYouTake_WebAd.gif
Layered PhotoShop file name: DAF502_IfYouTake_WebAd.psd

*Link these to your website’s home page, or to a special page.

Production note

These .gif files were created at a screen resolution of 72 pixels, and at a size of 468 pixels wide x 60 pixels high—a fairly common size for web banner advertisements.

However, before submitting an electronic file to an online publication, you should always contact the publication to obtain file specifications, which can vary from publication to publication.
Tools for Giving

Tools for Giving are designed to explain Donor Advised Funds offered by community foundations. There are three versions of the Donor Advised Funds tool, varying by intended audience: general/individual, family, and business. There is also a tool on gifts of appreciated stock. Advisors can be given quantities of these sheets so that they can easily discuss Donor Advised Funds with their clients. Prospective donors may receive one or two Tools for Giving sheets along with a personal letter tailored to their particular interests and values for simple, yet specific, communication.

A simple, powerful, and highly personal approach to giving Discusses the Donor Advised Fund, a unique charitable opportunity that provides donors ongoing involvement in suggesting uses for their gift.

Helping your family build a tradition of giving Explains how families can create a legacy of charitable giving and family involvement in community philanthropy through establishing a Donor Advised Fund.

Gaining a higher return on your company's charitable investments Describes how creating a community foundation Donor Advised Fund can be a convenient, flexible way for companies to give back to their community.

Gifts of appreciated stock Explains how appreciated stocks can be used as a gift to a community foundation, including establishing a Donor Advised Fund.

Audiences
- Individuals
- Families
- Businesses

Suggested uses
- Charitable gift discussion support
- Mailing, with letter
- Handout for prospective donors

Intended outcomes
- Help donors and advisors understand how community foundation Donor Advised Funds work
- Help advisors and donors understand personal, flexible donor services in a simple way
- Help community foundation staff communicate the value of products clearly and consistently
Ideas for Giving

Many advisors and prospective donors understand giving opportunities better through stories. Ideas for Giving is a series of donor scenarios that illustrate and personalize the products, services and distinct features of your community foundation. Each Ideas for Giving describes how a Donor Advised Fund was used to achieve the donor’s charitable and financial goals, and explains the personal, charitable, and tax benefits of the gift.

You and your local professional advisors can use one or two stories in conversations with prospective donors to illustrate particular solutions that resemble the donor’s individual needs and circumstances.

- **Connecting to the community** Making a lifelong dream come true.
- **Creating a family tradition** Helping your children experience the joy of giving.
- **Giving back and staying involved** Meeting a variety of personal charitable interests.
- **Helping companies do good things for people** Providing the means to meet community needs.

Audiences
- Individuals
- Families
- Businesses

Suggested uses
- Advisor/client illustrations
- Charitable gift discussion
- Handout or mailing to potential donors with related Tools for Giving sheets

Intended outcomes
- Advisors can simplify complex ideas for clients through examples
- Donors and advisors understand how community foundation Donor Advised Funds work
- Community foundation staff can communicate unique values of community foundations through stories
Radio ads and news releases

Radio ads

These five scripts allow your community foundation to promote Donor Advised Funds over both public and commercial radio.

Before submission to a local radio station, a single script should be selected, based on the emphasis you choose, and customized with your community foundation’s name.

News releases

These three news release templates will allow you to call media attention to the creation of a new Donor Advised Fund by an individual, family, or business.

Audiences
- Media
- Donors
- Prospects

Suggested use
- Promote Donor Advised Funds via far-reaching media

Intended outcomes
- Increase name recognition
- Clearly and succinctly communicate unique features and benefits of community foundation Donor Advised Funds
- Prompt contact with the community foundation

File name: DAF6_RadioAd.doc
File name: DAF6_Release.doc
Website content

This text file provides your existing website the depth of content needed to represent Donor Advised Funds consistently with other materials. An example layout is also included to help you and your web administrator visualize this dynamic medium and incorporate it into your site.

File name: DAF6_webcontent.doc

Helpful hint

Link your banner ad to this section of your website. The content serves as a great "payoff" to the banner ads shown on page 11.
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 QuarkXPress version 6.5 for Macintosh OS. This version of Quark™ is currently the most widely used software program for graphic design and publishing.

Tools designed in Quark are available for your use as Quark files (e.g., DAF8_Giving_Idea.qxd) that are contained online in ZIP files (e.g., DAF8_Giving_Idea.zip) and as PDF files (e.g., DAF8_Giving_Idea.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:** QuarkXPress version 6.5
- **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 2000®, Windows XP®, 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 Adobe Type Manager, a free system software component to display and print these fonts available at http://www.adobe.com/products/atmlight/main.html.
Customizing your tools

It is important that you use tools reflective of your community foundation and customized with local information.

While you may make minor edits to the body content of the tools, you may not change the meaning or intent of the “Ten Reasons” listed on the reverse. This content has been worded carefully by a committee representative of community foundations nationwide and validated nationally and should not be modified in a way that changes meaning or intent. You may use this section in its entirety, or elect not to use it.

You may use this layout as a template for creating your own tools. If you have already designed tools, you may choose to insert content from these tools into your current design. Note that, whether or not you choose to make edits to the content of the tools, you should have your own legal counsel review the content to confirm that content is correct per your particular community foundation’s regulations.

You may change the photos and/or stories used within the tools to reflect demographics in your area or add the value of example local donors, grants, landmarks, etc.
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 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 in the top left slide is a pink box 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.

Definition of a community foundation (Note: you may customize the mission statement, or second paragraph)

“Three Features” section

“Ten Reasons” section

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 the GIF file format for your logo; use the JPEG file format 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?
Customizing your PowerPoint presentations

At right are illustrations of the slides within the What is a Community Foundation? presentation that need to be customized with your local community foundation’s information, identity, and/or statistics. In addition, you may choose to substitute your custom photography for the photography currently included in the presentation.

You may insert slides from the Donor Advised Funds presentation into the What is a Community Foundation? presentation. Open the Donor Advised Funds presentation and go to “Slide Sorter” view. Copy the slides you wish to add. Next, open the What is a Community Foundation? presentation. Move to “Slide Sorter” view and paste the slides into this presentation.

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 photos.

Electronic art files: Use the .gif file format for your logo; use the .jpg file format 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?

Helpful hints

- Insert your foundation logo/positioning statement
- Insert your community name and mission statement
- Insert your foundation history/name
- Insert your statistics/information
- Insert photo/list of board members
- Insert your grant award information and redraw pie chart
- Insert your grant examples
- Section begins — create your own local donor stories in this section
- Insert your logo, positioning statement and address
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.

<table>
<thead>
<tr>
<th>How many do I need?</th>
<th>What is my budget?</th>
<th>How much time will it take to produce?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print at your own office</td>
<td>1–100 copies</td>
<td>$</td>
</tr>
<tr>
<td>Print at copy center</td>
<td>100–500 copies</td>
<td>$$</td>
</tr>
<tr>
<td>Use a local print vendor</td>
<td>500 copies +</td>
<td>$$$</td>
</tr>
<tr>
<td>Distribute online</td>
<td>Unlimited</td>
<td>$</td>
</tr>
</tbody>
</table>

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 QuarkXPress (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.

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project name</td>
<td>____________________________</td>
</tr>
<tr>
<td>Quantity</td>
<td>____________________________</td>
</tr>
<tr>
<td>Number of inks</td>
<td>____________________________</td>
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<td>Number of pages</td>
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<td>Size flat</td>
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<td>Size trimmed</td>
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<tr>
<td>Paper stock(s)</td>
<td>____________________________</td>
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<tr>
<td>Binding</td>
<td>____________________________</td>
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<td>Release date</td>
<td>____________________________</td>
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<tr>
<td>Delivery date</td>
<td>____________________________</td>
</tr>
<tr>
<td>Other</td>
<td>____________________________</td>
</tr>
</tbody>
</table>
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 the Focus on Community reports, 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.
Placing ads

The ads in this portfolio are designed at a trim size of 8.125” wide x 10.875” high. Each ad also can be rendered in a horizontal, half-page format by eliminating the single large photograph that stretches across the top of the full-page version.

Since the trim sizes of magazines and other periodicals vary, the ads must be adjusted to accommodate the particular dimensions of each publication. This type of adjustment can be done by your local graphic design resource; it is also a service offered by many print vendors.

Placing ads: production tips

1. Download and print out the .pdf representing the ad you want to run. This will show the advertising representative how the ad should look. Other issues to discuss with your advertising representative include ad size or dimensions, whether the ad will run as a four-color ad or as a one-color ad, and the cost per insertion of the ad.

2. Send the following items to the publication’s advertising representative:
   - Photocopy of the page illustrating the ad you want to run — include the folder and file names
   - The .zip file containing the ad designed in Quark, along with its art files (for images and graphics)
   - 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 will be typeset by the publication

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. Confirm placement, frequency, and price.
Images in this portfolio are licensed to be used within these tools. However, the photos may not be re-used for other purposes (e.g., in your annual report, on your website, etc.). If you wish to use these photos for any purpose other than as part of the tools distributed in this portfolio, you must purchase them from the licensors (see list at right).

<table>
<thead>
<tr>
<th>Title of Tool</th>
<th>Image #</th>
<th>Image Description</th>
<th>Image Licensor/Image Brand</th>
<th>Licensor Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General audience ads/handouts</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If you take charitable giving personally… (a)</td>
<td>PT0072</td>
<td>family reading book</td>
<td>Getty Images/Photodisc</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
</tr>
<tr>
<td>If you take charitable giving personally… (b)</td>
<td>AA029218</td>
<td>father and child</td>
<td>Getty Images/Photodisc</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
</tr>
<tr>
<td>If giving is one of the family values…</td>
<td>AA032620 R1</td>
<td>family walking on beach</td>
<td>Getty Images/Photodisc</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
</tr>
<tr>
<td>If your company is looking for a better…</td>
<td>AA001510 R1</td>
<td>man in suit talking on phone</td>
<td>Getty Images/Digital Vision</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
</tr>
<tr>
<td>Want to see your stock generate a better return?</td>
<td>AA007857</td>
<td>girl up close</td>
<td>Getty Images/Digital Vision</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
</tr>
<tr>
<td><strong>Advisor audience ads/handouts</strong></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If you have clients who take charitable… (a)</td>
<td>PT0072</td>
<td>family reading book</td>
<td>Getty Images</td>
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<td>If you take charitable giving personally… (a)</td>
<td>LS021066</td>
<td>father and young boy</td>
<td>Getty Images/Photodisc</td>
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<tr>
<td>If you take charitable giving personally… (b)</td>
<td>PTO_001</td>
<td>mother and young daughter</td>
<td>Getty Images/Thinkstock</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
</tr>
<tr>
<td><strong>Tools for Giving</strong></td>
<td></td>
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</tr>
<tr>
<td>DAF (Business)</td>
<td>WFB_043</td>
<td>group of four talking</td>
<td>Getty Images</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
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<tr>
<td>DAF (Family)</td>
<td>AA013220</td>
<td>young girl on swing</td>
<td>Getty Images/Photodisc</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
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<tr>
<td>DAF (General Audience)</td>
<td>AA017034</td>
<td>senior man and young boy</td>
<td>Getty Images/Photodisc</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
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<tr>
<td>Appreciated Stock</td>
<td>AA007857</td>
<td>two young children</td>
<td>Getty Images/Photodisc</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
</tr>
<tr>
<td><strong>Ideas for Giving</strong></td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Connecting to the community</td>
<td>AA029162</td>
<td>senior couple dancing</td>
<td>Getty Images/Photodisc</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
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<tr>
<td>Creating a family tradition</td>
<td>AA005295</td>
<td>couple standing on beach</td>
<td>PictureQuest/Stockbyte</td>
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<tr>
<td>Creating a family tradition</td>
<td>EED_013</td>
<td>girl playing violin</td>
<td>PictureQuest/Stockbyte</td>
<td><a href="http://www.picturequest.com">www.picturequest.com</a></td>
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<tr>
<td>Giving back and staying involved</td>
<td>AA066035</td>
<td>man and boy</td>
<td>Getty Images/Thinkstock</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
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<tr>
<td>Giving back and staying involved</td>
<td>AA031092</td>
<td>baseball team on bench</td>
<td>Getty Images/Thinkstock</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
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<tr>
<td>Helping companies do good things for people</td>
<td>AA001510</td>
<td>man in suit talking on phone</td>
<td>Getty Images/Thinkstock</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
</tr>
<tr>
<td>Helping companies do good things for people</td>
<td>AA038434</td>
<td>happy kids on hill holding hands</td>
<td>Getty Images/Thinkstock</td>
<td><a href="http://www.gettyimages.com">www.gettyimages.com</a></td>
</tr>
</tbody>
</table>
Using rights-protected images

Photographs released in this portfolio are all royalty-free images, purchased for use solely in conjunction with the layouts and materials provided in this portfolio. They may not be shared, copied, resized, manipulated or redistributed for any other purposes.

In every file, you have the choice to either use the supplied images or replace them with images of your own. At no time are you allowed to employ the images of one file in another independent file. License for these images is limited to those layouts in which they are supplied. Neither NMAT nor its partners will be responsible for failure to adhere to these licensing restrictions.
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.

<table>
<thead>
<tr>
<th>1. Your community foundation name (for follow-up purposes):</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

| 2. Overall, how well is the Portfolio working for your community foundation? |
| 5 4 3 2 1 |
| (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. Were the following tools effective with the audiences listed in the matrix below? |
| (Check all that apply.) |

<table>
<thead>
<tr>
<th>PowerPoint presentations</th>
<th>Ads/handouts</th>
<th>Donor Advised Funds tools</th>
<th>Core marketing tools</th>
</tr>
</thead>
<tbody>
<tr>
<td>□□□□</td>
<td>□□□□</td>
<td>□□□□</td>
<td>□□□□</td>
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</tbody>
</table>

| 8. Please rate the overall usefulness of the internal strategy materials: |
|                                                                                       |
The National Marketing Action Team (NMAT) is a joint effort of the Community Foundations Leadership Team of the Council on Foundations ("the Council" or "COF") and Community Foundations of America (CFA). NMAT is charged with providing strategic leadership to increase and strengthen the national and local presence of community foundations by identifying key target audiences and implementing effective communications strategies, activities, and programs.