A Guide to Using Community Foundation Tools

community foundation

PORTFOLIO

MARKET READINESS

Release 2.0

National Marketing Action Team
a Council on Foundations & Community Foundations of America collaboration
promoting community foundations
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Layout software
Some tools in this portfolio have been created in QuarkXPress™ version 6.5 for Macintosh® OS 10, an industry-leading software program for design and layout. 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.

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Portfolio at a glance

**Internal capacity development communications**

"Why Marketing?" PowerPoint presentation

**Professional advisor strategy materials**

Marketing plan  Resource catalog  Internal alignment presentation  Advisor questionnaire  Database tool

**Donor Advised Funds strategy materials**

Marketing plan  Policy considerations  Internal alignment presentation

**Research and development briefs**

- Family Philanthropy
- High Net Worth Individuals
- Women and Philanthropy

**Core marketing tools**

- Community foundation message points
- "What is a Community Foundation?" PowerPoint presentation
- About Our Community Foundation
- Charitable Funds Overview
- Charitable Instruments Overview

**National standards information**

- Council on Foundations’ standards overview
- Council on Foundations’ standards
Part One
internal capacity development communications
Community foundations market themselves every day (whether they realize it or not) as they talk to donors, potential donors, businesses, the community-at-large, community advocates, nonprofit organizations, and media representatives. Each of these groups is a separate and distinct audience.

Marketing is about understanding. It can be described simply as helping audiences better understand you, and you better understand your audiences. You can understand each audience better by knowing who they are (demographics), what they think, what they want, and how they perceive you.

This presentation can be used with board and staff members to introduce marketing and explain why it is important for community foundations to invest in it today. The presentation includes a script to help presenters prepare to deliver it.

File name: MR1_whymkt.ppt
Professional advisor strategy materials

These materials are designed to help your community foundation prepare for outreach to professional advisors.

**Marketing plan**

This strategic marketing plan offers step-by-step assistance in targeting professional advisors, developing relationships with them, tracking information and measuring success.

**Internal alignment presentation**

This presentation, called *Introducing the Professional Advisor Program to Your Board and Staff*, is designed to explain the value of developing partnerships with professional advisors to members of your community foundation’s board and staff. It provides team leaders a tool to communicate the basic information they need to embark on professional advisor outreach and use their individual roles to advance this common goal.

**Professional advisor questionnaire**

This document can be used with advisor contacts to gauge their current understanding and involvement with charitable giving and community foundations.

**Database tool**

This database-starter, called *Measures of Success*, contains an advisor profile template and a valuation spreadsheet. This tool assists community foundation staff in documenting professional advisor relationships and tracking client and advisor referrals.

**Resource catalog**

This document is a guide to references and best practices within the community foundation field that help community foundations build relationships with the professional advisor audience.
Donor Advised Funds strategy materials

These strategy materials 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
Research and development briefs

The development of “customer-focused” products and services requires objective research of high-potential audiences. These briefs include research information, community foundation marketing implications, and strategies for community foundation staff to use as they target three key audiences.

**Women and Philanthropy**

This paper draws upon a wide array of research publications to summarize information available on women and their giving habits, and to make suggestions for bringing them into the fold of philanthropy through the field of community foundations.

File name: MR2_womenbrief.pdf

**Family Philanthropy and the Intergenerational Transfer of Wealth**

This research paper addresses the scope and characteristics of family philanthropy today, and suggests methods community foundations can use to increase their appeal to today’s most important audience in philanthropy.

File name: MR2_fambrief.pdf

**High Net Worth Individuals Giving Back to Community**

This research paper draws upon research conducted by HNW, Inc., a company providing solutions exclusively focused on the affluent market. The paper outlines common characteristics and values of high net worth individuals, identifies various segments within this broad audience population, outlines ways community foundations can reach this audience, and offers additional resources on this growing, and increasingly diverse population.

File name: MR2_hnwbrief.pdf
Part Two

Core Marketing Messages and Tools
Community foundation message points

The message points at right were developed by the Community Foundation National Marketing Action Team. Pages 11–12 provide the rationale behind these key community foundation messages and explain how community foundations can apply these messages in their communications to create a clear understanding of what a community foundation is and how it serves donors and the community. In order to help community foundations communicate consistently nationwide, a framework on page 13 details the extent to which the messages can be customized.

What is a community foundation?
A community foundation is a tax-exempt public charity created by and for the people in a local area. It enables people with philanthropic interests to easily and effectively support the issues they care about—immediately, or through their will. Donors can establish a charitable fund at the foundation by contributing a variety of assets and may also recommend grants—in their name, if they choose—to nonprofit groups they want to support.

Key value statements

1. Personalized service: Community foundations help individuals, families, businesses, and nonprofit agencies achieve their charitable and financial goals by providing tools and resources that make giving easy, flexible, and effective.
   • Donors can create a charitable fund and recommend grants that support the issues and groups they care about—such as the arts, education, the environment, and healthcare—even if these groups are located outside of their local community. Or donors can rely on the foundation to make grants that reflect their particular interests.
   • We are an attractive alternative to starting a private foundation, since we handle all record keeping, reporting to the IRS, accounting, and investment management.
   • Donors who establish a fund at a community foundation benefit from the highest available tax deductions for charitable contributions.
   • Donors can establish a variety of funds, depending on their financial and charitable goals. Some approaches focus on giving in the near-term, while others enable donors to make giving a part of their estate planning strategy.
   • Donors have opportunities to be involved in the grantmaking process, including recommending grant recipients.
   • Donors can create a charitable fund and recommend grants that support the issues and groups they care about—such as the arts, education, the environment, and healthcare—even if these groups are located outside of their local community. Or donors can rely on the foundation to make grants that reflect their particular interests.

2. Local expertise: Community foundations have an in-depth understanding of the community’s challenges and the groups and individuals addressing them.
   • We closely monitor community issues, opportunities, and resources.
   • Our knowledge of the community enables us to make a difference by funding high-impact initiatives addressing a broad range of local needs.
   • Our expertise helps donors learn more about local issues in order to make their giving as effective as possible.

3. Community leadership:
Community foundations play a key role in addressing community needs, now and in the future.
   • We serve as community catalysts, convening diverse voices and groups to work on solutions to local issues.
   • We build endowments to ensure that grants are always available to support the community.
   • We are governed by leaders with strong ties to our communities.
   • We foster greater giving and volunteering in our community.
   • We are governed by leaders with strong ties to their communities.
Using message points

Using a reliable, effective set of messages consistently and repeatedly will help you reach out to current and potential donors and their professional advisors—as well as the community at large. The messages can be incorporated into virtually every communications activity you undertake—in printed materials, on your website, in media outreach, in presentations and conversations, and in other outreach efforts. More specifically, the use of consistent messages can:

• Enable those hearing or reading about you to more easily tell your story to others and more easily remember key aspects of how you serve donors and your community

• Help reporters and others focus on your agenda, rather than on points that detract from conveying what’s most important to you and your foundation

• Allow your staff and board to speak with a shared voice

• Help establish a common language and way of describing the value of community foundations—not just in your local community, but regionally and nationally

Overview

NMAT has developed the new community foundation message points with four primary goals:

• To identify and articulate the primary value of a community foundation to various audiences.

• To establish key messages that can be used consistently by community foundations around the country in order to establish a strong brand identification for the field—locally, regionally, and nationally.

• To serve as the underlying themes of all nationally produced and distributed materials (including the NMAT materials now available).

• To help distinguish community foundations from other entities that offer competitive products and services.

The message points reflect those already being used by Community Foundations of America, the Council on Foundations, the Midwest Community Foundations’ Ventures, and the League of California Community Foundations Statewide Visibility Program—as well as individual foundations involved in these and other outreach efforts.
Using message points

The national community foundation message points can be used in a variety of settings. These include:

1. **Printed materials/websites:** You can incorporate them in your outreach materials for new donors and financial advisors, grant guidelines, general introductory pieces on your foundation, annual reports, newsletters, and websites. Not every piece or every article needs to contain all the message points, but the messages can infuse your materials by selecting quotes, examples, and success stories that reflect and reinforce the message points.

2. **Media interviews:** You should always begin an interview with the goal of stating key message points appropriate to the subject—regardless of what questions you are asked. Many reporters have little or no understanding of community foundations, and what they do know about philanthropy often focuses on our competition. Besides finding an opportunity to state the message points, be ready to provide compelling examples of how these relate to your foundation in order to make the messages “come alive.” Media training can help you learn how to incorporate key messages in interview situations.

3. **Presentations:** Whenever a foundation staff or board member speaks in your community, it is an ideal opportunity to convey the value of community foundations by using the message points—again, with examples and sub-points. They should be key ingredients of presentations to professional advisors, community groups, and attendees of events such as estate planning seminars.

4. **Conversations and other one-on-one interactions:** The message points (and definition of a community foundation) are ideal for the classic “elevator” conversation, when you have a small amount of time to clearly convey what your foundation does and what differentiates it from other charitable institutions.

5. **Mission statements:** While foundations do not routinely change their mission statements, expressions of your overarching goals and values are another opportunity to incorporate the community foundation message points.
How much flexibility is there in using the message points?

These message points were developed to apply broadly to community foundations of all sizes and reflect a range of policies around such issues as geographic scope and endowment-building—while presenting a compelling case for our field as a whole.

NMAT recommends limited or no changes when using the key value statements (in bold on page 10). These state the three primary differentiating characteristics of community foundations, and serve as the platform for all other messages.

It is important to remember that these key value statements will be used consistently in all nationally produced materials, so the more each foundation uses them, the more likely it is that we can collectively create a clear understanding of what a community foundation is and how it serves donors and the community.

The more your messages reflect the national messaging, the more you will be able to leverage and benefit from national marketing activities. The use of these messages at all levels can help create a clear understanding of what a community foundation is and how it serves donors and the community.

Not all the message points need to be used in the same publication or presentation. Given the audience you’re trying to reach, or situation in which someone is speaking, certain message points may be more appropriate to emphasize than others. The order of the points can also be changed, depending on the setting in which they are used.

The sub-points (with the bullets) are meant to be customized to meet the particular needs of your foundation. So if, for example, your foundation does not emphasize the building of an endowment, the “permanence” message could be modified to meet your needs. Or if you limit grantmaking to a specific geographic area, the message that pertains to that issue can be modified. The order of the sub-points can also be altered to meet the needs of a particular communication effort.

One of the most important components of promotion is being able to deliver on the promises you communicate. As you explain the value of your community foundation with these messages, make sure you explain them in a way that reflects the true capabilities of your community foundation.
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
- Local community associations and service clubs
- Donors
- Prospects
- Community foundation volunteers

Suggested uses
- Speaker support
  - Custom PowerPoint presentation
  - Printed version
- Discussion support

Intended outcome
- Audience will desire more information (place on mailing list, personal meeting, volunteer opportunities)
- Audience will gain greater understanding of your community foundation; ways your community foundation helps donors fulfill multiple charitable intents; the value of community foundations
Core marketing tools

**Tools for Giving**

Three core tools from the *Tools for Giving* series explain community foundation features and products in clear, concise, consistent language.

- **About Our Community Foundation**: This overview tool, which must be customized locally, describes facts and distinct benefits of your community foundation.

- **Charitable Funds**: Briefly describes opportunities for donors to tailor their giving by contribution to an Unrestricted, Field of Interest, Designated, Scholarship, Supporting Organization or Donor Advised Fund.

- **Charitable Instruments**: Highlights the most common giving methods accepted by community foundations—outright gifts, bequests, remainder trusts, Charitable Gift Annuities, 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 (prints one side)

File name: TG1_CIoverview.zip
TG1_CIoverview.pdf (prints one side)
Part Three

customizing and producing tools
Editing PowerPoint presentations

It is important that you deliver a presentation reflective of your community foundation and customized with local information and images.

While you may make minor edits to the entire presentation, there are certain sections that have been worded carefully by a committee representative of community foundations nationwide and validated nationally—these sections should not be modified in a way that changes meaning or intent. You may use these sections in their entirety, or elect not to use them in your presentation.

If you have already designed a PowerPoint presentation, you may choose to insert content from this presentation into your current design.

Slides in the *What is a Community Foundation?* presentation featuring content that must remain intact in intent and meaning.

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

A community foundation has three special features.

"Three Features" section

"Ten Reasons" section
Customizing 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 stock photography in the presentation.

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 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 back-up plan in case of a technology glitch?
Customizing PowerPoint presentations

**Personalize the presentation with local facts and pictures.** Show pictures of your board and local examples of grants. Try to show images of people that might be recognized by your audience.

**Understand your audience.** When planning for a presentation, try to find out in advance who will be in the audience and what their interests are. Then, tailor the presentation appropriately (e.g., if your audience is family oriented, discuss the ability to set up a fund and involve their children in recommending grants).

**Build a donor story database.** In addition to customizing the slides with your local identity and information, document a series of local donor stories. Then pick the two or three stories most relevant to the audience.

**Determine meeting logistics in advance.**
- Find out in advance the room size and setup, and to approximately how many people you will be presenting. Is the room big enough for the audience? Can seating be arranged differently to better engage the audience?
- Find out how much time you will be given to make the presentation. If you only have 15 minutes, then present only a few slides that will be most relevant to the audience. Stick to the time allotted... it shows you are sensitive and respectful to the audience’s needs, and they may give you permission to extend the timeframe if they are interested in learning more.

**Leave time for discussion and questions.** There is usually abundant information to share about your community foundation, but always leave time for audience discussion and questions. It keeps your audience engaged, shows that you’re interested in meeting their specific needs, and can help identify opportunities for follow-up with people who want more information. Be sure everyone in your audience understands how and where they can get more information. After the presentation, try to get feedback and engage in conversation with a few of the audience members, and have next steps in mind.

**Plan your technology needs and resources.**
- Will you present using an LCD projector or will you present from paper handouts?
- If applicable, always identify and test the computer you will be using before you get to the presentation site.
- If you make edits to the presentation on a computer different from the one you will be using for the presentation, know how you will save and transfer the PowerPoint file to another computer (the file size is too large to save to a regular floppy disk).
- Have a backup plan in case technology fails (e.g., use paper handouts).

**Capture names and contact information.** Create a sign-in sheet or collect business cards to keep track of people to whom you’ve presented and to build your database. Be sure to capture any key learnings or interests identified by an individual.

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

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

Tools in the portfolio have been created in Microsoft Word for Windows®, Microsoft PowerPoint for Windows, and QuarkXPress version 4.11 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., PA1_resource.qxd) that are contained online in ZIP files (e.g., PA1_resource.zip) and as PDF files (e.g., PA1_resource.pdf). You can view and print the PDF files using Acrobat Reader.

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

- **software:** QuarkXPress version 4.11
- **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](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](http://www.adobe.com/products/atmlight/main.html).

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.

Please note: 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.
Customizing your tools

Considerations for producing your tools

There are several options for producing print materials to meet your local needs and budget. You can print the tools at your office (laserjet or inkjet printer, copy machine) or use a local print vendor (lithographic/digital printer or copy center) to help you produce them.

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>Print production options: making the right choice</th>
<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>
<td>One day (usually black and white)</td>
</tr>
<tr>
<td>Print at copy center</td>
<td>100–500 copies</td>
<td>$$</td>
<td>A few days</td>
</tr>
<tr>
<td>Use a local print vendor</td>
<td>500 copies +</td>
<td>$$$</td>
<td>One to two weeks</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 a laser 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. However, it's a good idea to match printing methods and paper on all tools whenever possible for a consistent appearance.
Printing files 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.

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.
Printing files at your 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. 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 ads and tools are PostScript Type 1 Font Format Minion and News Gothic. 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.
Print quote request form

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>Project name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
<td></td>
</tr>
<tr>
<td>Number of inks</td>
<td></td>
</tr>
<tr>
<td>Number of pages</td>
<td></td>
</tr>
<tr>
<td>Size flat</td>
<td></td>
</tr>
<tr>
<td>Size trimmed</td>
<td></td>
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<tr>
<td>Paper stock(s)</td>
<td></td>
</tr>
<tr>
<td>Binding</td>
<td></td>
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<tr>
<td>Release date</td>
<td></td>
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<tr>
<td>Delivery date</td>
<td></td>
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<tr>
<td>Other</td>
<td></td>
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</tbody>
</table>
Part Four
National Standards Information
National Standards information

These documents outline the *National Standards for U.S. Community Foundations* (as approved by the Community Foundations Leadership Team of the Council on Foundations) and describe the importance of standards as well as the process community foundations must complete in order to comply with these standards.

File name: MR4_WhyStandards.doc

File name: MR4_Standards.doc
Portfolio evaluation
feedback form
Feedback form

Please use the form below to help us evaluate the Portfolio. 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.

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

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

   Very well 5  Somewhat well 4  Not at all well 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>What is a Community Foundation? presentation</th>
<th>Staff/volunteer training</th>
<th>Potential donors</th>
<th>Current donors</th>
<th>Professional advisors</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Core messages</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>About Our Community Foundation</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Charitable Funds Overview</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Charitable Instruments Overview</td>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

8. Please rate the overall usefulness of each internal tool:

<table>
<thead>
<tr>
<th>Why Marketing? presentation</th>
<th>Very useful</th>
<th>Somewhat useful</th>
<th>Not at all useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Advisor strategy materials</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Donor Advised Funds strategy materials</td>
<td></td>
<td></td>
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<tr>
<td>Research and development briefs</td>
<td></td>
<td></td>
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<tr>
<td>Standards information</td>
<td></td>
<td></td>
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<tr>
<td>Core marketing tools</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FAXBACK INFORMATION
Community Foundation Services
Council on Foundations
fax (202) 835.2732  e-mail nmat@cof.org
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.

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