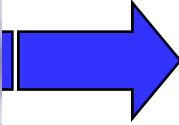


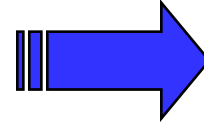


The Donors

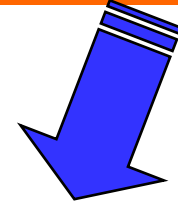


Assets

- Cash
- Public Stock
- Mutual Funds
- Real Estate
- Private Stock
- Limited Partnerships, LLCs
- Weird Stuff



Community Foundation of the Ozarks



Fund Types

DONOR ADVISED

- Multiple grants to multiple local or national charities
- Multiple generations

DESIGNATED

Endowed grants to specific charity or charities

SCHOLARSHIP

Grants to specific school's scholarship program or grant to scholarship program not assigned with school

COMMUNITY GRANTMAKING

- Highly competitive grant process for local charities
- Volunteers determine most pressing community needs

FIELD-OF-INTEREST

Similar to an unrestricted fund though it is defined by a specific grant focus area (environment, health, children, etc.)

ORG ENDOWMENT Nonprofit creates an endowment fund to protect the funds from future boards and/or for investment services

Benefits

- Permanence
- Anonymity
- Stewardship
- No set-up costs
- Maximum tax advantages
- Ease of use
- Local knowledge
- Investment process
- No pay-out requirement

Board Engagement on Steroids

Recommendations:

1. Set Expectations and Create Accountability

2. Create Actions Any Board Member Can Select –

Hosting One “Widening the Circle” Prospect Event – 5 hours

Inviting an ideal prospect to lunch or to a prospect event – 1 hour

Setting up a targeted civic club or association speech – 1 hour

Co-presenting a talk about the Foundation – 1 hour

Introducing staff to each one of his/her professional advisors – 1 hour

Personal call to welcome new donors to CF – 3 calls for 1 hour

Ask for 3-5 Hours/Year for Development and Donor Services

Commit to 100% personal giving and/or planned gift for a fund or any CF initiative.