



Heartland
COMMUNITY FOUNDATION
An Affiliate of the Greater Salina Community Foundation

GUIDE TO YOUR *Endowment* FUND

ACCESS
THIS KIT
ONLINE



HCF Fundholder Toolkit

www.HeartlandCommunityFoundation.org/fundholders



Heartland
COMMUNITY FOUNDATION
An Affiliate of the Greater Salina Community Foundation

Dear fundholder,

We are delighted to introduce the Heartland Community Foundation Fundholder Toolkit – your comprehensive resource for maximizing the impact of your philanthropic journey with us. Whether you are a long-standing member of our community or new to the Heartland family, this toolkit is designed to serve as a valuable reference guide. Inside, you will find essential information about our services, the types of gifts we accept, accessing the donor portal, grant opportunities, strategies to grow your endowment fund through planned giving, and more.

For our esteemed longtime fundholders, this kit brings new insights and opportunities to enhance your philanthropic endeavors. To our new fundholders, welcome aboard, and thank you for choosing Heartland Community Foundation as your partner in giving.

Together, we can continue to make a positive and lasting difference in our community.

Please feel free to reach out at 785-639-2629 or sarahmeitner@gscf.org. if you have any questions or need further assistance. We look forward to supporting your philanthropic vision and working hand in hand to create a brighter future for the Heartland communities.

Warm regards,

Sarah Meitner
Executive Director

Enclosure: Heartland Community Foundation Fundholder Toolkit

GUIDE TO YOUR *Endowment* FUND

1	YOUR PARTNER IN PHILANTHROPY	<ul style="list-style-type: none"> About Heartland Community Foundation How Does an Endowment Work? Quick Fundholder FAQs Fundholder Role
2	GIVING MADE GREATER	<ul style="list-style-type: none"> What is an Organization Fund? Other Types of Funds Available HCF Local Impact HCF Staff and Advisory Board Members
3	10 WAYS TO GROW YOUR FUND	<ul style="list-style-type: none"> 10 Ways to Grow Your Endowment Fund at the Community Foundation
4	WORKING TOGETHER FOR GOOD	<ul style="list-style-type: none"> HCF Commitment to Fundholders HCF Services Benefits of an Endowment
5	BUILD DONOR RELATIONSHIPS	<ul style="list-style-type: none"> Ways to Donate to Your Fund Tips to Promote Your Fund Ask HCF for Help
6	COMPLEX GIFT SUPPORT	<ul style="list-style-type: none"> Types of Non-Cash Gifts We Accept Types of Gifts We Don't Accept Tips to Convert Non-Cash Assets Into Charitable Gifts
7	UTILIZE PLANNED GIVING	<ul style="list-style-type: none"> What is Planned Giving? Development Strategy Takes Planning HCF Planned Giving Partnership Tips to Get Started
8	PROMOTE YOUR ENDOWMENT	<ul style="list-style-type: none"> Sample Text to Promote Your Fund Tips to Use Social Media Links to Additional Resources
9	ACCESSING THE DONOR PORTAL	<ul style="list-style-type: none"> Accessing the Donor Portal Using the Donor Portal Recommending Grants from a Fund
10	GRANT OPPORTUNITIES	<ul style="list-style-type: none"> HCF Grant Opportunities and Deadlines Grant Guidelines for Applicants How are Grants Evaluated? Contact Information
11	GIVE FEST GIVING DAY	<ul style="list-style-type: none"> What is Give Fest? Give Fest Eligibility Guidelines

NONPROFIT FUNDHOLDER TOOLKIT

YOUR PARTNER IN PHILANTHROPY

The **Heartland Community Foundation** supports area nonprofits in realizing their mission and strengthening the individuals and communities they serve.



At the **Heartland Community Foundation**, we are passionate about fostering generosity, cultivating a legacy of giving, and inspiring love of community in Ellis, Rooks, and Trego counties. We truly have the power to make an impact for generations.

We work with donors and professional advisors to facilitate charitable giving through permanent funds (now or at end of life) that provide annual income to charities and funding for important causes, projects, and programs.

Our goal is to continue growing the Foundation, connecting donors to causes, and increasing capacity so we can grant even more.

HOW DOES IT WORK?



GIVE

Donors make a gift to any new or existing fund at HCF, during their lifetime or as part of their estate.



GROW

We grow the fund by investing the monies for long-term growth.



GRANT

HCF distributes grants from our unrestricted funds; from organization and designated funds; and on behalf of donors to the causes they've selected, forever.

ABOUT HEARTLAND CF

- The Heartland Community Foundation serves communities in Ellis, Rooks, and Trego Counties.
- Established in 2007 by 47 founding donors with an administrative endowment, now \$1.8M.
- Affiliate foundation of the Greater Salina Community Foundation with 11 fellow affiliates.
- \$8.1M in total assets; includes management of the endowed funds of more than 40 local groups.
- \$3.6M awarded in grants and scholarships to nonprofit organizations since inception; about \$400,000 annually.

QUICK FUNDHOLDER FAQs

- Fundholders can access the full list of fund guidelines, their annual and quarterly fund statements, and their real-time fund balance on the HCF Donor Portal at www.heartlandcommunityfoundation.org.
- Your fund's spendable is calculated each August, based on the total fund size of the average 16 quarters prior. Each fund must be at least 1 year old before the spendable can be taken.
- The FY24 spendable is 5%.
- Administrative fees are assessed on each fund at 1% of total fund size or a minimum of \$250/year. Funds \$1 million+ are assessed reduced fees on a sliding scale.

FUNDHOLDER ROLE

- Growing your endowment fund is important to reach long-term goals; let us know how we can help.
- Communicate with HCF staff when you have questions about your fund, fund statements, grantmaking, other resources, or strengthening your fundraising plan.
- Reach out when you need help accepting and processing complex or non-cash gifts.
- Promote your endowment fund to donors and stakeholders and include capacity growth as part of your annual fundraising goals.
- Don't forget to include estate planning and legacy giving in your discussions with donors.

GIVING MADE GREATER

Your organization endowment is called an **Organization Fund**, but there are six primary fund types available at the **Heartland Community Foundation**. Discover our charitable fund options and choose the fund that's right for you or your donors. Together, we can create a legacy of generosity and strengthen our community.



Field of Interest

Focus your gift on an important area of community life — such as education, health, arts, or environment. You identify your personal interest or passion when making the gift. HCF awards grants to organizations and programs that are making a difference in the area you select.



Designated

Direct your charitable gift to benefit a specific nonprofit organization or purpose. Your gift can provide an ongoing funding stream for a senior center, museum, service provider, or virtually any nonprofit charitable organization, in the area you select.



Donor Advised

Enjoy ongoing involvement with a Donor Advised Fund. Make grants from your fund to any nonprofit organization that supports the causes that matter most to you, including your church or alma mater. Distributions are given in the name of your fund.



Organization

Nonprofits can create permanent endowment funds for their own benefit and receive assistance accepting non-cash or complex gifts. HCF handles all of the administrative and investment responsibilities, freeing the organization to pursue its mission.



Unrestricted

Your gift is highly flexible and available to meet the breadth of community needs — including future needs not yet known. Unrestricted gifts empower Community Foundation staff to make strategic grants, where need and opportunity are greatest.

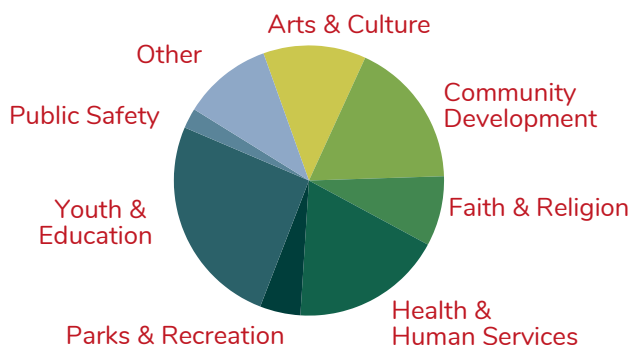


Scholarships

Invest in your community's future by establishing a scholarship in your name or in honor of a loved one. You determine the criteria students must meet to receive the scholarship. With your help, students can realize their academic and career goals.

LOCAL IMPACT

- HCF houses **\$1M+** in **permanent funds for 40+ local nonprofits**
- Distribute grants from our unrestricted impact funds twice per year, in the fall (applications due Nov. 15) and in the spring (due May 15).
- Host Youth Action Council and Tiger Action Council, young-adult leadership and engagement program.
- Participate in community needs initiatives.
- In FY23, HCF granted \$391,332 to Ellis, Rooks, and Trego County nonprofits, representing these causes:



HCF ADVISORY BOARD

Sarah Meitner, Executive Director, sarahmeitner@gscf.org

ELLIS

Michael Baxter
Joslyn Brungardt
Katie Dorzweiler, Secretary, Grants Co-Chair
Josh Dreher, Vice President
Joleen Fisher
Jude Fox, Treasurer
Sandy Jacobs, Board Emeritus
Nikki Pfannenstiel, Board Emeritus

ROOKS

Kelli Hansen, President, Grants Co-Chair
Kayla Hilbrink
Donna Hudson-Hamilton
Tammy McClellan
Mari Tucker
Kathy Ramsay, Board Emeritus

TREGO

Sara Brown
Trey Moeder
Cristi Werth
Hardy Howard, Board Emeritus

PLEASE REACH OUT IF YOU HAVE QUESTIONS: 785-621-4090 OR HEARTLAND@GSCF.ORG



Heartland
COMMUNITY FOUNDATION
An Affiliate of the Greater Salina Community Foundation

10 WAYS TO GROW YOUR *Endowment* FUND

AT THE COMMUNITY
FOUNDATION

Use the Community Foundation as your Planned Giving office. With expertise in all areas of fund development, investments and estate planning, we are here to support our nonprofit partners in creating a sustainable funding source.

Host our staff for an Endowment 101 training for your board and staff. The more you know the easier it is to spot a potential planned giving donor and begin that delicate conversation.

Take advantage of estate attorney John Griffin, who provides **FREE** stewardship counseling and estate planning advice to donors who want to leave an estate gift to a charitable organization in NW Kansas. Call HCF to schedule a visit.

Encourage donors to make contributions to your endowment fund in honor of or in memory of loved ones. Or to name the endowed fund as a beneficiary on a life insurance policy.

Establish a donor recognition society for endowed fund contributors or planned giving donors, providing special benefits or privileges to loyal supporters.

Mention "Have you left our organization a gift in your Will?" in every communication, e.g. website, newsletters, annual report, brochures, letterhead, email signature, etc.

Take advantage of the Community Foundation's offer to print 100 color copies of your fund brochure annually. Display or distribute copies in your office, at special events, open houses and board meetings. Call for more info.

Have one special event each year dedicated to raising money exclusively for the endowment fund or to thank endowed fund contributors.

Remind donors that they can utilize gifts from retirement funds (IRA). If they are age 70½, they can donate up to \$100,000 per person to public charities without having to count the distributions as taxable income.

Provide the link to the endowment fund on your website, emails, social media. Forward the link for your Fund to board members, staff, and donors.

PLEASE REACH OUT IF YOU HAVE QUESTIONS: 785-621-4090 OR HEARTLAND@GSCF.ORG

GROW YOUR LEGACY

An endowed fund at the **Heartland Community Foundation** provides a stable and predictable source of funding for your nonprofit's mission and programs

Together, we can do more

Supporting local nonprofits that are making a difference is at the heart of what we do. The **Heartland Community Foundation** serves nonprofit organizations through grants, endowments, reserve funds, initiatives, and more. We create connections and inspire giving that invests in the powerful work you do for our community and helps ensure long-term success and sustainability. Let's build a more vibrant future together!

Benefits of Endowed Funds



Creates an ongoing source of income.



Enhances stability and credibility.



Relieves pressure on the annual operating fund.



Allows for program or capacity expansion.



Offers independence from third-party funders.



Provides flexibility for management.



Builds pipeline to easily accept future gifts.



Encourages outright gifts.

HCF COMMITMENT

The Heartland Community Foundation is committed to stewarding your funds to accomplish your goals. We pledge to:

- Maintain an excellent investment program;
- Provide clear, accurate information about your fund;
- Respond promptly to your inquiries;
- Understand the emerging needs and opportunities of Heartland-area communities;
- Engage new generations of philanthropists;
- Help you fulfill your charitable objectives.

SERVICES PROVIDED

Professional Investment Management

Fund assets are placed into an investment pool at the HCF to grow and preserve the principle in perpetuity.

Increased Organization Visibility

Nonprofit fundholders are featured on our website and in promotional materials, joining a larger giving community. Donors have the opportunity to support your organization.

Reduced Nonprofit Administration Resources

HCF processes all gift acknowledgements and provides your organization with quarterly statements of fund activity. There is no burden to your organization staff to process gifts, acknowledgements, tax receipts, or reporting.

More Giving Options for Your Donors

HCF accepts a variety of gifts, including cash, real estate, stocks, grain, retirement funds, and more. This allows your organization to receive complex gifts that otherwise may be time consuming to process. All funds are also included on the HCF website to easily receive online contributions.

Planned Giving Services

HCF administers charitable gifts through planned giving, which can include direct gifts to organization or their endowment funds. HCF works with donors and their professional advisors to answer gift planning inquiries.

Fundraising Support and Consultation

Let us know how we can help you achieve your fundraising goals, from plan inception and annual capacity growth to capital campaigns and identifying other funding partners.

BUILD DONOR RELATIONSHIPS

Let us help!

We want to support your efforts. Call us for:

- Planned giving support
- Examples of fundraising letters or other materials
- Help with language for your social posts
- Informational brochure about your endowment
- Questions about types of gifts

HOW CAN PEOPLE DONATE TO MY FUND?

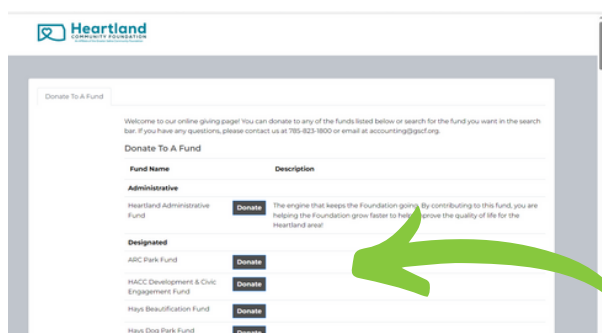
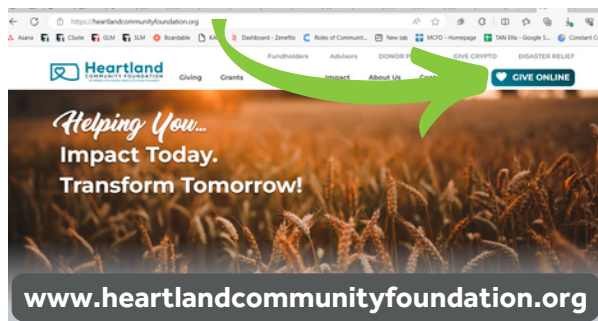
Cash gifts can be made online or mailed to the Heartland Community Foundation.

@ ONLINE: www.heartlandcommunityfoundation.org and click **GIVE ONLINE** to see a full list of fund names. All online gifts receive a receipt. If there are any additional notes, or if the gift is in honor or memory of another individual, please note it in space provided.

✉ MAIL: Make gifts payable to "Heartland Community Foundation" and clearly note the name of the receiving fund in the memo line or in the accompanying documentation. Mail to Heartland Community Foundation, PO Box 1673, Hays, KS 67601. All donations will receive an acknowledgement letter/receipt from HCF.

👤 IN PERSON: Bring your gift to the HCF office at 1200 Main St., #102, in Hays; call 785-621-4090 or email heartland@gscf.org to make other arrangements.

Click the Give Online button



Scroll to find the fund name

TIPS TO PROMOTE YOUR FUND

Communicate with your donors about your organization endowment.



Include information about your endowment fund in your promotional materials



Create materials about your endowment's needs that can be left with donors



Strengthen donor relationships, keeping them informed about your work



Link to your fund's online giving platform on your organization website



Share compelling stories of impact achieved through the endowed fund



Utilize planned giving to grow your endowment and talk to donors about estate gifts



Promote your fund on your social media channels as part of your regular content



Recognize donors who contribute to the endowed fund with a special recognition



Send out an annual letter to donors asking for gifts to the endowment.

COMPLEX GIFT SUPPORT

Types of gifts not accepted

- Time shares
- Animals
- Automobiles, motorcycles, airplanes, boats or other vehicles
- Cemetery plots
- Any asset that would be illegal per applicable law

The Foundation reserves the right to refuse any gift that it believes is not in the best interest of the Foundation. If a gift is not accepted, Foundation staff will contact the prospective donor immediately.

TYPES OF NON-CASH GIFTS WE ACCEPT

It's easy to convert donor assets into charitable gifts. Contact us to learn if you have questions about a possible gift. Some gifts will require approval from the GSCF Finance Council. Types of non-cash assets:

- Appreciated Securities, publicly traded stocks, bonds, and mutual funds
- Real Estate, residential and commercial property or farmland
- Farm Equipment, such as tractors or combines
- Business Interest, privately held stock, limited partnership
- Tangible personal property, ie. coins, jewelry, art, antiques
- Livestock or Grain
- IRA Charitable Rollover for those 70 1/2 or older, up to \$100,000, including Required Minimum Distribution. (DAFs not included)
- Cryptocurrency
- Accounts Receivable Assets, loans or notes, or mortgages
- Transfer from a Donor Advised Fund
- Planned Gifts, Bequests, gifts by will or trust; retirement plan assets, and life insurance

Gifts by cash, check, or credit card can be made online or mailed to the Heartland Community Foundation: 1200 Main St., #102, Hays, KS 67601



Explain the potential tax benefits of donating non-cash assets, such as capital gains tax savings and potential deductions.



Encourage donors to consult their financial advisors before making non-cash gifts to ensure compliance with applicable laws.



Illustrate how non-cash gifts can significantly contribute to your mission, both for present needs and those in the future.



Emphasize the importance of donor intent when gifting non-cash assets and how HCF will honor the gift's intended purpose.

LEVERAGE DOLLARS TO FULFILL YOUR MISSION

Planned gifts tend to be larger, on average, than outright gifts. Take a look at your own data and evaluate this for yourself. You might be very surprised that you have received bequests without ever asking for them. *Then ask yourself how many more you might have received from those who cared deeply about your organization throughout their lifetime, but were never asked for a legacy gift.* By building a planned giving program and growing your endowment, you are better able to plan for the future and mitigate your risks through all economic cycles, so that you can continue to carry out your mission.

What is planned giving?

Planned giving allows your donors to transform their personal wealth into philanthropy for the benefit of their favorite nonprofits and causes, during their lifetime or after death in an estate gift. They can use methods like bequests, life insurance, or retirement accounts, providing tax benefits and securing future funding for charities.

For nonprofits, prioritizing planned giving discussions with donors helps ensure the long-term success of an organization. The Heartland Community Foundation can help you get started. We know your organization's development team works hard to keep the lights on. Adding a planned giving component to your development strategy will help ensure that the lights stay on forever.

MAKE A LASTING DIFFERENCE

Picture it. Just ONE planned gift could:

- Allow your organization to hire additional staff.
- Fund the purchase of a building, office, or vehicle.
- Provide a revenue cushion during hard economic times or to offset rising costs.
- Feed more families, fund more arts programs, save more animals, shelter more homeless, or make YOUR mission a reality in your community!

The Heartland Community Foundation Partnership

CONTACT HCF:
785-621-4090
HEARTLAND@GSCF.ORG

STEP 1: YOUR ROLE

1

YOUR ORGANIZATION

Identifies and qualifies a donor

Informs and cultivates the donor

Explores donor's best planned giving options

STEPS 2-4: COMMUNITY FOUNDATION ROLE

2

INTRODUCTIONS

Consults with you and the donor

Evaluates your donor's goals

Prepares gift proposal and MOU

No cost to the organization

3

GIFT ACCEPTANCE

Finalizes gift agreement

Ensures due diligence

Liquidates assets

Provides receipt/gift record

4

GIFT MANAGEMENT

Invests proceeds from asset sale

Makes annual gift to your organization

Provides ongoing philanthropic support

Contribution subject to investment fee



SHOWCASE YOUR ENDOWED FUND

Additional Resources

Organization Fund Guidelines:

https://heartlandcommunityfoundation.org/media/0jupegh3/organization-fund-guidelines_december-2019.pdf

Organization Fund Factsheet:

<https://heartlandcommunityfoundation.org/media/zjylltd0/fy23-organization-fund-fact-sheet.pdf>

PROMOTE YOUR ENDOWMENT

Sample language you can use to help promote your endowment fund. Edit and revise as needed!

Making a gift to the ORGANIZATION ENDOWMENT FUND NAME is a sound investment that supports our organization, now and in the future. Our endowment helps provide a steady stream of income to our organization. As our capacity is stretched to meet growing needs for our services, a reliable source of income ensures the mission of our organization is carried out.

The endowment fund, administered by the Heartland Community Foundation, is a permanent fund that is invested and grows over time through investment returns and donations to the fund.

Your gift to the ORGANIZATION ENDOWMENT FUND NAME is a forever gift, making it possible for our organization to serve our community and all those who need our support for generations to come! Just a few ways to give that you may consider include cash or stock gifts, and IRA charitable rollover, or leaving a planned gift to our endowment in your will by naming the fund as a beneficiary.

Online gifts can be made [HERE](#) (hyperlink giving page) or you can contact [INCLUDE ORGANIZATION CONTACT INFORMATION](#). You can also make cash donations by making your check payable to FUND NAME and mailing it to Heartland Community Foundation, PO Box 1673, Hays, KS 67601.

Some sample social media posts:

Leave a gift that will last a lifetime! Your gift to our endowment fund will grow and continue to benefit ORGANIZATION NAME for years to come.

Your gift to the ORGANIZATION FUND NAME not only provides funds for today, but also long-term stability for tomorrow.

Did you know you can support our organization today and forever by giving to our ORGANIZATION FUND NAME held at the Heartland Community Foundation. Donate here: [\[hyperlink\]](#)

Leave a gift that will benefit ORGANIZATION for years to come! Give to our endowed fund!

Create a legacy and support our mission by leaving a planned gift to our ORGANIZATION FUND NAME at the Community Foundation! Learn more here: [\[link to your website or HCF's\]](#)

QUICK START GUIDE

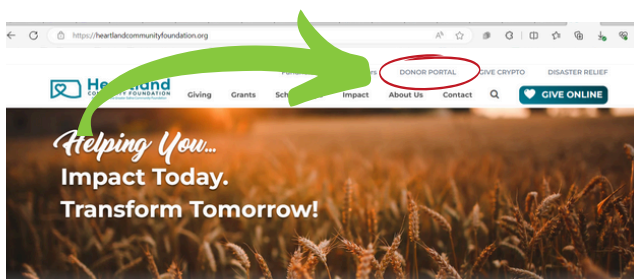
You can use the secure **donor portal** on the HCF website to access all of your fund activity in real time -- including your fund balance, quarterly statements, available spendable, and gift and grant history.

You will also have access to your past statements and documents. First-time users will receive an invitation link. They will be asked to log-in with their email address and prompted to enter a password.

Authorized donor portal users for your organization fund can be added and removed by contacting us at heartland@gscf.org. To access the donor portal, look for the button on our homepage.

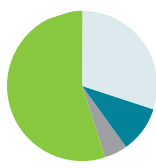
GO TO: www.heartlandcommunityfoundation.org

CLICK: **Donor Portal**

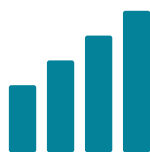


Once logged in, the secure homepage gives you a quick snapshot:

- Date Established
- Current Balance
- Available Spendable
- Total Contributions
- Total Grants



Grants



Contributions

Recommending a grant from your fund is easy. Organization funds can make grants to their organization or within the fund.

- 1** Log into the **donor portal** and click the "Recommend a Grant" tab.
- 2** Fill out the online form to make a grant to your own organization, a previous recipient, a different HCF fund, or a new grantee.
- 3** Submit your request. Our team will follow up. Grants are typically processed on Fridays.

ACCESS YOUR FUND ACTIVITY

CONTACT HCF:
785-621-4090
HEARTLAND@GSCF.ORG

More information can be found using these tabs on your Donor Portal:

- **Gift History** – view fund donation history
- **Grant History** – view fund grant history
- **Recommend a Grant** – submit a grant request or check the status of a request
- **Fund Statements** – view quarterly fund statements
- **Documents** – view fund agreements and supporting documents
- **Donate** – donate to a fund at the community foundation
- **Tax Receipts** – access copies of past tax receipt letters

FUNDING SOLUTIONS FOR YOUR PROJECTS & PROGRAMS

How are grants evaluated?

STRATEGIC IMPACT	Does the project provide solutions to a community need, enhance the quality of life, or demonstrate special initiative?
TARGET AUDIENCE	Will this project have meaningful impact in the community or for a specific demographic or underserved group?
URGENCY OF NEED	Is there a need for this project, a lack of other funding options, and a sound timeline? Has the need been adequately defined?
PARTNERSHIP	Does the project reflect collaboration and partnership, indicating community support?
BUDGET	Does the project have a complete budget and financial or in-kind support outside of HCF?
GRANT DIVERSITY	Has the committee taken into consideration the full list of grant selections to ensure a breadth of causes are included?
PRIORITY CAUSES	Education, youth, elderly, arts/culture, public safety, parks/recreation, social services, accessibility, healthcare, economic development, community enhancement/pride, food insecurity, diversity, faith, animals, and environment
OVERALL RESULTS	Will this project positively impact and enhance the community?

GRANT FUNDS

The Heartland Community Foundation has two competitive grant cycles with deadlines of **Nov. 15** and **May 15** each year. Apply online at www.heartlandcommunityfoundation.org under the GRANTS tab. If you receive a grant, you have one year to complete the project. A follow up report is required. Available funds include:

- Dane G. Hansen Community Grant Fund
- Heartland Area Action Fund
- Heartland Healthy Living Fund/Kansas Health Foundation Fund
- Ellis County Legacy Fund
- Rooks County Legacy Fund
- Stockton Community Fund (spring cycle only)
- Trego County Legacy Fund
- Heartland Area Disaster Funds (emergency preparedness)

GUIDELINES



GEOGRAPHIC GUIDELINES: HCF grants are restricted to projects and programs that directly impact the communities within Ellis, Rooks, or Trego County.



ELIGIBLE APPLICANTS: HCF can make grants to the following entities: 501(c)(3) nonprofit organizations, schools, government and municipal agencies, and religious entities. Individuals or organizations that do not fall into one of the above entities are encouraged to partner with a fiscal agent in one of those categories. If that is not possible, please contact the community foundation to see if your project still qualifies and if there are any additional reporting requirements.



TYPES OF PROJECTS FUNDED: **Projects or programs** that serve the community and/or advance the mission of the organization. **Seed money** to establish or initiate a new project, program, or organization. **Capacity building** to strengthen an organization to increase its ability to fulfill its mission. **Capital improvements** including new construction or renovation of a facility. The average grant awarded is \$2,000-\$7,000, but this can vary.



GRANT REQUESTS THAT CAN'T BE CONSIDERED: Incomplete, incorrect or late applications; political projects; organizations or projects that practice discrimination; operating deficits or retirement of debt. **Please note:** if the project has already happened, been paid for, or if materials have been ordered or a contract has been signed, this is considered funding debt and cannot be considered.

More details to know:

WHAT IS GIVE FEST?

A one-day community giving day, making match dollars available to participants to grow their endowments and for immediate needs

WHEN?

Oct. 10, 2024

Online giving is open Oct. 4-10, 2024
In-person event: TBD

WHO?

Any nonprofit fundholder that serves Ellis, Rooks, or Trego counties. A signed agreement form will be required.

HOW?

We'll match donor gifts to your fund 1:1 or proportionate to total funds raised, up to **\$150,000** in total.

WHY?

Growing endowed funds ensures long-term needs are met. Give Fest encourages donors to give endowed dollars.

BUT... DOES THIS HELP US NOW?

YES! Donor dollars will go to your endowed fund, match dollars will be available for immediate use if your fund is above \$10K.

WHAT DO WE HAVE TO DO?

Sign an agreement form, provide a 2-minute video so we can share about your organization, agree to promote Give Fest to your donors, celebrate and fundraise for Give Fest on Oct. 10. We'll help market the event!

OVERALL GOAL

Encourage philanthropy, raise awareness for your nonprofit and your endowed fund, and raise money for now and later.



*The Oktoberfest of Giving
Coming Oct. 10, 2024!*

WHAT IS GIVE FEST?

Give Fest is a one-day community giving event organized by the Heartland Community Foundation, aimed at empowering nonprofits in Ellis, Rooks, and Trego counties. During the "Oktoberfest of Giving," **\$150,000** in matching funds will be made available for qualifying nonprofit participants. Designed to boost the long-term capacity of organizations, the event focuses on growing endowments through matching donations while making cash available for immediate use.

In addition to financial support, Give Fest provides a platform for nonprofits to network, share their missions, and increase visibility.

ELIGIBILITY

- Participating nonprofits must have an endowed fund with HCF. Participation is at no cost to the organizations. Organization, Designated, and Field-of-Interest Funds are eligible.
- A Nonprofit Agreement & Registration Form is due to HCF by **Aug. 31** in order to participate in Give Fest. To establish a new fund, the completed fund agreement is also due by Aug. 31.
- Organizations will receive a 1:1 match or proportionate to the total amount raised, from a match pool of up to \$150,000. \$50,000 has been set aside for each county.
- Participants should market the event to their donors. HCF will supply organizations with a marketing toolkit beginning on **July 15**. **Access the toolkit at www.HeartlandGiveFest.org. Password: Givefest2024**
- No single organization is allowed to receive more than half of the total match per county.
- Donations by participating organizations to their own fund will not qualify for the match.
- Nonprofits may choose how to receive their matching dollars earned: cash grant for immediate use, only applicable if your fund has a balance of at least \$10,000; Or, direct to your fund.