

2011-2012 ENF Chairperson Reference Manual



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Orientation

Intended for both new and returning ENF Chairs, the Orientation section of the 2011-12 ENF Chair Reference Manual provides essential information for all ENF Chairs. After you familiarize yourself with this section and the ENF, you may find yourself revisiting topics for a refresher on programs, recognition and the how-to's in your daily business of being an ENF Chair. This information is best viewed initially by exploring each topic in order, as fully as possible, before moving onto the next topic.

DUTIES AND RESPONSIBILITIES

Congratulations! You were appointed (or reappointed) ENF Chair. You may ask yourself what that means and how to get started this year. The first step is to click on the position to which you have been appointed and familiarize yourself with the Duties and Responsibilities. It provides an overview of what the ENF expects of you, and your role with the ENF in your Lodge, district, and/or state.

Looking for more detailed information on the 'how-to's' of the position? The Fundraising and Development section in particular provides a detailed account of the mechanics of fundraising and how to best utilize the fundraising tools provided in the Resources and Reference section of this manual.

State Chair

You are the Elks National Foundation's representative to the constituents in your state and a leader for District and Lodge ENF Chairs. This document details the ENF's expectations of you. If you need help meeting these expectations, please contact the ENF at enf@elks.org or 773/755-4728.

Here are your responsibilities:

- Uphold the ENF Donor Bill of Rights.
- Promote the ENF's mission and programs to your constituents, District and Lodge Chairs through Lodge visits, programming and ENF seminars.
- Regularly communicate with and oversee your state's District and Lodge ENF Chairs to ensure they successfully accomplish their duties and responsibilities.
- Serve as a resource for your state's District and Lodge ENF Chairs by staying current with ENF News and familiarizing yourself with ENF information through your computer-based Reference Manual, the ENF website, monthly reports and *ENFFrontline*.

- Encourage Lodges in your state to utilize grant components of the ENF Community Investments Program (Impact Grant, Gratitude Grant and Promise Grant).
- Demonstrate your support of the ENF by donating each year.
- Improve your state's per capita from the previous year.
- Actively promote the Foundation at ENF-sponsored events such as Hoop Shoot or Drug Awareness events.
- Look to other State ENF Chairs and the ENF Staff for help. They can guide you in your role as ENF Chair by providing support, ideas, and knowledge through experience.

District Chair

You are the Elks National Foundation's representative to constituents in your District and a resource for Lodge ENF Chairs. This document details the ENF's expectations of you. If you need help meeting these expectations, please contact the ENF at enf@elks.org or 773/755-4728.

Here are your responsibilities:

- Uphold the ENF Donor Bill of Rights.
- Promote the ENF's mission and programs to your constituents and Lodge Chairs through Lodge visits, programming and ENF seminars.
- Regularly communicate with and oversee your district's Lodge ENF Chairs to ensure they successfully accomplish their duties and responsibilities.
- Serve as a resource for your district's Lodge ENF Chairs by staying current with ENF news and familiarizing yourself with ENF information through your computer-based Reference Manual, the ENF website, monthly reports and *ENFFrontline*.
- Serve as a liaison between your State ENF Chair and the Lodge ENF Chairs in your District.
- Encourage Lodges in your district to utilize the grant components of the ENF Community Investments Program (Impact Grant, Gratitude Grant and Promise Grant).
- Demonstrate your support of the ENF by donating each year.

- Improve your district's per capita from the previous year.
- Actively promote the Foundation at ENF-sponsored events such as Hoop Shoot or Drug Awareness events.
- Look to your State ENF Chair, the ENF Staff, and other District ENF Chairs for help. They can guide you in your role as ENF Chair by providing support, ideas, and knowledge through experience.

Lodge Chair

You are the Elks National Foundation's representative to the members of your Lodge. This document details the ENF's expectations of you. If you need help meeting these expectations, please contact the ENF at enf@elks.org or 773/755-4728.

Here are your responsibilities:

- Uphold the ENF Donor Bill of Rights.
- Promote the ENF's mission and programs to your constituents, through conversation, presentations, holding an ENF month fundraiser, and involvement at ENF-sponsored events such as Hoop Shoot or Drug Awareness events.
- Provide donors with accurate donor information and serve as liaison to the Foundation to resolve any donor questions or concerns.
- Solicit donations from members of your Lodge. This might include personal requests, appeals and fundraisers. Pay special attention to former donors and new members of the Order.
- Stay current on information from the ENF through tools and resources such as *ENFFrontline*, your computer-based Reference Manual, the ENF website, www.elks.org/enf, and monthly emails sent to ENF Chairs.
- Encourage your Lodge to utilize the ENF Community Investments Program by applying for grants to strengthen your community (Impact Grant, Gratitude Grant and Promise Grant).
- Share relevant information from *ENFFrontline* and ENF reports with donors, Lodge Officers, and your District and State ENF Chair.
- Recognize donors who recently supported the ENF; present recognition items such as Honorary Founder certificates or Cornerstone Club plaques; present red heart pins to first-time donors; maintain the donor recognition board at the Lodge.
- Demonstrate your support of the ENF by donating each year.

- Improve your Lodge's per capita from the previous year.
- Submit donations and remittances regularly to the ENF office.
- Identify members of your Lodge who are interested in the ENF and submit their names and email addresses to the ENF office.
- Look to your District and State ENF Chairs, the ENF Staff, and other Lodge ENF Chairs for help. They can guide you in your role as ENF Chair by providing support, ideas, and knowledge through experience.

Secretary Involvement

As outlined in our Donor Bill of Rights, we do not share individual giving information with Lodge members in order to uphold our donors' privacy. As a Lodge ENF Chair, you are expected to share reports and information with Secretaries and Exalted Rulers when necessary.

In addition to the information you share with your Lodge Secretary, the following resources are also available to him or her directly:

- **Electronic Remittances**

Lodge Secretaries can submit your Lodge's donations to the ENF if needed by generating an electronic remittance file. Electronic remittances should be saved as comma-delimited (CSV) or Microsoft Excel files (.xls), and can be submitted on disks or CDs. The file can also be sent via email, with the check sent via regular mail. The file should contain each donor's name, Lodge membership number, and gift amount. Please direct files, checks and questions to: Elks National Foundation, Attention: Marcee Northey, 2750 N. Lakeview Ave., Chicago, IL 60614, MarceeN@elks.org, 773/755-4854.

- **Donor ID Report**

This report will provide the Lodge Secretary with a list of current ENF members from your Lodge with their Donor ID number. This report is helpful when submitting remittances and updating Lodge records. The Donor ID Report is available online to Secretaries in CLMS2 under ENF Reports, and by request. Lodge ENF Chairs can also view this report in the Lodge Chair Only section of the website.

- **Donor Category Report**

This report will provide the Lodge Secretary with an alphabetical list of current ENF donors from your Lodge by cumulative donor level (i.e., Participating Member, Honorary Founder, etc.). This report is useful for maintaining a Recognition Board or adding ENF stickers to membership cards. The Donor Category Report is available online to Secretaries in CLMS2 under ENF Reports, and by request. Lodge ENF Chairs can also view this report in the Lodge Chair Only section of the website.

- Dues Mailing Inserts

This small slip is an easy way to encourage gifts to the ENF with dues mailings. It's small enough to fit inside most envelopes and light enough that it shouldn't increase postage! This slip makes for a great stuffer to promote the ENF, instead of our thicker brochures. Lodge Secretaries can order dues buckslips, free of charge, at www.elks.org/enf/SupplyOrders.cfm.

- Per-Capita Standings

Do you and your Lodge Secretary have Lodge members asking where your Lodge stands regarding the Grand Exalted Ruler's per-capita goal? Go to www.elks.org/enf/reports.cfm to find the answer! You'll need an elks.org username and password. The per-capita reports are updated every week, and they can be sorted by Lodge state, district or size.

- Membership Card Stickers

The ENF offers three membership card sticker options. "I'm a Member" stickers are red hearts to mark the card of someone who has given to the ENF. Donor Level stickers note the cumulative giving level a donor has reached with two options: dollar amount or corresponding level pin image. Pin Image stickers also signify a donor's cumulative giving level, mimicking the pin they receive at that level. Stickers are available, free of charge, at www.elks.org/enf/SupplyOrders.cfm.

DDGER Visit—2011-12

Elks National Foundation Requirements

The following ENF item may be required for your upcoming District Deputy visit:

- 2011-12 ENF Chair Reference Manual (the disk)
This manual may need to be shown to your District Deputy. As the disk is sent directly to Lodge ENF Chairs, the Lodge will not receive a copy. You can find a printable version online at www.elks.org/enf in the Volunteers section.

The ENF will not send information to Lodge Secretaries to remind them about the requirements for the DD visit. Please share this information with your Lodge Secretary.

Donor Bill of Rights

The Elks National Foundation considers philanthropy to be a voluntary action for the public good. It is this tradition of giving and sharing that drives and supports our work. To assure that our donors can have full confidence in the ENF and the programs we ask them to support, we declare that all of our donors have the following rights:

1. To be informed of the Elks National Foundation's mission, of the way we intend to use donated resources, and of our capacity to use donations effectively for their intended purpose.
2. To be assured their gifts will be used for the purposes for which they were given.

3. To receive appropriate acknowledgement and recognition.
4. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.
5. To be informed of the identity of those serving on the Elks National Foundation's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
6. To have access to the Elks National Foundation's most recent financial statements.
7. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by the law.
8. To expect that all relationships with individuals representing the ENF will be professional in nature.
9. To be informed whether those seeking donations are volunteers, employees of the Elks National Foundation or hired solicitors.

2011-12 Important Dates and Deadlines

April	
1	Elks Scholar Month of Service Impact Grant applications available
15	Class of 2011 (Most Valuable Student and Legacy Awards) scholarship winners published online at www.elks.org/enf
30	National Hoop Shoot finals in Springfield, Mass.
May	
1	Open Enrollment begins for the Class of 2011 ENF Named Scholarship Program
31	2010-11 Gratitude Grant application deadline
June	
1	The 2011-12 ENF Chair Reference Manual available online at www.elks.org/enf
1	Deadline to submit Chair Agreement Form to the ENF for Chair Challenge points
July	
1	2011-12 Emergency Educational Grant applications available
1	2011-12 Gratitude Grant and Promise Grant applications available— Online Only

17-21 [Grand Lodge Convention](#) in Phoenix, Ariz.

August

1 *ENFrontline* production begins
1 Monthly ENF Report Mailings begin to opted in Lodges
15 Annual scholarship mailing to Lodges
31 Impact Grant application postmark deadline

September

1 2012 ENF Scholarship contests begin (MVS and Legacy Awards)*
1 ENF issues news releases to AP/NewsWire announcing scholarship contest and availability of applications at Lodges and online
1 Class of 2011 ENF Named Scholarship Program enrollment deadline
1 Start planning for ENF Month!
* Visit www.elks.org/enf/scholars for MVS and Legacy Awards applications and deadlines.

October Elks National Foundation Month

25 2012 Impact Grant recipients announced
24-30 Red Ribbon Week for Elks Drug Awareness Program

November Elks Veterans Remembrance Month

1 Remember to submit your ENF Month fundraising reporting form to receive 10 points in the Chair Challenge.

December

31 Applications for 2011-12 Emergency Educational Grants due

January-2012

16 ENF Month Fundraising Reporting Form deadline

February

28 One month until the end of the 2011-12 fiscal year.

March

31 All donations **received to the ENF office** by this date are credited to the current fiscal year

ABOUT THE ENF AND OUR PROGRAMS

The mission of the Elks National Foundation is to help Elks build stronger communities. We fulfill this pledge by investing in communities where Elks live and work. We provide tomorrow's leaders, our youth, with a healthy beginning; honor the Elks' pledge to never forget our veterans; help the state Elks associations accomplish their charitable objectives; and fund projects that improve the quality of life in local Elks communities.

Along with all Elks, the Foundation values the belief that charity is the greatest of all virtues and that by sharing and giving, we have the power to replace sorrow and despair with hope and confidence. All donations to the Foundation are tax deductible and help fund programs that support our cornerstone values of knowledge, integrity and community.

To be a successful ENF Chair, you must be familiar with all ENF-funded programs in order to promote the ENF and solicit donations from your fellow Elks. The Case for Support is especially important to your efforts and should be used to demonstrate why all members should support the great heart of Elkdom—the Elks National Foundation.

ENF Case Statement



Elks National Foundation

Helping Elks Build Stronger Communities

The Case for Support

2750 N. Lakeview Ave., Chicago, IL 60614 • 773/755-4728 (voice) • 773/755-4729 (fax)
enf@elks.org (email) • www.elks.org/enf (website)

Our Mission: Helping Elks Build Stronger Communities



The mission of the Elks National Foundation is to help Elks build stronger communities. We fulfill this pledge by investing in communities where Elks live and work. We provide tomorrow's leaders, our youth, with a healthy beginning; honor the Elks' pledge to never forget our veterans; help the state Elks associations accomplish their charitable objectives and fund projects that improve the quality of life in local Elks communities.

Like all Elks, the Foundation values the belief that charity is the greatest of all virtues and by sharing and giving, we have the power to replace sorrow and despair with hope and confidence. Donations to the Foundation help us fund programs that support our cornerstone values of knowledge, integrity and community.

Safer, Better Places to Live: Community Investments Program

After surveying more than 1,000 Exalted Rulers about the needs in their communities, we discovered that a struggling economy topped the list. With this knowledge, in 2005 the ENF launched the Community Investments Program to broaden our mission of helping Elks build stronger communities. Through direct investments in Lodge communities, the CIP funds projects that have a significant and lasting impact on areas where Elks live and work.



The CIP includes the following components: Impact Grants, Gratitude Grants, Promise Grants, and Lodge Assistance Grants. Each grant component requires Lodges to apply to the ENF for funding. Together, the grants provide Lodge members with meaningful ways to interact with their community while supporting important local initiatives.

In 2011-12, the Elks National Foundation will invest up to \$4.6 million in local communities through Gratitude Grants, Promise Grants and Impact Grants. To learn more about the Community Investments Program, please visit www.elks.org/enf/community.

ENF In Your State: Grants to State Elks Associations

This year, the ENF will distribute more than \$8 million to the state Elks associations so Elks can decide how best to further their philanthropic outreach in their local communities. These grants are divided into three areas: special projects, state charities and bonus grants. Special Project Grants allow the states to support national programs, expand their existing charitable projects, and explore new initiatives. State Charities grants typically fund state major projects, such as aid for people with disabilities, cancer research, children's hospitals, youth camps, and safe havens for abused families.

In 2010-11, the Elks National Foundation allocated more than \$8.1 million to the state Elks associations. To find out how the ENF is helping your state, visit www.elks.org/enf/YourState.

The Pursuit of Knowledge: College Scholarships

Most Valuable Student

What makes a most valuable student? A most valuable player is defined as the player judged to be the most important to the sport. Our MVPs are at or near the top of their class, are active in school and community activities, are recognized as a leader by their peers and need help financially to attend college.



Thanks to the Elks National Foundation, students like Bryan Dongre from Brookfield, Wisconsin, and Jenny Van from Fort Smith, Arkansas—the 2010 Most Valuable Student top winners—are attending the likes of Princeton and the Massachusetts Institute of Technology. Their Elks National Foundation MVS scholarships help make their dreams realities and their goals more attainable.

"I know the Elks Most Valuable Student award will bring about a whole new set of opportunities for me, and for that, I graciously thank the Elks National Foundation," said Bryan during his speech to the delegates at the 2010 Grand Lodge Convention in Orlando, Fla.

The Most Valuable Student scholarship contest, open to all high school seniors who are U.S. citizens, kicks off each year in September. Visit www.elks.org/enf/scholars for the contest deadline. Applicants, who are judged on scholarship, leadership and financial need, advance through Lodge, district and state levels to reach the national finals. National finalists compete for two first-place scholarships of \$60,000,

two second-place scholarships of \$40,000, two third-place scholarships of \$20,000 and twelve fourth-through seventh-place awards ranging from \$8,000 to \$16,000. The 482 runners-up receive scholarships of \$4,000. Winners are announced in April.

ENF Legacy Awards

Based on the principle that charity should begin at home, the Elks National Foundation established the ENF Legacy Awards program in 1998. ENF Legacy Awards provide educational assistance to children and grandchildren of current Elks members. Applicants must be high school seniors, going on to college, who exhibit the core values of the Elks National Foundation: Knowledge, Charity, Community and Integrity. The Legacy Awards provide a 4-year, \$4,000 award for up to 250 deserving winners from Elks families.



ENF Legacy Award recipient Erin Seivley's passion for volunteering stems from her grandfather. An Elks member for over 50 years, Erin's grandfather encouraged Erin to volunteer at his Lodge, which quickly became an important part of her life. Thanks to her ENF scholarship, Erin is able to pursue a career in architecture in college, and still has time to continue to volunteer.

"Being an ENF Legacy Award scholar is an honor I cherish, because I represent the Elks community that has helped me in so many ways," Erin explains. "The ENF has provided me with more than financial support; they have given me the opportunity to help those in my community."

Emergency Educational Grants

The Emergency Educational Grants provide college financial assistance to children of deceased or totally disabled Elks. Grant amounts range up to \$4,000. But more important, the program provides hope to Elks children who can face a difficult road ahead.

Kari Massar had always wanted to be a pediatrician, but the sudden death of her father shook that dream. Suddenly, her own education was in jeopardy. Fortunately, her father was a longtime member of the Elks, making Kari eligible for an Elks National Foundation Emergency Educational Grant. Thanks to this scholarship, she is able to attend the University of Colorado and work toward her goal of becoming a pediatrician.



"My education would not be possible without the help from everyone at the ENF!" exclaims Kari. "I am grateful for the grants you have graciously awarded me; my family and I now expect great things and success in my future."

The ENF awarded \$305,025 in grants to 107 children in 2010-11. In a survey of EEG recipients, the ENF learned that prior to receiving our grant, 53 percent of the students felt major concerns about having enough funds to complete college. Similarly, 70 percent of parents had major financial worries. However, the impact of our grants is encouraging. After receiving an EEG, the number of recipients who had concerns about financing college fell to 14 percent, and parents' worries dropped to 24 percent.

The Elks National Foundation provides more than \$3.6 million in college scholarships each year. For more information about our scholarship programs, including eligibility and deadlines, please visit www.elks.org/enf/scholars.

Remembering Heroes: Elks National Veterans Service Commission



During World War II, the Elks first pledged, “so long as there are veterans, the Benevolent and Protective Order of Elks will never forget them.” Today, the Elks remain committed to remembering veterans and have expanded their presence at VA hospitals; increased efforts to assist homeless veterans; and devotedly supported the men and women who are currently serving overseas.

The Elks National Foundation provides funding for the Elks National Veterans Service Commission, which honors the 25 million veterans in the United States. In each of the 153 VA Medical Centers across the country, Elks Veterans Administration Voluntary Service Representatives spend time hugging heroes, shaking hands, giving thanks, and offering comfort and companionship to hospitalized veterans.

Together, the Elks National Foundation and Veterans Service Commission will show the next generation of veterans that Elks care about our nation’s heroes.

In 2011-12, the Elks National Foundation allocated more than \$1.135 million to fund the Elks Veterans Service Commission. For more information on the Veterans Service Commission, visit www.elks.org/vets.

Instilling Integrity in our Youth: Preserving our Future

Elks believe youth are our country’s most precious resource and that we have a responsibility to protect and encourage youth to become valuable members of society. We do this by educating kids and parents about the dangers of drug use, and providing healthy extra-curricular activities that build self-esteem and promote values such as integrity, hard work and dedication.



The mission of the Elks Drug Awareness Program is to promote constructive and cooperative approaches to prevent America’s youth from using illicit substances. The program accomplishes this through the education of students and parents, and by assisting schools with programs and educational materials.

“The program has become more mobile and more visual,” says Kent Gade, the program’s national director. Besides distributing literature, current efforts include a Marvel comic book, a music video, drug awareness trailers, Red Ribbon week celebrations and continued relationships with expert drug prevention groups. The program also conducts conferences and workshops.

In 2011-12, the Elks National Foundation allocated \$715,350 to fund the Elks National Drug Awareness Program. For more information on the Drug Awareness Program, visit www.elks.org/dap.

The Elks Hoop Shoot National Free Throw Contest, which boasts more than 3 million participants each year, gives kids an alternative to destructive behavior. The contest begins at the local level, with winners advancing to a national competition. Some national finalists have gone on to play professional basketball. Many more participants have had successful college sports careers. regardless of whether sports play a role in their futures, the Hoop Shoot helps kids succeed in life, both on and off the court.



But



The program emphasizes characteristics such as integrity, good sportsmanship, quality family time and the value of hard work. “It was an incredible experience,” says Lanae Saunders, a 1977 national champion. “The Hoop Shoot increased my self-confidence then, and throughout my life. It taught me that if I worked hard, I could achieve my goals.”

Feedback about the program is overwhelmingly positive. Ninety-eight percent of the families of Hoop Shoot national finalists would recommend Elks youth programs to other families. More than 80 percent of participants would recommend the Hoop Shoot program to their friends.

In 2011-12, the Elks National Foundation allocated \$809,275 to fund the Elks National Hoop Shoot Free Throw Program. For more information on the Hoop Shoot, visit www.elks.org/hoopshoot.

How Can You Help? Giving to the ENF

Recurring Gift: Sign up for a recurring gift and allow us to debit your bank account or charge your credit card each month for a set donation amount.

Online Gift: Support the ENF online at www.elks.org/donate.

Annual Gift: You can make a one-time donation to the ENF via check, Discover Card, Visa, MasterCard or American Express.

Pledge: You can also contribute to the Foundation through a pledge. You choose to receive a pledge reminder annually, semi-annually, quarterly, or monthly.

Matching Gift: Double the impact of your gift through matching gifts! Many employers will match gifts given to charitable organizations by employees and their spouses, even if they’re retired.

Payroll Deduction: Sign up for payroll deductions through your employer or the CFC, an easy way to give to the ENF!

Tribute: Contribute to the ENF in memory or in honor of friends and loved ones.

Planned Gift: Show your ultimate commitment through a planned gift, such as a bequest, gift of appreciated stock or life insurance. Visit www.enfplannedgiving.org for information.

Elks National Foundation Overview: Governance, Staff and Finances

Governance

The Elks National Foundation is governed by a seven-member Board of Trustees, all of whom are past national presidents of the Order. Members of the board of trustees demonstrate a high level of commitment to the Foundation, the Order, and their communities.

Currently the members are as follows: Robert J. Sabin, Chairman; Donald D. Dapelo, Vice-Chairman; C. Valentine Bates, Secretary; James W. Damon, Treasurer; Charles F. Williams, Assistant Secretary; Frank O. Garland, Assistant Treasurer; Amos A. McCallum, member. The National Director, Jim O’Kelley, oversees the day-to-day operations of the organization.

Staffing and Service Delivery

The Elks National Foundation currently employs 16 full-time employees. Areas of responsibility include: programs management, administration, development and fundraising, volunteer training and management, and donor services. The Foundation staff has a combined 100+ years of service to the Elks and a wide range of backgrounds including journalism, volunteer service, overseas assignments, fundraising and financial management.

Our work would not be possible without volunteers. We rely on thousands of volunteers at the Lodge, district and state levels to not only raise funds and awareness of the Foundation, but to administer and promote ENF-funded programs. We are fortunate to have committed and enthusiastic volunteers and we strive to provide them with the training and support they need.

The Story of the ENF

In 1928 John F. Malley approached his fellow Elks with an idea. He suggested they raise money to help others, but not in the traditional way. He wanted to invest the money in an endowment fund so the money would grow and help even more people in the future.

It wasn't an easy sell. Malley's fellow Elks wondered why not use all the money to help people now. In 80 years, who knows if people will even need help?

But Malley persevered. He eventually convinced his brother Elks to start the Elks National Foundation. And here we are now. Malley's plan started with a grant of \$100,000. His vision has grown into an endowment fund of more than \$480 million.

Today, people still ask why they should donate to the Foundation's endowment fund when people need help now, not 80 years from now. Lucky for the ENF, our donors share Malley's vision and we continue to raise more than \$6 million annually through our fundraising efforts. And like that initial \$100,000 grant, over time, the value of their donations will pay out to help many times over.

In 1928, Malley could not have predicted exactly who the ENF would be helping 80 years later. But he could have predicted that Elks all across the country would be helping many. Today, ours is a story of communities. The ENF funds programs that improve Elks communities through education, youth activities, and service to others. Each of the programs we fund has a story of its own.

Giving Back

Early on, ENF Trustees recognized the role of the Foundation in furthering the philanthropy of the state Elks associations. In 1931, four states were already doing great things through their scholarship and children's therapy programs. The Foundation awarded its very first grants to these four states. Our commitment to giving back to the states has grown from there. By 1969, every state association was receiving grant funding from the ENF.

Some states are now addressing problems that existed in 1928, but most are doing more. Today, these grants still fund scholarship and children's therapy programs, but they also fund youth camps, medical clinics, safe havens for abused women and children, programs for disabled adults and much more.

In 2010-11, the Elks National Foundation allocated more than \$8.1 million to the state Elks associations. To find out how the ENF is helping your state, visit www.elks.org/enf/YourState.

Helping at Home

Every community has its own unique history, its own traditions and its own needs. The idea for Community Investments Program was sparked in 2001 with this thought in mind. Knowing each Lodge understands the needs of their community best, the ENF decided to let them determine how they can help.

In 2005, the ENF launched the Community Investments Program with \$200 Gratitude and Promise Grants. Lodges used these grants to buy dictionaries for third-graders, to support families of troops overseas and to host after-prom parties for high school seniors. The ENF Board of Trustees took notice, and the grants have since increased to \$2,000 each, and increase of 1,200 percent!

Impact Grants allow Elks to improve their communities in more significant and lasting ways. Impact Grants are worth up to \$10,000 each, and Lodge recipients have used them to build wheelchair ramps for disabled community members, to start an after-school tutoring program for underprivileged youth, to implement a meal program for the elderly and much more.

In the years to come, Elks will find new and innovative ways to help their communities. And, thanks to Malley's vision, the Foundation—fueled by millions of dollars from hundreds of thousands of donors—will be there to make their stories a reality.

The Elks National Foundation will invest up to \$4.6 million this year in local communities through Gratitude Grants, Promise Grants and Impact Grants. To learn more about the Community Investments Program, please visit www.elks.org/enf/community.

The Pursuit of Knowledge

It's hard to imagine high school seniors not worrying about obtaining scholarships with today's rising tuition costs. In 1931, however, few people attended college and even fewer scholarships were offered. The Foundation recognized the importance of education and initiated the first ENF scholarship of \$300 each. In 1933, the program was officially named the Most Valuable Student program.

Today our Most Valuable Student scholarships total nearly \$2.3 million annually. In addition, the Foundation funds and operates two scholarships for Elks families. The Legacy Awards are open to any child or grandchild of an active Elk, and Emergency Educational Grants support children of deceased or totally disabled Elks.

The Foundation awards scholarships to more than 850 deserving students each year. They study to be engineers, teachers, politicians, astronauts, etc. Each has their own story and their own dreams. Through our scholarship programs, the Foundation helps them achieve those dreams.

The Elks National Foundation provides more than \$3.6 million in college scholarships each year. For more information about our scholarship programs, including eligibility and deadlines, please visit www.elks.org/enf/scholars.

Hoop Dreams

Corvallis, Ore., 1946. The late PGER Frank Hise was observing a group of boys playing basketball. He noticed that the smaller kids had a hard time keeping up with the others. To level this imbalance, he organized a free-throw contest where every kid could participate. On that day, the Elks Hoop Shoot was born.

The Hoop Shoot grew steadily over the next 30 years. In 1972, it became a national contest. Two years later, the Foundation began funding the program. Today, more than 3 million shooters enter the contest each year. Seventy-two of them make it to Springfield, MA, for the national finals.

The Hoop Shoot program levels the playing field for millions of kids each year. For some of those kids, it's a story of triumph, for others, a story of defeat. But for all participants, it's a story of courage, sportsmanship and life lessons.

In 2011-12, the Elks National Foundation allocated \$809,275 to fund the Elks National Hoop Shoot Free Throw Program. For more information on the Hoop Shoot, visit www.elks.org/hoopshoot.

Just Say No

In 1983, the Elks leadership surveyed mayors around the country to find out how the Elks could help their communities. Overwhelmingly, the greatest need was drug prevention.

The Elks Drug Awareness Program began with the distribution of literature. The plan was simple: print literature and distribute it to Lodges. Elks at the local level made sure the literature landed in the hands of the people who needed it most.

This early volunteer effort has grown into one of the largest volunteer-driven drug prevention and education programs in the country. Today, their reach extends beyond distributing literature. The program supports a Marvel comic, a music video, drug awareness trailers in communities nationwide, Red Ribbon Week activities, public service announcements and much more.

Drug culture and patterns are constantly changing. Through various partnerships, the Elks Drug Awareness Program works hard to keep up with the trends. The program is a story of hope that our communities can and will win the war on drugs.

In 2011-12, the Elks National Foundation allocated \$715,350 to fund the Elks National Drug Awareness Program. For more information on the Drug Awareness Program, visit www.elks.org/dap.

Honoring a Pledge

The Elks' commitment to honoring and supporting America's veterans dates back to World War I, when the Order banded together to build hospitals for soldiers returning from the War.

During World War II, the Elks again found themselves serving returning soldiers in hospitals. The Elks provided the hospitals with radios, phonographs, playing cards, books, magazines, games, musical instruments, craft supplies and personal items to entertain the soldiers during their stay. Most important, the Elks took the time to visit with them, listening to their stories and offering support.

These stories led to the creation of the Elks National Veterans Service Commission in 1946 and the Elks pledge that "so long as there are veterans, the Elks will never forget them."

Today, the Elks continue providing support to veterans. In 1984, the Elks National Foundation began funding the efforts of the Elks National Veterans Commission.

In 2011-12, the Elks National Foundation allocated more than \$1.135 million to fund the Elks Veterans Service Commission. For more information on the Veterans Service Commission, visit www.elks.org/vets.

Community Investment Programs

After surveying more than 1,000 Exalted Rulers about the needs in their communities, the ENF discovered a struggling economy, drug and alcohol abuse, and the lack of constructive after-school activities for area youth topped lists. With this in mind, the ENF launched the Community Investments Program in 2005 to broaden our mission of helping Elks build stronger communities. The CIP funds projects that have a significant and lasting impact in areas where Elks live and work. In 2011-12, the ENF Board of Trustees allocated \$4.6 million to fund the Community Investments Program.

The CIP includes four main grant components: Gratitude Grants, Promise Grants, Impact Grants, and Lodge Assistance Grants. Together, these grants provide Elks Lodges with meaningful ways to interact with their community and make it a better place by supporting important local initiatives. To learn more about the Community Investments Program, visit www.elks.org/enf/community.

Gratitude Grants

Gratitude Grants are the Foundation's way of thanking Lodges for their continued support of the ENF. They are grants of up to \$2,000 per Lodge, per year. All Lodges that meet the Grand Exalted Ruler's annual per-capita goal are eligible to apply for a Gratitude Grant. Lodges can use Gratitude Grant funds to support a local cause in their community or to host a charitable event.

Lodges use this grant in many meaningful ways, including making donations to homeless shelters and food pantries; hosting youth dances or holiday parties; purchasing textbooks or other materials for a local school; and supporting local veterans organizations and hospitals.

Promise Grants

Twenty-nine percent of adults and 17 percent of youth say it's difficult to find safe and structured places for youth to go after school. Promise Grants tackle this need by offering Lodges a reimbursement grant of up to \$2,000 a year to host an event that builds the character and competence of local youth.

Starting July 1, 2011, the ENF will have Promise Grant applications available online only. All events must be completed between July 1, 2011, and July 31, 2012. The first 500 Lodges to apply and qualify for a Promise Grant receive up to \$2,000.

Some examples of how Lodges use Promise Grants include hosting post-prom and post-graduation parties for local students; sponsoring Red Ribbon week celebrations; and hosting fishing derbies.

Impact Grants

In February 2007, the ENF Board of Trustees approved funding for a new, competitive grant program. In a short time, Impact Grants have already become an important part of the Community Investments Program. In 2011-12, the Foundation will award up to \$500,000. All Lodges are eligible to apply for an Impact Grant for up to \$10,000. Visit the ENF website (www.elks.org/enf) for important dates and deadlines.

Unlike Gratitude Grants and Promise Grants, which are designed to support small-scale charitable giving by Lodges, Impact Grants are intended to make a more profound difference in Elks communities. Impact Grants support Lodges looking to make a significant difference in their communities. These larger, competitive grants offer Lodges an opportunity to conceptualize, develop and implement a new project or to strengthen an existing one. With a maximum award of \$10,000, Impact Grants provide a select number of Lodges substantial funding to make a real difference in their communities.

Lodge Assistance Grants

Lodge Assistance Grants help Lodges secure donations from local businesses for specific Lodge charitable projects through monetary donations to the Foundation. With this grant, the Foundation extends the benefits of our charitable status to both the business and the Lodge.

All too often, local businesses are reluctant to support Lodge projects because Lodges are not considered charitable organizations under the qualifications of a 501(c)(3). Many businesses even have written policies stating that they can only donate to 501(c)(3) organizations can receive donation funding from them. In order to help Lodges receive donations for their charitable projects from these specific businesses, the Foundation developed the Lodge Assistance Grants.

Contact Us

For more information on the Community Investments Program and the grants available to your Lodge, please visit www.elks.org/enf/community. If you have questions, please contact the ENF Programs Department by phone at 773/755-4730 or email ENFPrograms@elks.org.

Scholarship Programs

In 2011-12, the ENF Board of Trustees allocated \$3.646 million to fund the ENF's three scholarship programs.

Most Valuable Student Scholarships

According to The College Board, for the 2009-10 academic year, the average cost of tuition, room and board at a public university was \$14,333; for a private school, the total with room and board averaged \$34,132. Due to rising costs, nearly two-thirds of college graduates leave school with debt, with the average undergraduate borrowing more than \$19,000 to finance their education.

Thanks to the Elks National Foundation, students like Bryan Dongre from Brookfield, Wisconsin, and Jenny Van from Fort Smith, Arkansas—the 2010 Most Valuable Student top winners—are attending the likes of Princeton and the Massachusetts Institute of Technology. Their Elks National Foundation MVS scholarships help make their dreams realities and their goals more attainable.

"I know the Elks Most Valuable Student award will bring about a whole new set of opportunities for me, and for that, I graciously thank the Elks National Foundation," said Bryan during his speech to the delegates at the 2010 Grand Lodge Convention in Orlando, Fla.

Since 1931, the Elks National Foundation has been helping Most Valuable Student Scholars fulfill their academic dreams. In 2011, the Foundation will award a total of \$2.296 million in four-year scholarships to 500 national MVS finalists.

The Most Valuable Student scholarship contest, open to all high school seniors who are US citizens, kicks off each year in September. Visit www.elks.org/enf/scholars for the contest deadline. Five hundred national finalists compete for top awards, ranging from \$60,000 to \$8,000 over four years. The 482 runners-up receive \$4,000 scholarships over four years. Winners are announced in April.

ENF Legacy Awards

Based on the principle that charity should begin at home, the Elks National Foundation established the ENF Legacy Awards program in 1998. The Legacy Awards provide educational assistance to children and grandchildren of current Elks members. Applicants must be high school seniors going on to college, who exhibit the core values of the Elks National Foundation: Knowledge, Charity, Community and Integrity.

Legacy Awards are four-year, \$4,000 scholarships. The Foundation will offer a total of up to 250 Legacy Awards.

Emergency Educational Grants

The spirit of the Emergency Educational Grants are to help Elks children access higher education, despite the financial obstacles they face. The Elks National Foundation established the EEG program in 1944, as a way to help the children of Elks who lost their life or became incapacitated as a result of serving in the armed forces during World War II. Now, the program includes all children of Elks who have died or become totally disabled. In 2010-11, the ENF awarded 107 students a total of \$305,025 in Emergency Educational Grants each worth up to \$4,000 per year.

For more information about the Elks National Foundations' scholarship programs, visit our website at www.elks.org/enf/scholars. If you have questions, please contact the ENF Scholarship Office by phone at 773/755-4732 or email scholarship@elks.org.

Scholar Relations

Today's Elks Scholars are tomorrow's Elks. The Elks National Foundation welcomes its scholars into the Elks family. The ENF offers students different opportunities to get to know each other and get involved with the Lodge in their area. Ultimately, the goal is to mold Elks scholars into champions of the Order by encouraging them to:

- **Share** stories.
- **Give** back to their community.
- **Join** the Order.

To encourage these actions, the ENF has assembled an Elks Scholar Advisory Board and created an Elks Scholar Month of Service for students who've received scholarships from the ENF. Read on to learn about these Elks Scholars opportunities.

Elks Scholar Advisory Board

Students who receive Elks scholarships are the cream of the crop; they are true leaders in their schools and their communities. Formed in 2009-10, the Elks Scholar Advisory Board exists to utilize the talents of a few to be the voice of all Elks scholars, and to champion Elks Scholar initiatives.

The Scholar Advisory Board is made up of eight Elks scholars interested in shaping the future of the Elks scholar experience. The Board promotes opportunities for scholars to get involved in their communities and connect to the Order. Keep an eye out for Elks scholars in your area; the Scholar Advisory Board will encourage them to be more involved than ever!

Visit www.elks.org/enf/scholars/scholaradvisoryboardmembers.cfm to read about this year's Elks Scholar Advisory Board members!

Elks Scholar Month of Service

The ENF encourages scholars across the nation to come together and give back to their community during the Elks Scholar Month of Service in April.

Elks scholars work together on college campuses and in their geographic areas. Once they have a service team in place, they are encouraged to turn to the Elks Lodge nearest them for support for their service project. Your Lodge can help make the Elks Scholar Month of Service a success! Your Lodge may be called on by an Elks scholar service team for project ideas, material support or additional helping hands during the Elks Scholar Month of Service.

If your Lodge would like to participate in the Elks Scholar Month of Service, email scholarship@elks.org and the ENF office will encourage Elks scholars near your Lodge to contact you with details about their service project.

Stay tuned to our website and publications to learn about the 2012 Elks Scholar Month of Service.

Veterans Service Program

During World War II, the Elks first pledged, “So long as there are veterans, the Benevolent and Protective Order of Elks will never forget them.” Today, the Elks remain committed to remembering veterans and have expanded their presence at VA hospitals, increased efforts to assist homeless veterans, and supported the men and women who are currently serving overseas.

For 2011-12, the ENF granted \$1.135 million to the Elks National Veterans Service Commission. The funding supports Elks Veterans Administration Voluntary Service Representatives, who offer comfort and companionship to hospitalized veterans in each of the 153 VA Medical Centers across the country.

“Our primary goal is to do whatever we can for veterans,” explains Harold Davis, a VAVS representative in Maryland. “The more we see their needs, the more we can do to help.”

With funds from the ENF, the commission also provides veterans with occupational and recreational therapy through the Veterans Leather Program and Playing Cards for Veterans. By presenting concerts by Re-Creation USA, a group of entertainers who perform at VA medical centers, the Elks veterans program offers entertainment for patients confined to hospitals. The commission has also joined with the Veterans Administration in hosting Stand Downs, at which volunteers provide homeless veterans with food, shelter and comfort, while agencies offer services such as health screenings and employment opportunities.

Recently, the Elks veterans program has become an official collecting partner of the Library of Congress Veterans History Project, which collects and preserves the wartime stories of veterans.

For more information visit, www.elks.org/vets.

Youth Programs

The Elks youth programs educate kids and parents about the dangers of drug use, and provide healthy extra-curricular activities that build self-esteem and promote values such as integrity, hard work and dedication. For 2011-12, the Elks National Foundation granted \$713,350 to the Elks Drug Awareness Program and \$809,275 to the Elks National Hoop Shoot Free Throw Program.

Drug Awareness

The Elks Drug Awareness Program started in 1983 in an effort to make a difference in the increasingly difficult struggle to curb drug use. The mission of the Elks Drug Awareness Program is to promote constructive and cooperative approaches to prevent America's youth from using illicit substances. The program accomplishes this mission through the education of students and parents and by assisting scholastic institutions with programs and educational materials.

With its constant struggle to reach more children, the Drug Awareness Program has evolved from simply handing out brochures to owning more than 90 Drug Awareness trailers. "The program has become more mobile and more visual," says Kent Gade, the program's national director.

Besides distributing literature, current efforts include Elroy the Elk, Red Ribbon week celebrations, visual communication tools such as the UR Choice UR Voice music video, Marvel Hard Choices comic book, and national partnerships with drug prevention organizations.

Teaming up with Milton Creagh, America's renowned motivational speaker for teens, the Elks present UR Choice UR Voice. This music video and educational program for middle and high school students warns them about the dangers of drugs and alcohol. The music video, featuring award-winning producers and directors, was distributed to select schools around the country and viewed by thousands of students.

To watch the video, or for more information on the Elks National Drug Awareness Program, visit www.elks.org/dap.

Hoop Shoot

The Elks National Hoop Shoot Free Throw Contest has its roots on a playground in Oregon in 1946. Since then, it has grown into a national program with more than 3 million participants each year. The program begins at the local level, with winners advancing through district, state, regional and national competition.

The names of the national champions each year are inscribed in the Basketball Hall of Fame in Springfield, Mass. Some national finalists have gone on to play professional basketball. Many more participants have had successful college sports careers.

The program emphasizes characteristics such as integrity, good sportsmanship, quality family time and the value of hard work. When surveyed, 98 percent of the families of Hoop Shoot national finalists said they would recommend Elks youth programs to other families. More than 80 percent of participants would recommend the Hoop Shoot program to their friends.

For more information on the Hoop Shoot, visit www.elks.org/hoopshoot.

FUNDRAISING AND DEVELOPMENT

Fundraising, also known as development, isn't easy; it requires preparation, persistence and hard work. Why do we do it? For one thing, the Elks National Foundation could not thrive without it. While fundraising might not be easy, it can be made *easier* by following the development process, which you'll learn about in [ENF's Fundraising Strategy](#).

Next, learn about the tools available to help you succeed. Many tools are provided in this manual, and many more are available to you online, by contacting the ENF office, or by ordering free ENF supplies. Read more in [Reports and Supplies](#).

Then, explore ideas for promoting the ENF at Indoctrination and during other Elks events. Learn what worked in fundraising from your fellow ENF Chairs and get creative with your efforts. You can't go wrong with these [Fundraising Ideas](#).

Finally, consider all the methods a donor may employ in giving their support to the ENF. Donations come in all shapes and sizes. Help each donor find the best fit for them by familiarizing yourself with the many [Ways to Give](#).

ENF's Fundraising Strategy

Every charitable organization has a plan for raising money. Although the ENF Development Plan is tailored to our own donors' circumstances and needs, the ENF follows a common strategy with the ultimate goal of moving donors up.

Fundraising 101

As a fundraiser, you should focus your efforts on raising money annually. This section explains basic fundraising principles, such as the donor pyramid and case expression. Also included is a list of solicitation strategies in order of effectiveness.

The Annual Giving Process

Annual donations make up the foundation of every fundraising plan. The ENF bases all goals, contests and standings on the fundraising results within one fiscal year, from

April 1 through March 31. Therefore, you should plan your fundraising techniques around developing a pattern of annual giving, and go from there.

The basic formula for an annual giving program is:

1. Get the gift.
2. Repeat the gift.
3. Upgrade the gift.

The Donor Pyramid represents members, prospects and donors in your Lodge and their relationship to the ENF. Developing a pattern of annual giving is the first step in building the pyramid. Your ultimate goal as ENF Chair is to move donors up the pyramid by increasing their commitment to the ENF, thus getting, repeating and upgrading their gifts. Ultimately, donors will include the ENF in their will or estate plans as a planned gift.

Members who have never donated to the ENF are at the bottom of the pyramid. It's a broad pool of people. Once a donor makes their first gift, they move up to the next tier of the pyramid and the pool of people narrows. At the top of the pyramid are those donors who have demonstrated the ultimate commitment to the ENF by including us in their estate plans. This group is the narrowest of all, but provides a significant amount of support.

ENF Development Plan

Our plan outlines the donors on whom we focus and the different methods we use to build stronger relationships with them, meeting everyone's needs and expectations.

The ENF development (fundraising) plan focuses on five groups, or tracks, of constituents. Each track incorporates smaller projects managed by the ENF Development staff. Read a summary of each track and how your volunteer efforts play an important role. Keep in mind, a single constituent may belong to more than one track.

The **Prospect** track includes projects designed to attract, identify and communicate with potential new donors. These projects involve informing them of our programs and highlighting our case for support through various promotional pieces and communications, and through you, our volunteers. When you speak with new members at Indoctrination and encourage them to donate, or encourage members who've never given, you're helping the ENF cultivate this prospect group.

Once a prospect makes his or her first gift, they move into the New Donor track. This ENF focuses on retaining new donors after their initial gift by sending an appeal letter to all new donors, as well as making sure they stay in contact with the Foundation. Our goal is to have new donors continue to actively support the Foundation year after year.

The Annual track is the foundation of ENF support. This track encompasses efforts to retain donors each year as well as to reactivate lapsed donors. The ENF strives to establish a pattern of annual giving among all donors, and seeks to increase the number of donors who make multiple gifts in a year. By holding fundraisers or sending an appeal letter to donors your Lodge, you can help keep these donors giving actively each year.

The Major Donor track includes a series of contacts designed to build stronger relationships with our major donors and major donor prospects (donors able and interested in donating larger amounts). A few of these efforts include sending mailings, such as the *Heartbeat* newsletter, the Youth Programs Highlight Book, birthday cards and holiday cards; and sending an end-of-year Annual Statement Report of their tax-year donations. The ENF also recognizes these donors on honor rolls in *Heartbeat*, the Annual Report and online.

The Planned Giving track functions similarly to the prospect track in its goals. It focuses on identification, cultivation and solicitation of planned gift donors. In order to raise awareness about planned giving options, the ENF declares every January to be Planned Giving Awareness month. Donors who plan a gift are at the peak of the donor pyramid because they demonstrate the ultimate commitment to the ENF.

ENF Appeals: Direct Mail

While you meet with donors face to face, hold fundraisers and promote the ENF at events, the ENF office prepares direct mail solicitation letters to segmented groups of donors.

A significant portion of ENF's development efforts involves of a range of direct mail appeals segmented to reach particular target audiences. These appeals mail at different times throughout the year, ask for different donation amounts, and highlight our many programs. Appeal mailings always include a reply coupon and donation envelope, and typically include a special web address for donors who prefer to make an online donation.

All appeals from the ENF will be clearly marked with the Elks National Foundation name and logo. The ENF does not share or sell its mailing list, nor does it include promotional material like t-shirts. Solicitations will be discontinued by request from the donor. All contributions to the Elks National Foundation are voluntary and tax-deductible.

Here's a look at the appeals the ENF office will be mailing in 2011-12 and the donors who will receive them:

- **Annual Pledge Reminders**

Many donors give by pledging to donate in increments over a period of time; for example, a \$100 pledge might be paid at \$10 per year for 10 years. Donors who pledge to give annually and who have not contributed toward their active pledge as of May 31,

will receive a pledge reminder in June. The pledge reminder reply coupon lists the amount pledged, the outstanding balance, and the suggested gift amount.

In September, the ENF sends a follow-up pledge reminder to annual pledge donors who have not responded to their initial reminder—either with a donation or by canceling their pledge—as of August 31. If a donor is completing his/her pledge but wishes to continue receiving reminders to donate, he or she can renew the pledge by checking the appropriate box on the pledge reminder reply coupon.

Pledge reminders are mailed yearly in June until the pledge balance is completed or until the donor notifies the ENF office to cancel his or her pledge. If a donor does not contribute toward his/her pledge for two consecutive years, the ENF will automatically cancel the pledge. (Note: donors will have received four reminders without responding before the ENF cancels their pledge).

- **Non-standard Pledge Reminders**

For pledges with installment schedules other than annual, such as monthly or quarterly, the ENF generates pledge reminders as pledge payments become due. Similar to annual pledges, donors who have not contributed toward their active pledge receive pledge reminders until the pledge is completed or until the donor cancels his or her pledge.

- **11th Billing**

After a donor completes his/her pledge donation, the ENF sends a solicitation letter and reply card inviting them to renew with a new pledge commitment. We call this appeal the 11th Billing. By responding to this appeal, donors will again elect a pledge amount and donation schedule (for example, \$100 over 10 years).

- **Annual Appeal**

An annual appeal mails in June to all active donors who do not have a pledge commitment. The annual appeal serves as a reminder to donors to renew and/or upgrade their gifts to the ENF. It's an important piece in retaining donors and continuing support for our Annual Giving initiative.

- **New Donor Appeal**

Research shows if a new donor donates a second time or more in their first year of giving, they are more likely to repeat their support the next year. Therefore, in an ongoing effort to improve retention rates among new donors, the ENF encourages repeat donations by sending an appeal to donors who made their very first gift during the 2011-12 year. The New Donor Appeal mails quarterly at the beginning of August, November, February and May, to donors who made their first gift during the preceding quarter:

- **Reactivation Appeal**

This appeal targets donors who have not contributed to the ENF in more than a year. Donors whose last donation to the ENF was in 2009-10 will receive this appeal—

meaning they haven't donated in almost two years. It mails in October, letting these donors know we miss them and still need their support. The ENF then sends a follow-up appeal mailing in January to donors who received this Reactivation Appeal in October but who did not respond.

- **Loyalty Club Appeals**

Our Loyalty Club members have donated to the ENF for 10 or more consecutive years. In early February, the ENF sends a reminder to members of the Loyalty Club who have not yet donated this year—if they don't renew their support by March 31, they lose their Loyalty Club status.

Also in February, the ENF sends an appeal to donors who have given for 9 consecutive years but not yet this year. It serves as an invitation for these donors to give again for their tenth consecutive year, earning membership in the ENF Loyalty Club.

- **Leadership Challenge**

Several times throughout the year, the ENF will send reminders to ENF Chairs urging them to participate in the Leadership Challenge. Your annual donation sets an example for the membership to support the ENF.

- **E-Appeals**

Sometimes the ENF will send appeals via email, or e-appeals, at various times throughout the year to constituents who have shown a preference for communicating through email. Topics are timely and directed to those who have shown a previous interest in the given topic. For example, an e-appeal will be sent prior to the Hoop Shoot National Finals to those constituents who have expressed an interest in the program. Recipients can opt-out of email communications at any time by emailing enf@elks.org.

- **ENF Scholar Appeal**

New in 2011-12, the ENF will directly solicit Elks scholarship recipients, both current students and alums, with an appeal in June. These constituents have a special link to the ENF and may choose to support the Foundation as they succeed now and in the future.

E-Philanthropy

The Internet and technology are becoming our greatest fundraising tools. E-philanthropy involves the use of websites, email, social networking and other internet applications to help us cultivate donors. It's more than just online donations!

E-philanthropy means using the Internet and technology to manage a non-profit's fundraising, relationship-building, volunteer and advocacy efforts. It employs several vehicles designed to acquire donors, keep in touch with them and move them up the donor pyramid.

More than 231 million people in the U.S. use the Internet (according to the CIA World Factbook), so it's no wonder e-philanthropy has become the prominent way for non-profits to communicate, develop relationships and fundraise.

It utilizes websites, email, social media sites, online giving, surveys, registration forms, and more. The cost to update and share information electronically, and to donate online, is typically less than that of conventional methods. In addition, the Internet provides a sense of immediacy, allows for efficiency, and displays an organization's commitment to innovation and development.

While e-philanthropy is not intended to replace traditional fundraising efforts, it takes the lead in our philanthropic work, and proves most successful when integrated with the traditional 'offline' fundraising efforts.

The ENF strives to make your role as ENF Chair as easy and successful as possible by providing tools and support throughout the year. Recognizing Lodge, District and State ENF Chairs need different resources based on their different roles, the ENF provides a variety. We hope you make the best use of this manual, reports, supplies and all the information online. Contact the ENF for guidance and advice whenever you're not sure which tool will best meet your needs.

Utilizing Reports and Supplies

The ENF strives to make your role as ENF Chair as easy and successful as possible by providing tools and support throughout the year. Recognizing Lodge, District and State ENF Chairs need different resources based on their different roles, the ENF provides a variety. We hope you make the best use of this manual, reports, supplies and all the information online. Contact the ENF for guidance and advice whenever you're not sure which tool will best meet your needs.

Reports Available to All Members

These reports are available to all Elks members, viewable online, so they may keep aware of ENF fundraising progress. They prove most helpful for ENF Chairs.

- Personal Giving History – lists current-year donations for only the individual logged into the website at the time. Updated once a month.
- Donor Hall of Fame – a special honor roll of all individuals and groups who've donated a cumulative total of \$1,000 or more to the ENF. Searchable by giving level, Lodge, state, or last name. Updated once a month.
- Per-Capita Standings – lists current-year donation totals and per capita, plus per capita of the last three years, for each Lodge and district. Updated weekly.
- Summary of Donations – lists current-year donation totals and per capita for each state and area. Updated once a month.

- Membership Support – demonstrates how Lodges measure up in their district, state, and nationally regarding the percentage of individual members who support the ENF.
- Donor Breakdown – breaks down your Lodge's current-year donors by classification.
- The Leaky Bucket – imagine your donor base to be a bucket of water with a hole in it and helps you see how well you're doing at keeping the bucket full.
- Leadership Challenge Participation Rates – graphically shows participation of Lodge, District and State ENF Chairs, Elks Scholar Advisory Board members, staff and trustees.
- Chair Challenge Standings – lists points earned by each Lodge in the area which represents a well-rounded fundraising effort. Updated weekly.

For Lodge ENF Chairs

Only registered Lodge ENF Chairs can access Lodge Chair Reports when logged onto the website with their *elks.org** username and password. They contain confidential donor information that must be handled with care. Reports are updated online regularly; the date of the most recent information is noted at the top of the page. Some reports with limited disclosure are also available to Lodge Secretaries.

*If you do not have an *elks.org* username and password, go to the Log In screen on the ENF website. Click on the link at the bottom of the login screen that reads "please register now." If you experience a problem with your password, please contact the webmaster via email at webmaster@elks.org.

Reports for Lodge Chairs ONLY

- Record of Donations Report for current year
- History of Donations Report since inception of Lodge
- New Donor Report
- Lapsed Donor Report
- Warning List Report
- New Donor Retention Report
- Custom Reports

Reports for Lodge ENF Chairs and Lodge Secretaries

- Donor ID/Dues Mailing Report
- Donor Category Report

Record of Donations

The Record of Donations report is available online at www.elks.org/enf/chairmen/RecordOfDonations.cfm and is updated weekly. By request, this report can be sent monthly to a Lodge ENF Chair in the mail from August through April. The online report will include annual totals starting from April 1.

This report tracks donations during the current fiscal year from donors in your Lodge, and only lists donors who have given since April 1, 2011. The report lists the donor's name, ID number and cumulative giving recognition level (Participating Member, Honorary Founder, etc.). It then lists each gift received from that donor within this fiscal year, including the type of gift, date received, and the gift amount, along with the annual giving total from each donor. Common gift types include:

Cash: Outright donation.

Pay-Cash: A payment on a pledge.

Pledge: Commitment to donate a specific amount.

Recurring Gift: Monthly gift, usually by credit card or bank draft.

Recurring Gift Pay-Cash: Payment on a recurring gift.

Bequest: A gift received under the terms of a donor's will.

At the bottom of the Record of Donations, you'll find an overall total of your Lodge's donations for the year. These figures are cumulative from April 1. Keep in mind pledge balances, canceled pledges and bequests are not factored into totals used to calculate per capita.

History of Donations

The History of Donations report is available online at www.elks.org/enf/chairmen/HistoryReport.cfm and is updated monthly. It's also available upon request from our office. The report tracks cumulative total donations from active donors who are members of your Lodge. It's a great resource for updating your donor board and your ENF Lodge records.

The third column lists the Lodge membership number of the donor. If this column is blank, we do not have a membership number on record. Please provide missing membership numbers to the ENF office to help update our records.

The fourth column lists the date of the donor's first gift and the fifth column lists the date of the donor's most recent gift. If a donor hasn't given in a few years, it's time to ask them to renew their support.

The sixth column lists their total cumulative donations. This total excludes pledges but includes bequests. The final column lists any remaining balance on pledges. If there is nothing listed in this column, the donor does not have an active pledge.

The purpose of the history report is to reflect total donations from your Lodge's donors. The standard report excludes deceased members, donors who are no longer affiliated with the Elks and donors who haven't made a gift to the ENF in 10 or more years.

The third column lists the Lodge membership number of the donor. If this column is blank, we do not have a membership number on record. Please provide missing membership numbers to the ENF office to help update our records.

The fourth column lists the date of the donor's first gift and the fifth column lists the date of the donor's most recent gift. If a donor hasn't given in a few years, it's time to ask them to renew their support.

The sixth column lists their total cumulative donations. This total excludes pledges but includes bequests. The final column lists any remaining balance on pledges. If there is nothing listed in this column, the donor does not have an active pledge.

The purpose of the history report is to reflect total donations from your Lodge's donors. The standard report excludes deceased members, donors who are no longer affiliated with the Elks and donors who haven't made a gift to the ENF in 10 or more years. These groups can be included upon request. If a deceased member appears on the report, please report back to the ENF because it means our records are not up to date for that donor.

If a donor transfers to your Lodge from another Lodge, the donor's giving total will include all of his or her donations, even those made while a member of another Lodge. Conversely, a donor who transfers from your Lodge will no longer be reflected on this report.

New Donor Report

The New Donor Report is available online at www.elks.org/enf/chairmen/NewDonorReport.cfm and is updated monthly. It lists all the new donors from your Lodge, meaning those who have given their first gift to the ENF during this fiscal year. Use this report to ensure all new donors receive recognition with a red heart pin at a Lodge function. This report is also available for any specified time period upon request.

Lapsed Donor Report

This report is available online at www.elks.org/enf/chairmen/LapsedDonorReport.cfm or at any time upon request. It identifies donors who have lapsed in their support of the ENF—meaning those who are still considered active donors, but who did not donate last year or since. The report includes the donor's name, ENF donor ID number, Lodge membership number, the date of the donor's last gift and the total amount they have contributed to the Foundation.

Warning List

This report is available online at www.elks.org/enf/chairmen/WarningListReport.cfm and updated monthly. It lists donors who are in danger of lapsing in their support of the ENF, meaning those who donated last year but have not yet donated during this fiscal year.

New Donor Retention Report

This sortable report lists last year's new donors who have not yet donated this year. You can see the donor ID number, donor name and membership number. It also lists their first gift date and amount, with any remaining pledge balance. Be sure to encourage these donors to give again this year! Individuals listed on this report will also appear on the Warning List report.

ENF Custom Reports

The ENF can also produce custom reports. Some examples are listed here. If you'd like one of these custom reports, visit www.elks.org/enf/chairmen/OrderEmailReports.cfm to receive an electronic version via email. If you cannot find what you need, please contact the ENF office to explain your request. We will be happy to work with you to create a report that helps.

- **Top 10 Donor Report:** This report identifies the 10 most influential donors from your Lodge. Use this report to give special recognition at an ENF event or to make sure these donors continue their support of the Foundation.
- **SYBUNT Report:** This report identifies those donors who have lapsed in their support to the ENF. It lists donors who donated to the Foundation some year, but not so far this year. It includes whatever contact information we have available for each donor, so you can appeal to them to renew their support.

Donor ID/ Dues Mailing Report

This report lists donors' ID numbers and names. If the ENF has the donor's membership number on record, it will also be listed. Please review the report and provide the ENF with any missing membership numbers, or corrected numbers. Your work with this report helps improve the efficiency of our database.

It is the perfect tool for Lodge Secretaries who need ID numbers for members who contributed with their dues, and it can also serve as a remittance sheet. The last column of the report includes a blank line on which you can write the amount of each donor's recent donation and then mail it to the ENF with the gifts!

Donor Category Report

Maintaining a Recognition Board or adding ENF stickers to membership cards is easy with this report. It lists donors alphabetically according to their cumulative donor level, i.e., Participating Member, Honorary Founder, etc.

For District and State ENF Chairs

District Per Capita – Current Year

This report shows District per-capita figures and total donations for the current year. It includes a list of each Lodge in the district with their Lodge per-capita figures and total donations. You can sort the information by Lodge name, size of membership, total donations or current per-capita figures. Updated once a week.

District Per Capita – Last 3 Years

This report groups Lodges by district. It shows per-capita figures and total donations for the current year, plus the previous three fiscal years, for each Lodge in the district. Look for trends from year to year, and encourage Lodges to increase their giving over previous years. Updated once a week.

Summary of Donations

This report provides information regarding the total donations from each state, the per-capita figures and rankings for both per capita and percentage of GER's goal. The bottom of the report reflects the overall total donations for the period. Updated once a month.

Membership Support

This report demonstrates how each Lodge measures up regarding the percentage of individual members who support the ENF. It measures a Lodge's individual donors as a percentage of its total membership then compares that percentage with the percentages of donor participation for District, State and National. You can sort information in this report in multiple ways. Please note the report excludes donations from organizations within the Lodge. Updated once a week.

Leadership Challenge

This report charts the progress of each group toward reaching our Leadership Challenge goal of 75 percent participation, including Lodge, District and State ENF Chairs, Elks Scholar Advisory Board members, staff and trustees. Updated once a month.

Chair Challenge Standings – Current Year

This report allows you to track Chair Challenge standings. You can view figures by state and size of membership. Click on a specific Lodge to view a breakdown of the score. Results can be sorted by Lodge name, Lodge number, district number, and district composite or composite score. When viewing your score, you can also click on a link that explains our scoring system. Updated once a week.

State Detail Report

This report details total giving by Lodges in the state, sorted by district. The first column lists the Lodge number and Lodge name. The second column lists the number of members in the Lodge as of April 1. Next, the donations, excluding bequests, are

shown. In the fourth column, the per capita for that Lodge is listed. The next column totals bequests from that Lodge, and the last column details the Lodge's total donations. State and District ENF Chairs may request to receive the State Detail Report by mail once a month from August through April.

Supplies

The ENF provides more than a dozen supplies, free of charge, including brochures, promotional material and remittance devices to help you promote the ENF, raise money, and thank donors along the way.

In striving to make your role as ENF Chair as easy as possible, the ENF provides lots of supplies for you and your Lodge free of charge. Each item has its own purpose which helps you maintain a well-rounded approach.

Order supplies online at www.elks.org/enf/SupplyOrders.cfm, or call the ENF office at 773/755-4728 to order by phone.

- Red Heart Pins – These small lapel pins read “Elks National Foundation” and are intended for brand new donors. When someone gives to the ENF for the very first time, award them this pin to welcome them as part of the “Great Heart of Elkdom.”
- Red Heart Stickers – Designed for membership cards, these stickers read “Friend of the ENF” and give extra recognition to donors in your Lodge. As an incentive for members to give annually, award stickers only for donors who have donated this current fiscal year.
- Donor Level Stickers – Another option for membership cards, these stickers recognize donors based on their cumulative giving level. These dollar amount stickers shows levels ranging from \$10 to \$5,000.
- Pin Image Stickers – Yet another option for membership cards, these stickers also recognize donors based on their cumulative giving level. The sticker is a photo image of the recognition pin a donor received at the corresponding level.
- Remittance Packet – Use remittance forms to organize and submit donations to the ENF. This printed packet includes sample forms and instructions on how to properly complete them, along with three different forms for your use: New Pledges forms, for donors starting new pledges; Pledge Payment or Non-Pledge Donation forms, for donors who already have pledges or who don't wish to start one; and Tribute Donations forms, for donations made in memory or in honor of someone.
- Memorial Envelopes – These tribute envelopes make it easy to memorialize or honor loved ones with a gift. Often requested when a cherished member passes away or when someone important deserves an honor.

- Donor Cards – Donor cards allow you to capture all necessary information from your donors, which in turn, helps the ENF provide better service; always have them on hand, especially for reporting new donors.
- ENF Chair Reference Manual – The disk with all the answers... All Lodge, District and State ENF Chairs receive this computer-based reference manual. A printable version of the manual is also available online at www.elks.org/enf. Additional disks for volunteers are available upon request.
- Dues Mailing Buck Slips – Many Lodges ask for contributions to the ENF with their annual dues mailing. Members should be thinking about the ENF when they consider whether to renew their membership. This small, lightweight insert promoting the ENF is easy to include with your dues mailing, and it won't affect the cost of postage.
- ENF Brochure – The “Good Deeds” brochure introduces members to the ENF by answering the question, “What is the Elks National Foundation?” It's perfect for Indoctrination, display at the Lodge, or to include with your Lodge newsletter. This brochure even includes a tear-off donor card!
- Recognition Brochure – Every Elk loves pins, so why not pictures of pins? This brochure explains the ENF's annual recognition program, cumulative recognition program, and recurring gift recognition program. Entice members to reach the next giving level by showing them the benefits they'll receive.
- Give to the ENF Brochure – This brochure, introduced last year, focuses on ways to serve, support and strengthen the ENF and your communities. Let Lodge members know how they can support the Foundation! This brochure also includes a tear-off donor card.
- MVS Brochure – This brochure provides useful information for high school seniors about the Most Valuable Student scholarship contest, such as where to get applications, contest deadlines and how to apply.
- Scholarships for Elks Families Brochure – This brochure contains information about scholarships exclusively available for children and grandchildren of Elks: the Legacy Award and Emergency Educational Grant. Make sure every member is aware of these scholarships. It serves as a reminder of why it's great to be an Elk.
- CIP Brochure – The Community Investments Program brochure gives an overview of grants available to Lodges through the CIP, including Promise Grants, Gratitude Grants and Impact Grants.
- Planned Giving Brochure – Talking to donors about planned giving options isn't always easy; including the ENF in one's estate plans is a significant commitment

with complex pieces. The Planned Giving brochure is a great tool for approaching this sensitive topic with committed donors.

- Magnets – ENF refrigerator magnets are a great way to keep the ENF on the minds of our donors every day. Hand them out at a Lodge event or ENF fundraiser, or include them with a newsletter mailing. The magnets include our website which might inspire somebody to go online to donate.
- ENF Poster – The ENF poster provides a visual overview of ENF-funded programs with lots of photos of program recipients. It's a great promotional piece to hang at the Lodge everyday or to display during special events.
- Grants and Appropriations Flyer* – This glossy brochure explains where ENF distributed its funding for 2011-12. Donors can see the areas in which their donations are making a difference. *This flyer is only available to order while supplies last, but you can access a printable version anytime online at www.elks.org/enf.

Frequently Asked Questions

Q: Why can't I enter the Lodge Chair Only section?

A: You must have a valid elks.org login and password to access the website. You must also be registered as the ENF Chair for your Lodge. If you have a login and still can not view, please contact our office at enf@elks.org, to update your account.

Q: How do I know which members of my Lodge haven't completed their pledges?

A: The last column on your History of Donations report includes any remaining pledge balance. If there is nothing in the last column, the donor has either completed his or her pledge, or the pledge has been canceled per donor request or lack of a response for two years.

Q: When are the online reports updated?

A: Per-capita standings and the Chair Challenge are updated weekly every Friday. The ENF strives to finish processing all donations received the previous month by the fifth business day of the next month. Certain reports are updated monthly online shortly after the previous month gift processing is complete.

Q: What is the difference between cash and pay-cash gifts on the Record of Donations report?

A: Pay-cash gifts refer to payments made toward a pledge. Cash gifts are non-pledge donations.

Q: What should I do about all the deceased members that are on my History of Donations report?

A: If they are listed on your History of Donations report, the ENF does not know they are deceased. Let us know who they are by sending us their names and donor ID numbers, or by copying the report and marking a 'D' next to their name.

Q: What's the difference between a Record of Donations report and a History of Donations report?

A: The Record of Donations report lists those donations from the current fiscal year. The History of Donations report lists total donations from current Lodge members since inception. The online History of Donations does not include deceased or inactive members.

Q: What do I do if there is incorrect information on a report I receive?

A: Let the ENF know immediately. It's important to us that our records are as accurate as possible. ENF staff will correct the mistake as soon as possible after you let us know. You can contact us by emailing enf@elks.org or calling 773/755-4728.

Q: What do I do with my New Donor Report?

A: Use this report to recognize new donors at a Lodge meeting or function with a red heart pin. Donors are more likely to donate again if they feel their gift was appreciated.

Q: What do I do with my Lapsed Donor Report?

A: Use this report to reach out to these donors before it's too late. Often, a donor will stop donating simply because they haven't been asked. Use the former donor sample letter in this manual to ask them for their support.

Q: Can reports be emailed to me?

A: Yes. Reports are available via email at any time. To request a report to be sent to you via email, visit www.elks.org/enf/chairmen/OrderEmailReports.cfm or email us at enf@elks.org.

Fundraising Ideas

Engaging members to donate to the ENF takes time-honored methods plus brand-new ideas. A personal ask; a dinner party; a coin-can collection—however you approach it, your best bet is always promoting our charitable programs. Increased awareness about the good work of the ENF moves people to get involved and donate when you ask.

Need ideas to raise funds? You have so many options...

Indoctrination

*Introduce new members to the ENF from the very start of their membership.
Make it count with stories, brochures, and enthusiasm!*

Get Creative!

Try a new twist on an old idea or a new idea altogether! Your fellow ENF Chairs shared these fundraising tips and suggestions to help spur your creativity.

Lodge/District/State Events

You may plan special events to raise funds for the ENF, but remember to capitalize on events and activities already happening in your Lodge, district, and state.

E-Philanthropy and You

Incorporate technology into your fundraising efforts by collecting email addresses, promoting the website and encouraging online donations.

Check out the website! New fundraiser ideas are available all the time as posted by Lodge ENF Chairs regarding their ENF Month fundraiser. Visit www.elks.org/enf/fundraisingideas.cfm to see more.

If you're wondering what to do with funds once you've raised them or hoping to offer donors more options to donate, look to 'Ways to Give,' the next section of this 'Fundraising and Development' portion of the manual.

Promoting ENF at Indoctrination

Indoctrination is your first opportunity to introduce new members to the ENF, so emphasize the important parts and make it count.

Get excited about telling our story! New members need to learn about the mission and programs of the ENF—when they feel a connection with the great heart of Elkdom, they will support it. Some volunteers in the field have shared these ideas and insights to help you make the most of your Lodge's Indoctrination.

Indoctrination To-Do's:

- Attend every Indoctrination meeting and personally introduce yourself to all new members.
- Prepare a brief presentation about the ENF's mission and explaining why new members should contribute. Remember, they will hear a lot of new information that night, so keep it short and simple.
- If possible, get a list of new members before Indoctrination and mail them a letter and brochure.
- The ENF provided each Lodge with a new DVD video last year, created to introduce members to the Foundation. Each Lodge received a copy of the video in the mail, and it's also viewable on the ENF website. Indoctrination is an ideal time to show it.
- Let new members know the different ways they can get involved with supporting the work of the Foundation, such as volunteering at the local Hoop Shoot or assisting with the scholarship program at the Lodge.
- Pass out brochures, bookmarks or magnets to each new member so they remember the ENF after they leave. Point out the donor card that is included in the brochure.

- Many Lodges contribute an initial \$10 donation for each new member or include this amount for ENF in their initiation fee. Make sure the new donors are aware of this contribution in their name and let them know they'll receive correspondence from the ENF office. Also, check whether or not they intend to start a pledge before doing so.
- Let new members know how they can contact you if they have any questions about the ENF.
- Make yourself available after the Indoctrination to answer any questions new members have regarding the Foundation and how to donate.
- Have a supply of red heart pins and stickers on hand to distribute to anybody who donates on the spot. Let them know that their donation is important to the ENF and people we serve!

Get Creative!

There's no telling what will work for you until you try. These insightful tips and ideas came from fellow ENF Chairs during the 'Share Your Fundraising Ideas' workshop held at Grand Lodge Convention. Fundraising doesn't always mean a big event—read this long list of creative ways to raise awareness and funds for the ENF. If you are attending convention this year, make sure to sign-up for this seminar. Visit www.elks.org/enf for information.

- The best way to generate support is through face-to-face contact! Tell everyone you know about the great programs the ENF supports. Remind them their donations can be invested in the endowment fund where they'll continue to grow year after year.
- A way to gain support for the ENF is through writing. Use your Lodge's newsletter to include up-to-date ENF news and information. Tell members how to get involved; promote the ENF's good deeds; or publicize a specific giving method or recognition program, such as online giving or the new ENF Fidelity Club for recurring givers.
- Leading by example is the way to influence others to give. Set up a challenge campaign at your Lodge. For example, tell people you'll give \$5 for every \$25 they give, or that you will match every \$10 gift for up to 10 gifts.
- Get involved in friendly competition. Partner with another Lodge in your area to battle for the Lodge with the higher per capita by the end of the year. Set the stakes so whichever Lodge loses has to cook dinner for the winning Lodge, or provide some other prize.
- Prominently display ENF brochures and posters so people notice them when they come to the Lodge. Keep a supply of brochures and other materials on hand for people to take home.

- Have a garage sale, bake sale or book sale. Ask members to donate items for the sale then mark items with donors' names. Donate the proceeds to ENF in the donor's name so each individual gets credit and recognition for their gifts.
- Organize an online auction from your Lodge using MissionFish.org. Through MissionFish, you can sell items on eBay while automatically donating to the ENF. Choose for between 10 and 100 percent of the final sale price to benefit the ENF, and MissionFish will make it happen. To learn more, visit www.missionfish.org.
- Collect cans for recycling. Cash them in and send the proceeds to the ENF. You can help Elks build stronger communities and take care of the environment!
- Host a karaoke night and create a "greatest hits" CD from some of the performances. Sell the CD to members and donate the proceeds to the ENF.
- Organize a tournament: anything from golf to bumper or cosmic bowling, darts to "catch the smallest fish" tournaments! Charge an entrance fee, include a raffle, and donate the proceeds to ENF.
- Send letters to Lodge members highlighting the benefits of the Foundation. Include a donor card or a brochure so they can contribute. Try using one of the sample letters located on this resource disk.
- Keep a jar for ENF donations in a popular place in the Lodge, like the lounge or restaurant. On a chart next to the jar, note several benchmarks for the jar collections—\$100, \$250, \$500, etc. For reaching each benchmark, ask the Lodge officers to do something silly.
- Hold a talent show. Get Lodge children involved and you're almost certain to put their parents in the audience. Be sure to charge admission and let everyone know proceeds will support the Elks National Foundation.
- Organize a group of volunteers and spend a weekend or two raking leaves, washing cars or cleaning out garages. Charge your customers a donation to ENF for your services.
- Sell paper hearts or holiday-shaped paper cut-outs with ENF printed on them. Include a space for the donor's name and write it big when someone pays for a heart or shape. Display the hearts/shapes and names somewhere special throughout the Lodge.
- Hold a fashion show with the Lodge's officers dressed as models. Have them wear silly outfits and compete for the funniest hat, most colorful shirt or other fun awards.
- Team up with your Lodge's newsletter editor. Announce at a Lodge function that if a member donates a certain amount or more to the ENF, they will receive an ad in the

newsletter for free! The ad could publicize someone's business; send greetings to loved ones; or sell items collecting dust in the garage.

Promoting ENF at Lodge/District/State Events

You don't have to host your own event to promote the ENF; get involved at events already happening in your area. Lodge functions or district meetings are perfect opportunities to reach potential donors.

Take advantage of these opportunities in addition to your other fundraising efforts. Any time you can mention ENF or raise a few dollars, give it a try! Pass out brochures, share stories with people about the Foundation's good deeds, answer questions, and collect email addresses.

Some ideas for making the most of Elks events:

- Ask local businesses to donate items for a raffle or silent auction at an event or meeting. Offer to put their names in the program. It won't take much time or attention away from the main focus.
- Invite a local scholarship recipient to be a "guest of honor" and speak at an event. Through the Scholar Speaker Program, members can meet one of the beneficiaries of their generosity! The ENF will help you locate a scholar in your area. Email scholarship@elks.org.
- Attend your local Hoop Shoot contest and pass out brochures to parents, school representatives and Elks in attendance. Let people know the Hoop Shoot is sponsored by the ENF.
- Request time during a meeting or event to deliver a short speech about the Foundation or to show the ENF video. Include information on what the ENF has done recently. Remind former donors why they should consider renewing their support. Check out www.elks.org/enf regularly for the latest news.
- At an after-prom party or other youth event, publicize the various ENF scholarships. Have scholarship brochures on hand to pass out.
- Organize a split-the-pot raffle. It can be quick and unobtrusive to sell tickets at the door or during a dinner.
- If your Lodge is hosting a theme party, contribute to the costumes of those people who are generous donors to the ENF. For example, at a Halloween party, pass out pumpkin stickers to all Honorary Founder level donors present.
- Hang an ENF poster or set up an information area where people can see it as they gather. Stay on hand to answer questions.

E-Philanthropy and You

As a volunteer, explore several ways to implement e-philanthropy into your own fundraising strategy. Also, help the Foundation carry out its e-philanthropy successfully by following these actions throughout the year.

1. Collect donors' email addresses. Encourage your members to sign up for *Pulse*, the ENF's monthly e-newsletter. Through *Pulse*, they will receive the latest news and updates on the ENF each month via email. You'll find a *Pulse* sign-up sheet located in the Resources and Reference section of this manual, under Printable Forms. Bring the sheet to Lodge meetings or events, then submit it to the ENF.
2. Promote the ENF Website. Whenever you talk or write about the ENF, be sure to mention the website (www.elks.org/enf). It's full of the most current news and information, photos, helpful links to ENF programs, per-capita standings and much more.
3. Encourage online giving. Donate online with your credit card for the quickest way to give. These gifts take less time to reach the ENF and require no paperwork. Add the donation link (www.elks.org/donate) to your Lodge's website, include it on your email correspondence, and commit it to memory so you can share it in any situation.
4. Use your Lodge's website. If your Lodge, district or state has its own website, do what you can to add the ENF on the home page. It could be a simple link to www.elks.org/enf, a dedicated news column about the ENF, or an honor roll of donors to recognize for their generosity.
5. Send Email. Send mass emails to your members at key times throughout the year alerting them to why and when the ENF needs their support. Send personal messages of gratitude to donors who gave recently. Correspond with the ENF when you have questions or want to submit information for our records.
6. Join social networks! The ENF is now on Facebook and Twitter. It's an abbreviated way to gather news about the ENF and to connect with other people interested in the cause.
7. Read the ENF Blog. Gain insight and entertainment with extended stories and photos from ENF staff about programs and operations.

Helpful Hints for the ENF Website:

- To access the Members Only section of elks.org or the Volunteer section of the ENF website, you must register for an elks.org username and password. If you have trouble registering or logging into elks.org, contact the Webmaster at webmaster@elks.org.
- You must sign up for a separate username and password the first time you donate online at www.elks.org/donate.
- If you forget either your password or username, there is an option to have that information emailed to you. These passwords exist for your safety and security.

If you have trouble with any attempt to donate online, please contact the Foundation at enf@elks.org.

Ways to Give

Donations can seem straightforward, such as a check of \$10 payable to the Elks National Foundation. However, several options exist for supporting the ENF. Very often, a gift belongs to more than one category. For example, an online donation can also be a tribute, and the Named Scholarship Program functions as a pledge or a recurring gift. Therefore, donations aren't always cut and dry.

The most standard/popular way to give is through the Lodge. Members may give to the ENF with their dues, donate during a fundraiser, or hand the Lodge ENF Chair a check at a meeting. In these instances, you'll submit a remittance: a list of donors with their ENF Donor ID, member number or contact information, plus one or many checks .

Annual giving is vital to sustaining the Foundation, as explained in the ENF Fundraising Strategy section of this manual. No matter how donors choose to give, ask them to renew their support every year. The most traditional way to give is a simple, one-time, annual donation. Donors give through a Lodge fundraiser or at a Lodge meeting; they mail checks with a donor card or in a remittance envelope; submit credit card information for a one-time gift over the phone or by mail; or increase their annual dues payment to cover a gift for the ENF.

Designating a gift means the donor chooses which fund to support based on their favorite ENF program. Any donation given via any method may be designated. General gifts go toward the ENF Endowment Fund, which is invested to support all ENF programs. If a donor prefers to support their favorite ENF program instead, the five alternate ENF funds include: Community Investments, Drug Awareness, Hoop Shoot, Scholarships, and Veterans Service.

Familiarize yourself with each of the ways to give. From big to small, simple to complex, understanding the various ways to give helps you recommend the best fit for each of your donors.

ENF Chair Remittances

A remittance is a form or report used to submit donations and donor information to the ENF. As ENF Chair, you collect funds from donors then submit the gifts to the Foundation. Whether you send one check covering multiple donations or several checks from multiple donors, you need to include each donor's information so the ENF can properly credit the gift to that individual or group. You may work with the Lodge Secretary or Treasurer to report accurate information.

As part of Lodge ENF Chair Duties and Responsibilities, the ENF asks that you submit remittances regularly throughout the year. When in doubt about best practices or when dealing with a unique gift, contact the ENF office for help.

Following these tips will help you and the ENF keep accurate and up-to-date records:

- Mail checks with remittance forms to:

Elks National Foundation
2750 N. Lakeview Ave.
Chicago, IL 60614

- Use remittance templates. Remittance forms are a neat and easy way to share donation and donor information when submitting donations to the ENF. Templates of these remittance forms are available in the Resources and Reference area of this manual under the Printable Forms section, or available for order from the ENF office as a Remittance Packet. You can also access them online in the Volunteers section of www.elks.org/enf. The remittance template set-up is formatted as a spreadsheet; it includes a tab for each type of donation, as well as a sample tab for each to show you how to complete the form.
- Use online reports the ENF provides for you. The Donor ID report and the Dues Mailing report both show Donor ID numbers for your Lodge's donors. The History of Donations report shows any outstanding pledge balances. Access these reports in the Lodge Chair Only section of www.elks.org/enf. You can even print the Donor ID report to use as a remittance form!
- Use a Donor Card for new ENF donors and tribute donations. ENF Donor Cards are available online through the supply order form, printable from the Media/Brochures section of the ENF Website, and in the Resources and Reference area of this manual under the Printable Forms section. They can be passed out to donors, or you can keep a supply and fill them out yourself to send to the ENF. These cards are especially helpful to organize new donors and tribute donations, or to help someone start a monthly gift and join the Fidelity Club. Remember, the ENF creates a new record for each new donor, so the more information you provide, the more thorough and accurate our records will be in serving them.
- Provide ENF Donor ID numbers. The ten-digit Donor ID helps ensure the ENF keeps donor records as accurate as possible. If you don't have a donor's ENF ID number, look it up on the Donor ID Report or History of Donations report available to you online. For new donors without a Donor ID, include the donor's membership number, mailing address, and any other contact information you have available.
- The more information the better! If you're unsure of which information or how much information to include with a remittance, then provide as much as you have. "Less

is more” does not apply here! The ENF needs our records to be as complete as possible so we can serve you and our donors best. Including email address, phone numbers and birthday help, too!

- Say no to nicknames. They may be Ed, Jimmy and Bud to you, but according to our records they are Clarence, James and William. Many a duplicate record has been created because the name indicated a new donor. This is also where ENF Donor ID and Lodge membership numbers come in handy – they can help us identify a donor. Feel free to include a nickname in addition to, but not instead of, the donor’s full name.
- Keep it neat. Type remittances if you are able to; otherwise, please print clearly. Easy-to-read paperwork speeds up the time it takes the ENF staff to process your donations and is the best safe-guard against mistakes.
- Be conscious of pledges. Don’t start a pledge for a donor who didn’t ask for it. Keep in mind, the ENF office sends annual pledge reminders to donors with open pledges, and records an outstanding balance for the unpaid portion of a pledge. When a donor receives a reminder for a pledge donation he or she didn’t intend to commit, it’s confusing and a real turn-off to the ENF.
- Explain the tough stuff. Real people open and read the mail you send to the ENF office. If you’re sending a remittance that seems confusing, write a note to clarify and include your contact information so a staff person can follow up if necessary.
- Pay to the Order of? Make sure that check is made out to the Elks National Foundation or ENF. Do not write checks out to Grand Lodge or B.P.O.E.—that’s not us! We can’t cash deposit checks that aren’t ours, just like you can’t deposit checks written to the ENF. Make it simple—instruct your donors to write checks to the ENF not your Lodge.
- Mail it in. Having all of the pieces needed is critical to accurate and efficient gift processing. This means we not only need the check, but we need to know who is to be credited. Please make sure to pass this information along to the Secretary or Treasurer mailing the check. Sending the funds in without the remittance slows processing and adjustments can take 6 – 8 weeks.

Online Donations

Support the ENF quickly and easily anytime from the convenience of your own home or office. In four secure, easy steps, donations arrive to the ENF immediately. Direct your members to donate online by visiting www.elks.org/donate.

When donating online, one must start with a username and password, or select “this is my first online donation.” From there, follow a few easy steps to make a donation with your credit card, or commit to following up with a mailed check donation.

Some important things to know:

- The majority of ENF mailed appeals include a unique web address for donors to use when responding with an online donation. Typing the unique address into one's web browser to donate helps the ENF keep track of what prompted each donation.
- Each online donation can be specifically designated to the general ENF Endowment Fund, or one of five other program funds: Community Investments, Drug Awareness, Hoop Shoot, Scholarships, or Veterans Service.
- To have the donation credited to a donor other than yourself, email enf@elks.org with instructions after making the donation. The personal information submitted in the online gift module must match that of the credit card holder in order to make a successful transaction.
- Online donations can also function as **tribute gifts**, given in memory or in honor of someone special or a special event. Just follow the steps in the giving module to set up a donation as a tribute gift.
- Donors cannot use the same email address for more than one online donor record.
- One's online Donor Profile only shows a history of online donations. Donations given via other methods (such as mailed checks) will not be listed here.
- The credit card expiration date must be four digits with no spaces or slashes. (Ex. 0612 for June 2012).
- Online donations are applied to the donor's ENF donor record and his or her Lodge per capita(if applicable).
- The username and password for online giving is not the same as the username and password used to access the general Elks.org website. You'll receive a unique user name and password when you make your first online donation which you can reuse each time you donate online via www.elks.org/donate.

Tribute Donations

Donors may give to the ENF as a way to memorialize or honor friends and loved ones. These gifts can be submitted in three ways: by mail, online or over the phone with a credit card.

For memorial gifts, donated in a deceased person's memory, an acknowledgement letter will be sent to the donor, to whom the gift is credited. A memorial card will be sent to the person(s) specified (i.e. the survivors) upon request without revealing the gift amount. Please include the name and address of the person to be notified when you make your gift.

For "in honor of" gifts, given to recognize a special person or event, an acknowledgement letter will be sent to the donor, to whom the gift is credited, along with a certificate to present to the honoree. A notification letter will be sent to the honoree so he or she knows a gift was made to the ENF in their honor. Be sure to include the honoree's name and address if you would like the honoree to receive this notification.

For additional information on how to make a tribute gift and what it means for the parties involved, visit www.elks.org/enf/TributeGifts.cfm.

Pledges

Donors may commit to donate a larger amount than the amount given right now, with the remainder donated in increments over a specific period of time. For example, a donor may pledge to donate \$1,000 over ten years, with a \$100 annual gift. The ENF sends reminders to donors for pledge payments as they become due.

To establish a pledge donation, one must provide the following information.

- The total amount of the pledge donation
- The preferred pledge schedule—one of annual, semi-annual, quarterly, or monthly.

Donors can renew completed pledges, essentially recommitting a new gift, by responding to their final pledge reminder, or to the 11th billing appeal mailing.

Pledge donations should only be initiated by request of the donor. If a donor intends to make a one-time donation, please do not enroll him or her for a pledge. When donors receive a reminder for an unintended pledge donation, it's confusing and a real turn-off to the ENF.

The ENF will not establish pledges for donors unless directed to do so.

Recurring Gifts and Fidelity Club

Donors can elect for the ENF to automatically debit their bank account or charge their credit card on a recurring basis for a set donation amount each period. It's safe, reliable, and allows the ENF to spend less time on administration and more time on its charitable mission.

To establish a recurring gift, a donor must complete the enrollment form found online. The enrollment form is also available to you in this manual under Resources and Reference, in the Printable Forms section. When enrolling, donors must select between each of the following options:

- Either the credit card or direct debit option
- Either a monthly or quarterly payment schedule
- The date of the month on which the donation will be deducted, the 15th or the 25th.

Establishing a recurring gift also means becoming a member of the ENF Fidelity Club, a recognition program designed specifically to recognize recurring givers.

Benefits to ENF Fidelity Club include:

- **ENF Fidelity Club Honor Roll.** Donors' names are listed online as long as they are enrolled in the ENF Fidelity Club.
- **ENF Fidelity Club Sticker.** Awarded after the initial donation to display on one's Elks membership card.
- **ENF Fidelity Club Pin:** Awarded after a donor gives 12 recurring gifts.
- **Subsequent Pin Attachments:** Awarded after a donor meets or exceeds one of three giving benchmarks; 25, 50, and 100 recurring gifts. The pin attachments are worn in conjunction with the ENF Fidelity Club Pin.

Payroll deduction donors are also included in the ENF Fidelity Club because their payroll gifts are automatic, scheduled donations, just like a recurring gift.

Read more about the ENF Fidelity Club online at www.elks.org/enf/RecurringClub.cfm.

Payroll Deduction and the Combined Federal Campaign

Some donors have the opportunity to donate to the ENF directly out of their payroll check. It makes giving less impactful on one's budget and automates the process for everyone. Employers with a charitable payroll deduction program take care of the work for you! Encourage members to contact their employer's human resource department to find out if they have a payroll deduction program.

Donors enroll for a charitable payroll deduction through their employer, agreeing to have a pre-determined dollar amount deducted from their wage each pay period. Then, donors elect the dollars to be earmarked for the ENF. Employers are responsible for administering the program and sending the donations directly to the ENF office.

For the ENF to correctly credit payroll gifts to the donor's ENF giving record, the donor's name and address must be included with the payroll donation check. ENF Donor ID numbers or Lodge membership numbers help, too. Employees should advise their employer to include this information for it to be properly submitted to the ENF with the donation check.

The Combined Federal Campaign, or CFC, is an extensive payroll deduction program specific for federal civilian, postal and military employees. These employees can participate in the CFC and select the Elks National Foundation to receive their charitable payroll gift. For more information about the CFC, visit www.opm.gov/cfc or contact Jon Flaherty, ENF Donor Services Associate at 773/755-4862 or email JonF@elks.org.

Payroll deduction donors are also included in the ENF Fidelity Club because their payroll gifts are automatic, scheduled donations, just like a recurring gift. Read more about the ENF Fidelity Club in the previous section of this manual or online at www.elks.org/enf/RecurringClub.cfm.

Matching Gifts

Many companies will double or even triple employees' donations to a charitable organization like the ENF. If an employee or their spouse donates \$100 for example, the company will match the gift to also donate \$100 and sometimes more! Retirees often remain eligible for the Matching Gift Program, too.

All matching gifts are 'soft-credited' to the donor who gave the initial gift, though the company retains acknowledgement for tax purposes. This credit means that matching gifts count toward one's cumulative and annual giving totals as if the donor made the gift to the ENF themselves.

Donors should check with their company's human resources department to find out if it sponsors a matching gift program. They'll have to follow the company's guidelines to participate. Get started by searching for their company here:
www.matchinggifts.com/elks.

Volunteer Match Programs

As an ENF Chair, you commit a lot of time to support the mission of the ENF. Some companies recognize the value of your volunteer service and match it with a monetary donation to the charity you serve. Other volunteers may be eligible too, such as Hoop Shoot or Scholarship Chairs.

Contact your company's human resources department to ask about a Volunteer Match Program, and share the news with other members in your Lodge who serve the mission of the ENF!

To read about matching gifts on our website, visit www.elks.org/enf/MatchingGifts.cfm.

Named Scholarship Program

Encouraging members to consistently give in generous amounts is no easy task, but if they have motivation and the means to give year after year, they will.

Connecting donors to the ENF's mission and the people we serve triggers generosity more than any contest ever could. That's why the ENF offers a special giving opportunity called the Most Valuable Student Named Scholarship Program. This opportunity connects donors with one of the beneficiaries of their generosity: a scholarship recipient. It also helps donors reach their personal giving objectives with the ENF.

The program works like this:

1. Donors **enroll** with a pledge to the ENF Endowment Fund for \$4,000 over four years. Donations do not directly support a single scholarship. You can print an Enrollment Form from this disk.

- The annual donation of \$1,000 can be made in a lump sums or split into installments throughout the four years. Donors can even enroll with a recurring gift as a member of the Fidelity Club.
 - The donor's Lodge receives per-capita credit for the gifts and the gifts count toward the donor's annual and cumulative giving totals.
2. Donors select the **name** of their MVS Scholarship.
 - It can be for their own namesake or in honor or memory of someone special they wish to commemorate.
 - The name of the scholarship appears on all related correspondence and the online MVS Named Scholarship Honor Roll!
 3. The ENF will **pair** each donor with a 2011 Most Valuable Student Scholarship winner when the new class is announced in April.
 - The ENF will select students based as best we can on donor's preferences for location, school or major.
 - The student's scholarship will be named as the donor chooses.

Donors and students keep in touch over the next four years as students share semester updates via the ENF. They're encouraged to correspond throughout the year, and some have even been able to meet in person! Contact the ENF office or visit the website at www.elks.org/enf/NamedScholarship.cfm to learn more about the Named Scholarship program and to view the Honor Roll of current donors.

Planned Giving is vital to the future success of the ENF though it may seem complicated and overwhelming. By helping the ENF acquire planned gift donors, you help secure the future of the Foundation.

Click the buttons at left to learn about planned giving and how you can help spread the word about the importance of planned gifts. Also find printable fact sheets on the most common planned gifts in the Resources and Reference section of this manual, or on the ENF Planned Giving Website (www.enfplannedgiving.org).

Planned Giving

A planned gift to the Elks National Foundation is a great way for donors to demonstrate their commitment to the Elks and to improving Elks communities for generations to come. It's also a great way for donors to leave their legacy to a cause they truly believe in.

Planned gifts include bequests, gifts of appreciated stock or real estate, estate plan gifts, and life income gifts. You'll find fact sheets detailing each of these planned giving options in the Resources and Reference Section of this manual under Printable Forms. A planned gift is the ultimate gift to the Foundation—it is a thoughtful decision to influence the ENF's future. In addition to the satisfaction of having made a difference in the lives of others, a planned gift can also provide donors with tax and financial benefits, such as income, gift and estate tax savings, or supplemental income. A planned gift can make a difference for the Foundation, but also can address concerns about future financial needs and those of a donor's family.

For more information on ENF Planned Giving, visit www.enfplannedgiving.org.

What can I do?

As an ENF Chair, we rely on you to represent the Foundation at your Lodge, and in your district or state. We realize you're not a planned giving expert, and we don't expect you to be!

It's enough to know planned giving options exist and to provide donors with direction to find information. To start, familiarize yourself with these ENF planned giving resources:

- The ENF Planned Giving website, www.enfplannedgiving.org, provides an abundance of planning giving tools, presentations, stories about Elks, and financial information. While on the site, you and your members should enroll for the free monthly Donor e-Newsletter to stay informed about Planned Giving. Direct donors to this website for assistance in choosing the planned gift that is right for them.
- Order the ENF Planned Giving brochure (available through the supply order form) to distribute at your Lodge. The brochure is a great tool for approaching this significant topic with donors.
- Use the planned giving fact sheets located in Fundraising Tools in the Resources and Reference section of this manual. These printable sheets can be used as handouts to interested members or flyers.

If a member of your Lodge expresses more interest in planned giving, simply advise them to contact the ENF office, visit the ENF planned giving website, and discuss their options with their legal or tax adviser.

John F. Malley Society

The John F. Malley Society recognizes individuals who plan gifts to the Foundation. A planned gift can include a bequest, gift of appreciated stock, gift of life insurance, or other life income gifts. Membership benefits include:

- The Malley Society pin.
- The Malley Society medallion.
- Name listed in *Heartbeat*, the ENF donor newsletter; on the ENF website; and in the Foundation's Annual Report.
- Invitation to a special event each year during the Grand Lodge Convention.

To enroll in the John F. Malley society, donors simply need to fill out a one-page application and provide a brief testimonial explaining why they chose to include the Foundation in their plans. The John F. Malley Society application can be accessed under Printable Forms in the Resources and Reference section of this manual, or on the ENF Website at www.elks.org/enf/MalleySociety.cfm.

ENF WEBSITE

As an ENF Chair, one of the most important tools available to you is the Elks National Foundation's website, www.elks.org/enf. It serves as your go-to resource for up to date information, fundraising tools and ENF news.

Visit the ENF website and browse around. You'll find a wealth of information throughout the site; some content was created precisely with you in mind. Important resources you'll find online include:

- Current per-capita and donation totals for your Lodge, district and state.
- Essential reports for Lodge, District and State ENF Chairs. *Visit the Reports section of this manual for detailed information on available reports.*
- ENF information for Lodge, district or state presentations.
- Hundreds of fundraising ideas in the searchable fundraiser database.
- Deadlines and applications for Lodge Grants (Gratitude, Promise and Impact Grants).
- Elks scholarship information including eligibility requirements, applications and submission details.
- Electronic Supply Order Form.
- Remittance Templates.
- Chair Challenge standings and contest information.

The ENF website is a great tool for members, too! Anyone with a valid elks.org user name and password can access ENF news and information, check per-capita reports, view their annual giving history and donate electronically on the ENF website. Encourage members of your Lodge to visit www.elks.org/enf to learn more about the Foundation!

If you have difficulty accessing the website or finding information, please don't hesitate to contact ENF staff for assistance.

DONOR RECOGNITION

The Elks National Foundation encourages you to recognize donors for their generosity, both through ENF recognition programs and your own process. Use the information about annual and cumulative recognition to answer donors' questions and to show members we appreciate their gifts. In this section, you'll learn about our annual and cumulative recognition programs, and our ENF Loyalty Club.

Donors might also receive special recognition within our planned giving society, the MVS Named Scholarship Program, and the ENF Fidelity Club. Read more about these opportunities in the 'Ways to Give' area.

As a volunteer, you can receive special recognition. To learn about the ENF Leadership Pin, visit the Contests/Chair Recognition section of this manual. Also, one exceptional volunteer is featured every month in *ENFrontline*, the volunteer newsletter, and on the ENF website. To recommend an outstanding Lodge, State or District ENF Chair to be featured, contact enf@elks.org or 773/755-4728.

Annual Recognition Program: The Foundation Fellowship



The Elks National Foundation's annual recognition program, named the Foundation Fellowship, is designed to recognize annual giving from individual donors. An annual recognition program strives to create a habit of giving while motivating donors to upgrade their gift amounts during the year. It also provides recognition to donors who give large gifts each year, but are between cumulative donor levels. *For example, a donor may have given a cumulative total of \$7,000. Their next cumulative recognition award is \$3,000 away at \$10,000. If they make a gift of \$1,000 within a given fiscal year, the donor will receive the pins and benefits listed below, separately from the cumulative program.*

The 2011-2012 Foundation Fellowship recognizes six levels of giving ranging from \$100 to \$5,000 for the year. The Leading Knight's charge in the initiation ritual inspired the names for each giving level. Each level represents one of the mythical goddesses of noble virtue who were present at the Olympus feast where Charity appeared. The highest level of the Fellowship, at \$5,000, is Charity, the greatest of all virtues.

Donors receive Foundation Fellowship benefits based on their sum of donations given during the current fiscal year (April 1, 2011, through March 31, 2012). The program restarts at the beginning of each fiscal year. The Justice and Faith pins are printed with the year of the gift, and alternative gifts are available at the Hope level for those who've received the pen set in previous years. Benefits of each level of the Foundation Fellowship are listed in the table on the following page.

Foundation Fellowship Benefits

Benefits:	Levels:					
	Peace \$100+	Justice \$250+	Mercy \$500+	Faith \$1,000+	Hope \$2,500+	Charity \$5,000+
Heartbeat						
Annual Report						
Name in Annual Report						
Justice Pin						
Name in Heartbeat						
Youth Program Highlight Book						
Personal Tour and Lunch (if in Chicago)						
Name in Youth Highlight Book						
Faith Pin						
Engraved Pen Set						
Commemorative Tower						

The ENF mails Foundation Fellowship recognition directly to all eligible donors on a monthly basis. See below for photos of Foundation Fellowship pins and gifts. Or for more information, visit www.elks.org/enf/annualrecognition.cfm.

Note: The Foundation Fellowship *augments*, and does not *replace*, our cumulative recognition program.

Below are sample Foundation Fellowship recognition pieces:



Justice Pin-\$250



Faith Pin-\$1000

Hope Pen Set-\$2,500



Charity Tower-\$5,000



Individual Cumulative Recognition

Our cumulative recognition program thanks donors for their continued support over the years. This program recognizes generous individuals at 10 giving levels, ranging from \$100 to \$100,000. Totals are based on total donations received and are not related to completed pledges. Future intended gifts, such as a pledge balance or a planned gift, do not count toward current donation totals.

The ENF mails cumulative recognition on a weekly basis. Learn more about the cumulative recognition program at www.elks.org/enf/IndividualRecognition.cfm. You can also encourage donors to visit our online Donor Hall of Fame at www.elks.org/enf/donors.cfm. The Hall of Fame lists donors at the Honorary Founder level and up, and is searchable by donor level, Lodge number, state or donor last name. Recognition for each cumulative donor level is detailed in the table below.

Cumulative Recognition Levels

	Level	Recognition Benefit	Recognition Mailed To
	Participating Member (\$100)	Letter of Appreciation Pin Certificate	Sent Directly to Donor
	Sustaining Member (\$250)	Letter of Appreciation Pin	Sent Directly to Donor
	Distinguished Member (\$500)	Letter of Appreciation Pin	Sent Directly to Donor
	Honorary Founder (\$1,000)	Letter of Appreciation Pin Certificate	Letter and Pin to Donor Certificate to Chair
	Permanent Benefactor (\$2,000)	Letter of Appreciation Pin Certificate	Letter and Pin to Donor Certificate to Chair
	Bronze (\$5,000)	Letter of Appreciation Pin Plaque	Letter and Pin to Donor Plaque to Chair
	Silver (\$10,000)	Letter of Appreciation Pin Plaque	Letter and Pin to Donor Plaque to Chair
	Gold (\$20,000)	Letter of Appreciation Pin Plaque	Letter and Pin to Donor Plaque to Chair
	Platinum (\$50,000)	Letter of Appreciation Custom Plaque	Letter to Donor Plaque to Chair
	Diamond (\$100,000)	Letter of Appreciation Custom Gift	Letter to Donor Gift to Chair

We ask Lodge ENF Chairs to help show thanks for the continued support of our generous donors. Therefore, we'll mail recognition certificates and plaques for formal presentation to donors in your Lodge who reach these higher giving levels. Consider acknowledging donors at Lodge, district or state meetings and in your Lodge bulletin or on your Lodge's website.

Order supplies designed especially to recognize your donors. Donor level stickers and "Friend of the ENF" stickers are available to place on the membership cards of all ENF contributors. Also, award red heart pins to new ENF donors! You can order donor recognition brochures, which outline our recognition programs with colorful images. Submit a supply order online at www.elks.org/enf/SupplyOrders.cfm, or submit a printed supply order form by fax or mail.

Loyalty Club



The ENF receives the majority of its donations for amounts less than \$100, meaning many donors don't reach the cumulative or annual donor recognition levels. We want to reward those donors who give year after year, no matter the gift amount, and to encourage other donors to do the same. Therefore, the ENF created the ENF Loyalty Club!

Anyone who donates for **10 or more consecutive years** automatically becomes a member of the ENF Loyalty Club. Members need to continue giving year after year to remain in the club. Recognition for the Loyalty Club is mailed directly to eligible donors each year in the spring, after we close the fiscal year. The benefits include:

- The new Loyalty Club pin
- Donor's name listed in online Donor Honor Roll
- Loyalty Club sticker for their membership card

We hope you'll help promote this special program. You can use our new Loyalty Club pin as an opportunity to bring attention to the dedicated Loyalty Club members in your Lodge. Remember to include these individuals in your Lodge bulletin and ENF board. For those on the cusp of reaching the 10-year consecutive mark, encourage them to make a gift this year and join the ENF Loyalty Club.

To view the ENF Loyalty Club online donor honor roll, visit www.elks.org/enf/loyaltyclub.cfm.

Organization Recognition

The Elks National Foundation has a recognition program specifically designed to recognize Lodge and other groups' donations. This program consists of a series of certificates and plaques, as outlined below. Participating, Sustaining and Distinguished Partner recognition is sent directly to the Lodge or group. Honorary Founder and higher level recognition is sent to the Lodge ENF Chairperson for presentation.

For each of the following levels, the Organization receives a letter of appreciation and a certificate.

Participating Partner (\$100)
Sustaining Partner (\$250)
Distinguished Partner (\$500)
Honorary Founder (\$1,000)
Permanent Benefactor (\$2,000)
Circle of Friends (\$10,000)



The Cornerstone Club

At \$25,000, Lodges and organizations become part of the ENF Cornerstone Club. For each giving level hereafter, Lodges receive one of a series of four square plaques, as seen here. The Cornerstone Club encompasses the four central pillars of the Foundation. Plaques are sent to the Lodge ENF Chair for formal presentation.



Integrity (\$25,000)

Letter of appreciation and Integrity plaque or certificate.

Knowledge (\$50,000)

Letter of appreciation and Knowledge plaque or certificate.

Community (\$75,000)

Letter of appreciation and Community plaque or certificate.

Charity (\$100,000)

Letter of appreciation and Charity plaque or certificate.

CONTESTS AND CHAIR RECOGNITION

Healthy competition motivates ENF Chairs and donors to go beyond their best; it encourages us to rejoice in our successes. As you raise money for the future of the ENF, challenge yourself to do better. Get everyone involved. Your efforts will draw attention!

These contests exist to motivate and recognize your efforts as an ENF volunteer:

Leadership Challenge

Encourages all ENF Chairs, staff and trustees to lead by example with a personal donation to the ENF every year, and encourages all Lodges, districts and states to reach the GER's per-capita goal.

Chair Challenge

Rewards Lodges for having a broad-based fundraising program.

Per-Capita Contests

Recognizes Lodges and states with the highest per-member contribution totals to the ENF by the end of the fiscal year.

All-American Lodge Contest

Honors Lodges that go above and beyond in multiple activities and programs of the Order, including support of the ENF.

Every effort means more attention to the Foundation's mission and more support for its charitable programs. Whether you're trying to outdo yourself or competing with other Lodges, districts and states, entice members to join in and get recognized!

Leadership Challenge

The Leadership Challenge encourages all Lodge, District and State Chairs; Elks Scholar Advisory Board members; ENF staff; and trustees to donate annually to the Elks National Foundation. By donating each year, volunteers and staff lead by example and motivate their constituents to donate to the ENF. The Challenge also encourages all Lodges, districts and states to reach the Grand Exalted Ruler's per-capita goal this year.

The ENF designed the Leadership Challenge in keeping with the Chair Duties and Responsibilities, which requests Chairs to donate annually to the ENF in any amount. It isn't about how much you give, but rather, about setting an example in support of the ENF each year.

This year, the Foundation set a participation goal of 75 percent for each group. The GER will announce his per-capita goal for Foundation support in July 2011 at the Grand Lodge Convention.

Leadership Challenge Recognition

Eligible chairs receive the Lodge, District or State Leadership Pin when they participate in the Leadership Challenge by donating to the ENF, in any amount, during the current fiscal year and when their Lodge, district or state reaches the GER's per-capita goal for 2011-12.

The ENF will send a notification letter to each ENF Chair as they become eligible for the Leadership Pin. The pins are mailed to Exalted Rulers for presentation to Lodge ENF Chairs; to State ENF Chairs for presentation to District ENF Chairs; and to State Presidents for presentation to State ENF Chairs.

You can track the Leadership Challenge progress and view participation rates online at www.elks.org/enf/LeadershipChallenge.cfm. Per-capita standings are updated weekly and available online at www.elks.org/enf/reports.cfm.

Chair Challenge

The Chair Challenge contest rewards Lodges for having a broad-based fundraising program in support of the ENF. The ENF encourages Lodges to recruit new donors, retain recent donors, and reactivate lapsed donors. Beyond these fundraising objectives, Lodges earn participation points for meeting additional goals.

Lodges compete in the following divisions based on membership size:

1. 300 members or less
2. 301 to 500 members
3. 501 to 700 members
4. 701 to 1,100 members
5. 1,101 to 1,500 members
6. More than 1,500 members

Standings are updated weekly and posted on the ENF website in the Reports & Standings section. **For 2011-12, Lodges may earn up to 125 points in the following categories:**

Competitive Categories (90 points maximum)

1. Per-capita Increase: 15 Points maximum

Scoring is based on a per-capita increase over last year's giving divided by last year's per capita. The quotient will be multiplied by 15 to determine the score. Lodges whose per capita has decreased from last year will receive zero points.

$$\frac{(\text{Current-year per capita}) - (\text{prior-year per capita})}{\text{Prior-year per capita}} \times 15 = \text{points allocated}$$

2. New Donors: 15 Points maximum

Scoring is based on the quantity of donors who make their first gift to the ENF during the fiscal year, April 1 to March 31. Lodges earn 0.375 points for each new donor this year.

$$\text{Qty. of New Donors} \times 0.375 = \text{points allocated}$$

3. Retaining New Donors: 10 Points maximum

Scoring is based on the quantity of donors who gave their first gift last year and who donate again this fiscal year. Lodges earn a quarter point (0.25) for every new donor who becomes a second-year donor this year.

$$\text{Qty. of Second-year donors} \times 0.25 = \text{points allocated}$$

4. Renewed Donors: 15 Points maximum

Scoring is based on the quantity of donors who gave to the ENF last year and who donate again this fiscal year, excluding those counted in the Retaining New Donors category. Lodges earn 0.30 points for every renewed donor.

Qty. of Renewed donors x 0.30 = points allocated

5. New Recurring Givers: 10 Points maximum

Lodges earn a half point (0.50) for every donor who enrolls for a recurring gift, joining the ENF Fidelity Club, during this fiscal year.

Qty. of New Recurring Givers x 0.50 = points allocated

6. Donation Frequency: 10 Points maximum

Lodges earn points based on a frequency scale for every donor who gives two or more gifts during this fiscal year. The quantity of donors who give two or more gifts is multiplied by the corresponding point amount for that number of gifts. Scoring is based on the sum of these products according to this formula:

$(2\text{-gift donors} \times 0.67) + (3\text{-gift donors} \times 0.80) + (4\text{-gift donors} \times 0.84) + (5\text{-gift donors} \times 0.88) + (6\text{-gift donors} \times 0.89) + (7\text{-gift donors} \times 0.91) + (8 \text{ or more gift donors} \times 0.95) = \text{points allocated}$

7. Reactivation of Lapsed Donors: 15 Points maximum

Lapsed donors are those who gave prior to one year ago (in 2009-10 or earlier) but not last year (in 2010-11). Lodges earn a fraction of a point (0.60) for every lapsed donor who reactivates their support with a donation this fiscal year.

Qty. of Reactivated Donors x 0.60 = points allocated

Participation Points (35 Points Possible)

1. Meeting the GER's Per-capita Goal: 10 Points

Lodges that meet or exceed the GER's per-capita goal for ENF support this fiscal year earn 10 points. Lodges with support below the per-capita goal receive zero points.

2. ENF Month Lodge Fundraiser: 10 Points

October is ENF Month and we ask all Lodges to hold an ENF fundraiser of their choice. To earn 10 points, a Lodge must submit a Fundraiser Reporting Form detailing the event to the ENF office by January 16, 2012. To submit the report online, visit www.elks.org/enf/chairmen/OctoberFundraiser.cfm.

3. Meeting or Exceeding the National Average in Membership Support: 5 Points
Lodges that meet or exceed the national average in membership participation for ENF support earn 5 points. Participation percentages for Lodge, district and state Membership Support are reported online at www.elks.org/enf/FundraisingAnalytics.cfm.
4. Chairperson Reported to ENF: 3 Points possible
Lodges earn 3 points for registering the Lodge ENF Chair, new or returning, with the ENF online on or before May 2, 2011. Registering online on or before June 1, 2011 earns 2 points, and mailing the Chairperson Agreement to the ENF Office earns 1 point. Register online at www.elks.org/enf/ENFChairmanRegistration.cfm for maximum points!
5. Leadership Donation: 2 Points maximum
Lodges earn 2 points when their Lodge ENF Chair participates in the Leadership Challenge with a personal donation to the ENF this fiscal year.
6. Mystery Points: 5 Points possible
Throughout the year, the ENF will engage Lodge ENF Chairs with quizzes, surveys and/or requests. These opportunities to earn points will come by surprise throughout the year, so stay ready! Be sure to read ENFFrontline each month starting in August, visit the website often, and respond whenever you see mention of a mystery point opportunity.

Get started by earning a Mystery Point today! Earn 1 mystery point in the Chair Challenge by emailing ENF at enf@elks.org on or before March 31, 2012. Include the following information in an email titled 'Manual Mystery Point':

1. Your Full Name
2. Your Lodge Name and Lodge Number
3. Your Elks Membership Number
4. Your Email Address
5. Tell us what you consider the greatest challenge in being an ENF Chair and what you will do, or have done, to handle this challenge

Per-Capita Contests

The Lodge Per-Capita Contest and State Per-Capita Contest recognize Lodges and states with the highest average per-member giving to the ENF by the end of the current fiscal year. (Note that bequests do not count toward per capita).

To determine per capita, the ENF calculates total donations received through March 31, 2012 and divides this total by the number of members. Number of members is determined by Grand Lodge as of April 1, 2011, so fluctuation in membership size throughout the year does not affect per-capita calculations.

Lodges compete in the following divisions based on membership size:

1. 300 members or less
2. 301 to 500 members
3. 501 to 700 members
4. 701 to 1,100 members
5. 1,101 to 1,500 members
6. More than 1,500 members

New Lodges instituted after April 1 have an official per capita of zero (since their membership as of April 1, 2011 was none) and therefore are not eligible to participate in the per-capita contests. However, the ENF provides a special award for the new Lodge with the highest average per-member giving. New Lodge calculations are based on the number of members at the date of their institution.

ENF per-capita standings are updated weekly and always available to members online at www.elks.org/enf/reports.cfm.

All-American Lodge Contest

The All-American Lodge Contest is organized and executed by the Lodge Activities/State Associations Committee, NOT by the ENF.

Success in this contest requires participation in various activities, including support of and donations to the ENF. It recognizes Lodges for going beyond the requirements, for committing hard work and dedication toward the programs of the Order. An All-American Lodge really proves "Elks Care - Elks Share."

In January each year, the Grand Lodge provides an entry form listing all activities for which points are earned. Use the form as a guideline to evaluate what your Lodge accomplished and what it will strive to fulfill in the future. Lodges must complete the form, certify it, and submit it by a certain date for consideration in the contest. National winners are announced at the Grand Lodge Convention in July.

Any questions regarding the contest should be directed to the Lodge Activities/State Associations Committee.

For more information, look for Contest 'A' administered by the Lodge Activities/State Associations Committee online at www.elks.org/grandlodge/lasac/contests.cfm.

ENF PUBLICATIONS

The ENF provides the following publications to our constituents to keep them informed of our activities and news.

ENFrontline

ENFrontline is your monthly volunteer newsletter. Published August through April, it highlights Foundation activities, lists important announcements, and profiles ENF volunteers. You'll often find Mystery Points for the Chair Challenge announced in *Frontline*. Pay special attention to this newsletter; it's a special tool just for ENF Chairs! *ENFrontline* articles also appear on the ENF website at www.elks.org/enf/frontline.cfm. You are encouraged to use the timely information in each issue of *ENFrontline* in Lodge bulletins and newsletters so members stay informed. ENF Chairs may opt to receive a printed version of the newsletter.

Pulse

Pulse, the ENF email newsletter, is sent monthly via email. This e-newsletter is intended for anyone interested in ENF news. It drives members to our website with the latest ENF updates. Donors who've provided us with an email address will automatically receive *Pulse*, or constituents can subscribe to *Pulse* at www.elks.org/enf or on your [Pulse subscription](#) sheet.

Heartbeat

Heartbeat is a quarterly newsletter for the Elks National Foundation's major supporters and friends. It features the Foundation's good deeds by profiling recipients of ENF support and the donors and volunteers who make it possible. Twice a year, this newsletter also lists this year's major ENF contributors.

Annual Report

The ENF's Annual Report includes fiscal year information about the Foundation grants, distributions and expenses, and lists individual and Lodge supporters. The report is mailed to each Lodge and to this year's key ENF supporters. The full report will also be available online.

Youth Programs Highlights Book

This book is sent to Lodges and select donors, and contains information and stories about the ENF's youth-focused programs. Included are lists of scholarship recipients, Hoop Shoot national winners, Drug Awareness Promise Grant communities, and our most generous donors who make these programs possible.

ENF Blog

Go behind the scenes! Visit the new ENF blog to get an inside peek into the ENF, and check out the Elks Community Builder of the Week. Join the conversation today by visiting www.elksnationalfoundationblog.org.

Resources and References

The Resources and Reference section of the 2011-12 ENF Chair Reference Manual allows quick access to a variety of essential forms, information, and tools for ENF Chairs. Resources and Reference serves as a supplement to the Orientation section of this manual and augments the detailed information you've already familiarized yourself with in that section.

GENERAL CONTACT INFORMATION

Staff Contacts

Elks National Foundation
2750 N. Lakeview Ave.
Chicago, IL 60614-2256

Phone: 773/755-4728
Fax: 773/755-4729
Email: enf@elks.org
Website: www.elks.org/enf

Volunteer Services/Development Staff

Kate Keating Edsey, Development Manager
773/755-4866, KateE@elks.org

Erin Rohan, Development Associate
773/755-4858, ErinR@elks.org

Christine Vaccarello, Development Associate
773/755-4956, ChristineV@elks.org

Casey Lehman, Development Coordinator
773/755-4860, CaseyL@elks.org

Who To Call for What

Supplies

If you need ENF supplies, submit an order online at www.elks.org/enf/supplyorders.cfm, or use the Supply Order form in the printable forms section of this manual. You can also call the ENF office at 773/755-4728, or email enf@elks.org for supplies.

Communication Materials

If you need fact sheets, newsletter articles, or other communication tools, contact Kristen Scaletta, Communication Specialist, at 773/755-4864 or KristenS@elks.org.

Recognition

For questions about donor recognition, annual (Foundation Fellowship), cumulative, ENF Fidelity Club and Loyalty Club contact Christine Vaccarello at 773/755-4956 or ChristineV@elks.org.

Donor Services

If you or a donor would like to donate over the phone by credit card or inquire about donor records, call the ENF office at 773/755-4728, or email enf@elks.org.

Scholarship Department

For questions about our scholarship programs, call the ENF Scholarship Department at 773/755-4732, or email scholarship@elks.org.

Programs Department:

For questions about our other ENF programs, including information on applying for Gratitude Grants, Promise Grants and Impact Grants, call our Programs Department at 773/755-4730, or email enfprograms@elks.org.

Fundraising Tools

ENF Video

The ENF video is a great way to inform new and current Elks about the good deeds of the Elks National Foundation.

Use the video at Indoctrination and other Lodge events to introduce new members to the Foundation and renew the support of existing donors. The video runs about seven minutes in length and includes interviews with PGER Ted Hess, Grand Secretary Bryan Klatt, ENF staff, and grateful program recipients. Also included are photos, video footage, and information about all of the ENF programs.

A DVD version of the ENF video was sent to your Lodge last year and should be on file with the Secretary. You can also view the ENF video online:

<http://www.elks.org/enf/mediabrochures.cfm>

ENFrontline

ENFrontline is the monthly volunteer newsletter published from August to April specifically for ENF Chairs. It highlights Foundation activities, lists important announcements, and profiles ENF volunteers. You are encouraged to use the timely information in each issue of *ENFrontline* in Lodge bulletins and newsletters so members stay informed.

ENFrontline issues for 2011-12 can be accessed on the website at www.elks.org/enf/volunteers.cfm. ENF Chairs may opt to receive a printed version of the newsletter.

Reasons for Support

Has someone ever asked you, “Why should I support the Elks National Foundation?” Have you struggled for the perfect answer? For many, the reasons to support the Foundation are obvious. But for some, concrete facts and figures can help persuade them to share generously.

For a more detailed description of the Foundation, its programs, and reasons for support, read our Case for Support, located in the Orientation section of this reference manual, under About ENF and Programs. Below, we’ve included some simple facts and figures to help convince even the most frugal donor that the Foundation needs their support!

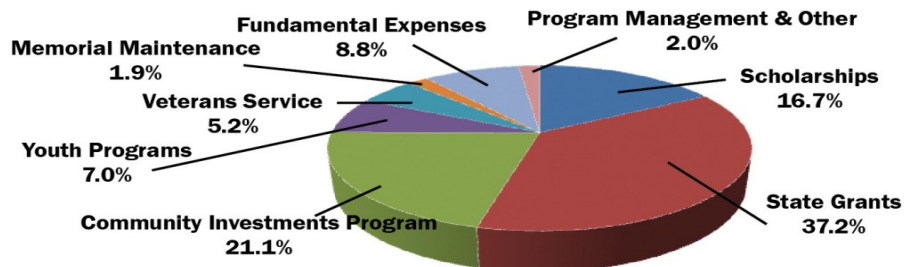
Dollars and Sense

The chart below shows a dollar at work at the ENF, based on our 2011-12 budget of distributions.

Note 37 cents of every dollar goes toward charitable grants to the state associations, 16 cents funds college scholarships, and 21 cents is invested directly in Lodge communities through the Community Investments Program. Those numbers really stand out.

Another number to note is the 11 cents that goes toward the Foundation’s fundamental expenses. According to the Better Business Bureau’s Standards for Charity Accountability, charities should spend at least 65 percent of their total expenses on program activities, or at least 65 cents of every dollar. The ENF spends 89 cents on our programs, more than the BBB’s standard. That’s a fact we should trumpet!

Of course, the relationship between a dollar donated to the ENF and a dollar spent is indirect because every donated dollar goes into our permanent endowment fund, and we only spend the fund’s spendable earnings. Nevertheless, this chart clearly illustrates how the ENF uses your money. With only 11 cents of every dollar going toward administrative expenses, a donation to the Foundation makes great sense.



ENF Scholarships

- Between 2001 and 2010, two million academically qualified students did not go to college because they could not afford it.
- Tuition costs are rising faster than inflation. In fact, college tuition and fees have increased 439% since 1982, but the median family income has only risen 147%.

During the 2011-12 year, the Elks National Foundation allocated \$3.64 million to fund its three scholarship programs and will help more than 2,000 students attend college.

Youth Programs

- One out of five kids has tried marijuana within the past month.
- Every day, 7,000 youth under the age of 16 drink alcohol for the first time.
- Every day, almost 14.3 million kindergarten through 12th-graders take care of themselves after school without adult supervision.
- Youth who are unsupervised during the afternoon hours are at greater risk of committing crime, substance abuse and teenage pregnancy.
- 98 percent of the families of Hoop Shoot national finalists would recommend Elks youth programs to other families.

During the 2011-12 year, the Elks National Foundation allocated \$1,524,625 for Elks Youth programs, including the Hoop Shoot and Drug Awareness Program.

Veterans Service

- Nearly one-quarter of all homeless adults in the United States have served in the armed forces.
- Of the more than 23 million veterans in our country, nearly 40 percent are age 65 or older and nearly 13 percent receive disability compensation.
- Every day, more than 250,000 impoverished, abandoned and hopeless veterans struggle to survive in the country they fought to protect.

During the 2011-12 year, the Elks National Foundation allocated \$1.135 million to fund the activities of the Elks National Veterans Service Commission. The Veterans Service Commission provides care to veterans in hospitals and reaches out to homeless veterans and military families.

Planned Giving Fact Sheets

Bequests



"Drafting a will allowed me to name guardians for my son, Kevin," says Jim O'Kelley, director of the Elks National Foundation. "Including a provision for the Elks National Foundation was an easy decision. I know my gift will be invested in a permanent trust fund and that it will never stop working for the benefit of kids and veterans. That's important to me."

The first step to plan for your personal objectives to occur after your passing is to have a thoughtfully conceived will. A will is a simple but vital tool that allows you to determine the ultimate disposition of your property, and yet 70 percent of adult Americans die without one.

A will allows you to:

- Leave instructions for the transfer of your assets.
- Name a personal representative to handle your affairs and execute your will.
- Name a guardian for your minor children, aged parents, or other legal dependents.

The easiest type of planned gift is a bequest to the Elks National Foundation. Simply add an amendment or "codicil" to your will, naming the ENF as a beneficiary of your estate. You can give cash or specific property, a dollar amount or percentage of your estate, with restrictions or without.

Q & A: Charitable Bequest

What? A charitable bequest is a gift to a charity through a will.

Why? Every adult should have a will, as it ensures that upon your death, your property is distributed as you wish, rather than as the law dictates. A will also allows you to name a personal representative to settle your affairs. If you include a charitable bequest in your will, your estate will likely qualify for an estate tax deduction, helping to preserve your legacy to your heirs.

How? You can leave general, specific, residual and contingent bequests to the Elks National Foundation. Whichever method you select, you should use the following language:

I hereby give, devise and bequeath to the Elks National Foundation Inc., a non-profit organization located at 2750 N. Lakeview Ave., Chicago, IL 60614, ...

Who? A charitable bequest is an easy way for you to leave a meaningful legacy to the future, while possibly reducing your estate taxes, thus preserving your legacy to your heirs.

Please note the information presented here is not intended to be legal or tax advice. Consult your attorney or other professional advisor when considering a planned gift. For more information about planned gift options, visit www.enfplannedgiving.org or contact the ENF at the information listed below.



Elks National Foundation
2750 N Lakeview Ave
Chicago, IL 60614-2256
773/755-4728, enf@elks.org

Estate Plan Gifts



"The Elks and their programs are the best things I have ever been involved with," says Beverly Hamby, Virginia Beach, Va., Lodge No. 2268. "We must make sure that the impact of our good deeds will continue forever." Beverly included the ENF in her will through a gift of life insurance and her 401(k) retirement plan.

Many donors wish to help guarantee the Foundation's future through estate-plan gifts, which have no affect on the donor's current assets. Through proper planning, you can ensure that your assets are distributed according to your wishes and your heirs aren't hit with unexpected estate taxes. Turn surplus life insurance policies into a charitable gift, or designate the ENF as a beneficiary of your retirement plan.

Q & A: Gifts of Life Insurance

What? A donor can contribute a policy to a charity or can name the charity as a primary or contingent beneficiary of a policy.

Why? It is a convenient, easy way to leave a significant gift to the Elks National

Foundation. Many donors have policies that have outlived their usefulness. Also, by naming the Elks National Foundation as a secondary or final beneficiary of a policy, the Foundation will benefit if your primary beneficiaries predecease you.

How? As long as all of the rights of ownership are completely transferred to the Foundation, you receive a current income-tax deduction equal to the lesser of your cost basis or the fair market value of the policy. If you name the Foundation as a beneficiary and it receives the benefit, your estate will receive a charitable deduction, and the death benefit will pass to the Foundation, tax-free.

Who? Donors who own policies they no longer need. Possible examples include business, income-replacement, estate and mortgage insurance. Naming the Elks National Foundation as a contingent beneficiary is an easy way for anyone to include the Foundation in their charitable plans.

Q & A: Retirement Plan Assets

What? A donor can name the Elks National Foundation as a beneficiary of retirement plan assets, such as IRAs or 401(k) plans.

Why? When you designate a charity as the beneficiary of an asset, such as your IRA or retirement plan, the entire value of the asset distributes to the charity free of both federal income and estate tax upon your death. In addition, your estate receives a charitable estate-tax deduction for the gift.

How? It's very easy. Simply advise your plan administrator of your decision and sign whatever form is required. If it's an asset you administer personally, notify the custodian in writing, and keep a copy for your records.

Who? Donors who want to pass less costly assets to their heirs, avoid double-taxation, and potentially increase the amount of their estate that is available to their family.

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773/755-4728, enf@elks.org

Life Income Gifts



"Planned giving is a simple and effective way to support the Foundation for years to come," says PGER Frank Garland of Centralia, Wash., Past Chairman of the ENF Board of Trustees. "I'm proud to help secure the future of the ENF. Knowing my gift will be invested in a permanent trust fund that will never stop working to benefit kids, veterans and Elks communities, gives me a peace of mind."

There are various charitable trust options that pay income to a donor during his or her lifetime, with the remaining assets transferred to charity when the trust term ends. Life-income gifts provide donors with flexibility—you can choose the trustee and investment strategy; the type, amount and timing of payments; as well as the trust beneficiaries.

Q & A: Charitable Remainder Unitrust

- What?** A charitable trust, normally funded by appreciated securities, in which the payout rate is a fixed percentage but the payout is calculated each year based on the net fair market value of the trust.
- Why?** A charitable remainder unitrust guards against inflation as the donor benefits from appreciation of the trust. As the value of the trust increases, so does the payout. Upon creation of the trust, the donor will receive a charitable income-tax deduction and avoid capital-gains taxes.
- How?** The donor transfers appreciated securities to a trust (generally administered by a bank, trust company, or brokerage firm) and receives an immediate income-tax deduction. Payments are based on a percentage (not less than 5 percent and no greater than 50 percent) of the valuation of the trust's assets annually, and can be paid quarterly, semi-annually or annually. The donor can choose one or more charitable organizations to share in the trust principal upon termination of the trust (death or a term of years, not to exceed 20).
- Who?** A donor who wants to increase current income but avoid income, estate and capital-gains taxes on appreciated assets.

Q & A: Charitable Remainder Annuity Trust

- What?** A charitable trust, normally funded by appreciated securities, that guarantees a fixed income stream for the rest of a donor's life.
- Why?** A charitable remainder annuity trust provides the donor with a regular, guaranteed income stream for the rest of the donor's life. In addition, the donor receives an income tax deduction upon the creation of the trust. Furthermore, if the donor funds the trust with appreciated stock, the donor will avoid capital-gains taxes.
- How?** The donor transfers appreciated securities to a trust (generally administered by a bank, trust company, or brokerage firm) and receives an immediate income-

tax deduction, which is based on the payout rate and the donor's age, as well as the age of other beneficiaries. Payments are based on a percentage (not less than 5 percent) of the initial net fair market value of the trust, and can be paid quarterly, semi-annually or annually. The donor can choose one or more charitable organizations to share in the trust principal upon termination of the trust (death or a term of years, not to exceed 20).

Who? Charitable remainder annuity trusts are excellent options for donors 75 or older with estates of \$500,000 or more, as one- and two-life annuity trusts provide a fixed, secure return. However, inflation will erode the value of the fixed payments.

Please note the information presented here is not intended to be legal or tax advice. Consult your attorney or other professional advisor when considering a planned gift. For more information about planned gift options, visit www.enfplannedgiving.org or contact the ENF at the information listed below.



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Outright Gifts



"When you give a gift of stock," says Tedd Bartels, Long Branch, N.J., Lodge No. 742, "the full amount of the stock gets transferred to the ENF. There are no hidden charges, no taxes to pay. The ENF gets the maximum value of your gift. It's a great feeling to know you have done something nice for someone else."

Most outright gifts to the Foundation are gifts of cash. But tax benefits exist for contributing gifts of appreciated stock or real estate, and it's just as easy as writing a check. If you have securities or property that has grown substantially in value, you can give them to the Foundation and not only qualify for an income tax deduction, but also avoid long-term capital-gains tax.

Q & A: Gifts of Appreciated Stock

What? A gift of appreciated stock is a donation of stock that is worth more than its original cost to the donor.

Why? When you give appreciated stock, you are allowed to deduct on your income taxes the fair market value of the stock, which is greater than the actual cost. Plus, you avoid the capital-gains tax. Therefore it is much more economical to donate appreciated stock than cash.

How? Stock can be transferred to the Elks National Foundation in one of two ways. You can have your broker wire the shares to our bank. Or you can physically deliver the stock certificates to us, along with your signature or a stock power. Contact us for more information.

Who? Donors who can contribute either cash or appreciated stock will find that it is to their advantage to donate the stock. Note that with depreciated stock, it is generally better to sell the stock, take the loss, and donate the proceeds.

Q & A: Real Estate

What? With a gift of real estate, the donor transfers or sells the property to a charitable organization.

Why? A donor can avoid capital-gains tax on the sale of real estate by donating the property to a charitable organization. The donor also receives an income-tax charitable deduction for the full fair market value of the gift, based on an independent appraisal.

How? The donor should contact the Elks National Foundation to discuss property transfers. All real estate gifts require approval of the Foundation's gift acceptance committee. For gifts of property, we require a qualified independent appraisal, donor disclosure statement, and environmental review. Because of the time and expense associated with gifts of real estate, the property must normally have an aggregate market value of at least \$25,000.

Who? Donors looking to avoid capital-gains taxes on appreciated property.

Please note the information presented here is not intended to be legal or tax advice. Consult your attorney or other professional advisor when considering a planned gift. For more information about planned gift options, visit www.enfplannedgiving.org or contact the ENF at the information listed below.



Elks National Foundation
2750 N Lakeview Ave
Chicago, IL 60614-2256
773/755-4728, enf@elks.org

Mass Mailing Instructions

Traditional Mail

A mail merge is a word processing function that produces multiple personalized letters or labels by combining a form letter with a data file. You can use the sample letters provided to send an appeal to some or all members of your Lodge, or to the Lodge and District ENF Chairs in your state.

The form letter document you create is the shell used for design. The data file contains the variable information such as names, addresses and giving histories. A mail merge combines one data file and one document to produce the same personally addressed letter for all the records in the data file. In Microsoft Office, the document is typically a Microsoft Word document, and the data file is created in Microsoft Excel. The process creates personalized letters or labels in an efficient, time-saving manner.

The process for generating a mail merge will vary depending on the software and version you are using, but in general, it takes four steps:

1. First, you create the document for your form letter or label.
2. Then, you link the document to a data file.
3. Next, you write your letter, inserting fields from the data file where appropriate.
4. Finally, you merge the data with the document.

If you use Microsoft Office, the help function can provide a mail merge wizard that will guide you through each step.

E-mail Merges

Mail merges aren't just for your traditional mailings anymore – send an e-appeal instead! That's right; you can e-mail all your members at once! Simply send the same message to everyone or personalize it through a mail merge.

The process for generating an e-mail merge will vary depending on your email provider, but in general, it takes three steps:

1. First, create a list of contacts (email addresses) using your email provider.
2. Draft a message to send to the entire list.
3. To send personalized messages, use your word-processing software and a data file to generate an e-mail merge. The bulk of the message will stay the same, but each recipient will see their own name and any other personal info you include, as if you wrote each person an individual message!

The Elks National Foundation can further save you time by providing you with data files for your merge. To request a file or for help with your merge document, contact the ENF at 773/755-4728 or enf@elks.org.

Sample Letters

Many times throughout the year, you will correspond with donors and prospective donors of your Lodge, district or state. The tone, message and means of your correspondence will change with your reasons for contacting these individuals. For example, you may contact donors to thank them for a recent gift to the ENF, or you may appeal to donors who haven't donated in a while to give again.

Face-to-face and personal hand-written correspondences are the two best ways to communicate with your donors and prospective donors. The sample letters provided in this section will help as a base for correspondence, but we encourage you to make each contact with donors and prospective donors as personal as possible.

For help sending letters to multiple people at once, review the Mass Mailing Instructions.

Sample Acknowledgement Letter

<Date>

Mr. Elroy T. Elk
2750 N. Lakeview Ave.
Chicago, IL 60614

Dear Mr. Elk:

Some people make choices that change lives. Thank you for being one of them. Your donation will help change the lives of veterans, students and community members today, tomorrow and for years to come.

Tremendous support from generous donors like you allows the Elks National Foundation to foster incredible programs like the Community Investments Program. For example, this year our Lodge could be eligible to receive up to \$2,000 each for a Gratitude and Promise Grant!

**** Please insert an example of what your Lodge did or can do with a Gratitude Grant. An example is:**

The Chicago-Northshore, Ill. Lodge, used its Gratitude Grant last year to donate to Graffiti Zone, an after-school program which gives at-risk youth a creative outlet and keeps them off the streets. The funds purchased art supplies for the kids, who were able to benefit from the Elks' generosity and dedication to youth programs.

Without your support, the ENF wouldn't be able to give back to Lodges, provide healthy activities for youth, care for our veterans or support our future leaders with scholarships. Thanks again for your generosity. Your gift counts toward both your individual giving level and our Lodge's per-capita goal. Let's keep up the good work!

Sincerely,

ENF Chairperson
BPO Elks Lodge <No.>

Sample General Appeal

<Date>

Mr. Elroy T. Elk
2750 N. Lakeview Ave.
Chicago, IL 60614

Dear Elroy:

The Elks National Foundation has upheld its commitment to helping Elks build stronger communities for nearly 80 years. Our extraordinary donors help students realize their dreams of attending college; provide kids with constructive youth activities; and help the Elks fulfill their pledge to our nation's veterans.

The possibilities are endless, and your help ensures that we can forever build a better tomorrow through our programs. ENF-funded programs serve our community and Elks communities everywhere.

- In the next decade, 6 million qualified students may not go to college because of the immense cost of higher education.
- The amount of after-school programs available today meets only half the demand among parents with children attending elementary and middle school.
- As of September 2010, approximately 2 million World War II veterans are alive and in potential need of care.

These statistics prove we can't ignore the children, families and veterans who need our help. The Foundation's endowment fund provides only a strong base for our philanthropic outreach. Thanks to donors like you growing this base, the Foundation becomes capable of doing more; we strive to accomplish new heights of charity.

Please consider donating to the ENF so we can make a difference in our community. Your contributions will make a difference today and in the future. Thank you for your support.

Sincerely,

ENF Chairperson
BPO Elks Lodge <No.>

Sample Lapsed Donor Appeal

<Date>

Mr. Elroy T. Elk
2750 N. Lakeview Ave.
Chicago, IL 60614

Dear Mr. Elk:

The Elks National Foundation has upheld its commitment to helping Elks build stronger communities for more than 80 years. Our extraordinary donors help students realize their dreams of attending college; provide youth with constructive activities; and help the Elks fulfill their pledge to our nation's veterans.

So many people depend on the Elks National Foundation's benevolence, and they couldn't do so without you! It is only through your generosity that the ENF will distribute \$21.7 million during the 2011-12 fiscal year.

For example, the ENF's Community Investments Program invests directly in Lodge communities to have a lasting impact in the areas where Elks live and work. Lodges know and understand the needs of our community's best, that's why we decide how to use these grants. Last year, Elks hosted dinners for veterans and military families; provided support to local food pantries; and went bowling with teenagers to teach them alternatives to drugs and alcohol. With both Promise Grants and Gratitude Grants worth up to \$2,000 in reimbursement this year, imagine what our Lodge can do!

Remember, Gratitude Grants are awarded based on our Lodge's per-capita donations, so the gift you make will contribute to our chance to make a difference right here in our neighborhood. I hope you'll renew your support of the ENF, so that together, we can keep improving our community. Thank you again for your past support.

Sincerely,

ENF Chairperson
BPO Elks Lodge <No.>

Sample New Donor Acknowledgement

<Date>

Mr. Elroy T. Elk
2750 N. Lakeview Ave.
Chicago, IL 60614

Dear Elroy:

Some people make choices that change lives. Thank you for being one of them! Your donation will help change the lives of veterans, students and community members today, tomorrow and for years to come.

The possibilities are endless, and your help ensures we can forever build a better tomorrow through our programs. ENF-funded programs serve needs present in communities everywhere, including ours.

- In the next decade, 6 million qualified students may not go to college because of the immense cost of higher education.
- The amount of after-school programs available today meets only half the demand among parents with children attending elementary and middle school.
- As of September 2010, approximately 2 million World War II veterans are alive and in potential need of care.

These statistics prove we can't forget the children, families and veterans who need our help. The Foundation's endowment fund provides a strong base for philanthropic outreach. Thanks to donors like you growing this base, the Foundation becomes capable of doing more; we strive to accomplish new heights of charity.

Without your support, the ENF wouldn't be able to give back to Lodges, provide healthy activities for youth, support our future leaders with scholarships, or uphold our pledge to the nation's veterans. Thanks again for your generosity. Your gift counts toward both your individual giving level and our Lodge's per-capita goal. Let's keep up the good work!

Sincerely,

ENF Chairperson
BPO Elks Lodge <No.>

Sample Prospect Appeal

<Date>

Mr. Elroy T. Elk
2750 N. Lakeview Ave.
Chicago, IL 60614

Dear Elroy:

The Elks National Foundation has upheld its commitment to helping Elks build stronger communities for more than 80 years. Our extraordinary donors help students realize their dreams of attending college; provide youth with constructive activities; and help the Elks fulfill their pledge to our nation's veterans.

The possibilities are endless with member support. Your help can ensure that we will forever build a better tomorrow. This is your chance to be a part of something amazing.

For example, the ENF's Community Investments Program invests directly in Lodge communities to have a lasting impact in the areas where Elks live and work. Lodges know and understand the needs of our community's best, that's why we decide how to use these grants. Last year, Elks hosted dinners for veterans and military families; provided support to local food pantries; and went bowling with teenagers to teach them alternatives to drugs and alcohol. With both Promise Grants and Gratitude Grants worth up to \$2,000 each in reimbursement this year, imagine what our Lodge can do!

We need your help! With your donation, you will join a group of donors whose contributions will make a difference today and in the future. You can help a child attend the college of their dreams. You can provide kids with a place to go after school. You can put a smile on the face of a lonely veteran. And you can help improve our community.

Remember, the Foundation depends on support from generous Elks like you to improve communities everywhere. Please consider donating to the ENF, so we can make a difference in our community. Thank you for considering your support.

Sincerely,

ENF Chairperson
BPO Elks Lodge <No.>

Sample Welcome Back Letter

<Date>

Mr. Elroy T. Elk
2750 N. Lakeview Ave.
Chicago, IL 60614

Dear Mr. Elk:

Thank you for renewing your support of the Elks National Foundation. Don't forget, 100 percent of your contribution is now working for the ENF programs to better lives, education and Elk communities!

So many people depend on the Elks National Foundation's benevolence, and they couldn't do so without you! Tremendous support from our donors allows the Elks National Foundation to foster incredible programs like the Community Investments Program. This year, our Lodge could be eligible to receive up to \$2,000 each for a Gratitude Grant and a Promise Grant!

**** Please insert an example of what your Lodge did or can do with a Gratitude Grant. An example is:** The Chicago-Northshore, Ill. Lodge, for example, used its Gratitude Grant to donate to Graffiti Zone, an after-school program that gives at-risk youth a creative outlet and keeps them off the streets. The funds purchased art supplies for the kids, who were able to benefit from the Elks' generosity and dedication to youth programs.

Remember, the Foundation is helping Elks communities everywhere thanks to your donations. Please keep donating to the ENF, so together we can keep improving our community. Thank you again for your support.

Sincerely,

ENF Chairperson
BPO Elks Lodge <No.>

Printable Forms

The following forms are available on the following pages to be printed for your use:

- **John F. Malley Society Application**
- **October Fundraiser Form**
- **Prospect Signup Sheet**
- **Tell Us More Form**
- **Fidelity Club Enrollment**
- **Pulse/Email Signup Sheet**

LEGACY TO THE FUTURE

John F. Malley Society Enrollment Form

Enrollment Instructions:

- Step 1.** Complete the official enrollment form.
- Step 2.** On a separate sheet of paper, include a brief explanation of your reasons for naming the Foundation as a beneficiary of your planned gift.
- Step 3.** Send the enrollment form and your testimonial to the Foundation at the address listed at the bottom of this page.

Lodge State: _____ Lodge No.: _____

DONOR INFORMATION		
Name:	Date of Birth:	ENF Donor ID:
Street Address:		
City:	State:	Zip:
Email:	Phone Number:	Contact me: <input type="checkbox"/> At Home <input type="checkbox"/> Via Email
Spouse Name (if applicable):		
Employer:	Profession:	

GIFT INFORMATION
Type of Planned Gift: (Check the appropriate box below.)
<div style="display: flex; flex-wrap: wrap;"> <div style="width: 50%;"><input type="checkbox"/> Will/Bequest</div> <div style="width: 50%;"><input type="checkbox"/> Appreciated Stock</div> <div style="width: 50%;"><input type="checkbox"/> Life Insurance</div> <div style="width: 50%;"><input type="checkbox"/> Charitable Remainder Unitrust</div> <div style="width: 50%;"><input type="checkbox"/> Real Estate</div> <div style="width: 50%;"><input type="checkbox"/> Retirement Plan</div> <div style="width: 50%;"><input type="checkbox"/> Charitable Annuity Trust</div> </div>
Gift Amount: (optional) _____

OTHER INFORMATION	
Hobbies:	Lodge Activities:

Favorite ENF Program: ☐ Hoop Shoot ☐ Veterans ☐ Scholarships ☐ Drug Awareness
☐ Community Investments ☐ State Grants

Please return this form along with a brief testimonial explaining why you choose to include the Elks National Foundation as a beneficiary of your gift plans to:



Elks National Foundation
 John F. Malley Society
 2750 N. Lakeview Ave
 Chicago, IL 60614-2256



Elks National Foundation October Fundraiser Form

Lodge Name: _____ Lodge Number: _____

Fundraiser Title: _____

Type of Fundraiser (check all that apply)

_____ Athletic outing

_____ Auction

_____ Bingo

_____ Dance

_____ Dinner

_____ Entertainment

_____ Gambling

_____ Picnic

_____ Raffle

_____ Theme Night

_____ Other (please describe) _____

Date(s) of Fundraiser: _____

Description of Fundraiser: _____

Total Amount Raised: \$_____ No. of people in Attendance/Participation: _____

Fundraiser Successes: _____

Fundraiser Weaknesses: _____

Suggestions for other ENF Chairs: _____

Submitted by: _____ Phone No.: _____

Email: _____

Please use additional pages if necessary. Submit to the ENF office by fax (773/755-4729) or mail to:
Elks National Foundation, 2750 N. Lakeview Ave, Chicago, IL 60614-2256.



Elks National Foundation Prospect Collection

Use this sheet to collect information from members of your Lodge who have never donated to the Foundation but who are interested in learning more about it. Completed sheets can be returned to the Elks National Foundation, 2750 N. Lakeview Ave., Chicago, IL 60614 or emailed to enf@elks.org

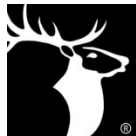
Please print or type.

1. Name: _____ Employer: _____
Spouse: _____ Position: _____
Street Address: _____ Interests/Hobbies: _____
City, State, Zip: _____ Lodge Activities: _____
Phone: _____
Email: _____ Community Activities: _____
Lodge No: _____
Mem. No: _____ College: _____
Birthday: _____ Degree: _____
Elks Affiliation (member, spouse, etc.): _____
Other: _____

2. Name: _____ Employer: _____
Spouse: _____ Position: _____
Street Address: _____ Interests/Hobbies: _____
City, State, Zip: _____ Lodge Activities: _____
Phone: _____
Email: _____ Community Activities: _____
Lodge No: _____
Mem. No: _____ College: _____
Birthday: _____ Degree: _____
Elks Affiliation (member, spouse, etc.): _____
Other: _____

3. Name: _____ Employer: _____
Spouse: _____ Position: _____
Street Address: _____ Interests/Hobbies: _____
City, State, Zip: _____ Lodge Activities: _____
Phone: _____
Email: _____ Community Activities: _____
Lodge No: _____
Mem. No: _____ College: _____
Birthday: _____ Degree: _____
Elks Affiliation (member, spouse, etc.): _____
Other: _____

Tell Us More Forms



Elks National Foundation Wants to Get to Know You!

Name: _____ Lodge No.: _____ Mem. No.: _____

Donor ID (if applicable): _____ Birthday: _____

Lodge activities: _____

Hobbies and Interests: _____

Community Activities: _____

Favorite ENF Program:

☐ Hoop Shoot

☐ Drug Awareness

☐ Community Investments

☐ State Grants

☐ Veterans

☐ Scholarships

Email address to sign up for *Pulse*, our e-newsletter: _____

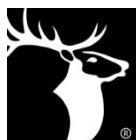
Company Name: _____ Position: _____

College Name: _____ Class of: _____ Major: _____

Spouse's Name: _____

To fill out online, visit www.elks.org/enf/tellusmore.cfm.

Elks National Foundation · 2750 N Lakeview Ave · Chicago, IL · 60614 · enf@elks.org · www.elks.org/enf · 773/755-4728



Elks National Foundation Wants to Get to Know You!

Name: _____ Lodge No.: _____ Mem. No.: _____

Donor ID (if applicable): _____ Birthday: _____

Lodge activities: _____

Hobbies and Interests: _____

Community Activities: _____

Favorite ENF Program:

☐ Hoop Shoot

☐ Drug Awareness

☐ Community Investments

☐ State Grants

☐ Veterans

☐ Scholarships

Email address to sign up for *Pulse*, our e-newsletter: _____

Company Name: _____ Position: _____

College Name: _____ Class of: _____ Major: _____

Spouse's Name: _____

To fill out online, visit www.elks.org/enf/tellusmore.cfm.

Elks National Foundation · 2750 N Lakeview Ave · Chicago, IL · 60614 · enf@elks.org · www.elks.org/enf · 773/755-4728



Elks National Foundation, Inc.

2750 N. Lakeview Ave., Chicago, IL 60614-2256 • (voice) 773/755-4728 • (fax) 773/755-4729 • enf@elks.org • www.elks.org/enf

Fidelity Club Enrollment Form



Donor Name: _____

Donor Address: _____

Lodge No.: _____ ENF Donor ID: _____

Phone Number: _____ Email address: _____

Option 1. Direct Debit

☐ Please draft my bank account* ☐ monthly (\$5 minimum) or ☐ quarterly (\$15 minimum).
(Enclose a voided check for accuracy.)

Bank Draft Start Date (circle one): 15th or 25th

Scheduled Draft Amount: \$ _____

Signature: _____

Option 2. Credit Card

☐ Please charge my credit card ☐ monthly (\$5 minimum) or ☐ quarterly (\$15 minimum).
☐ Visa ☐ MasterCard
☐ Discover ☐ American Express

Scheduled Draft Amount: \$ _____

Acct. No.: _____ Exp. Date: _____

Signature: _____

(Optional): Designate your gift! If you choose not to designate to a program fund, your gift will be invested in the ENF Endowment Fund and distributed to all ENF programs.

☐ Please designate my gift to fund my favorite program (circle one):
Community Investments Drug Awareness Hoop Shoot
Scholarships Veterans Service

*This agreement will remain in effect until the ENF receives written notification of termination.

Quarterly donations will occur every three months after the first gift.

For more information, visit www.elks.org/enf/recurringclub.cfm, or contact the ENF office at enf@elks.org or 773/755-4728.



Elks National Foundation *Pulse* Subscriptions/E-mail Sign-Up

Use this sheet to collect email addresses from members of your Lodge for *Pulse*, our monthly email newsletter. Sign-up sheets specific to your Lodge are available upon request by contacting the ENF at enf@elks.org or 773-755-4728. Or encourage people to sign up for *Pulse* online at www.elks.org/enf.

Please print.

Lodge No. _____

[illegible]

What's New?

In addition to new initiatives at the Foundation this year, the ENF would like to point out some existing points of interest to focus on in 2011-12. These topics need a stronger emphasis in your Elks community.

You may be familiar with some of these items, but it's important to freshen your memory. Browse this section for details about special ENF topics.

TAKE NOTICE

New Donor Cultivation and Renewal

Perhaps a new member to your Lodge gave during Indoctrination? Perhaps a long-time member finally gave his first donation for the ENF? Remember, every new donor you acquire this year should receive special attention.

The ENF has increased its focus on new donors because we don't want to let these folks slip away. Cultivation means building a relationship. You've worked hard to earn their support; a repeat donation from someone who already gave once is easier to acquire than a donation from a new person. If we keep our donors giving again and again, retention rates will soar.

First of all, be sure the ENF office receives their membership numbers, mailing address and email addresses so we can send them a thank you letter for their gift and keep in touch. Remember to recognize these donors with simple gestures such as a sticker for their membership card or an ENF red heart pin. Consider listing new donors in a special section of the Lodge newsletter, bulletin board or website.

Get to know these new donors and help them get to know the ENF. Ask new donors to complete a Tell Us More Form online at www.elks.org/enf/tellusmore.cfm. Learn their interests and share news about corresponding ENF programs with them regularly. Let them know about opportunities to get involved as volunteers to see their dollars at work.

Lastly, don't be afraid to ask new donors to renew their support by giving again this year. A new donor who gives more than once during their first year is much more likely to continue support in future years. Use the New Donor Report to help you identify first-time donors this year.

Alternative Ways to Give

Matching Gifts

Many employers will match gifts given to non-profit organizations by employees and spouses, even if they're retired.

Not only will a matching gift double the impact of a donation, but donors can also receive recognition credit for gifts their employer makes. Be sure the check sent by the employer includes the donor's full name, address and Lodge number if possible. Donors will reach new giving levels based on both their own and their employer's matching donations!

Find out where donors in your Lodge are employed, and check www.matchinggifts.com/elks to see if their company offers matching gifts. If they match gifts, a company's Human Resources Department can provide details about their process and policies. Remember, gifts matched by your donors' employers count toward your Lodge per capita!

To learn more about matching gifts, visit www.elks.org/enf/MatchingGifts.cfm.

Donate While Shopping Online

Give back to the ENF while shopping online! Encourage members to use online transactions as an opportunity to donate to the Foundation.

The Foundation has partnered with American Express, eBay, and three online shopping websites: iGive.com, Missionfish and GiveBackAmerica. Each of these sites offers unique giving options, such as donating credit card reward points, or allocating a percentage of your online purchase to the ENF.

Find out more about donating to the ENF by shopping online at www.elks.org/enf/AlternativeOnlineGiving.cfm.

Publication Recommendations

Featured CIP Projects

The ENF is always looking for Lodge activities to highlight in ENF publications and on our website. If your Lodge uses a Community Investments Program grant, be sure to tell the ENF more about it!

When your Lodge turns in Gratitude Grant, Promise Grant, or Impact Grant reporting forms include details about your event or activity and provide current contact information for the event leader. Please also include pictures, promotional materials, and press coverage of your event.

See the Photo Guidelines in this section of the manual for tips on how to submit quality photos. Your project could be featured in an ENF newsletter, on the Foundation website or blog, or in the Elks Magazine!

To submit photos or publication recommendations electronically, email enf@elks.org with information about your grant project and your Lodge.

Featured Volunteers and Donors

At the ENF, we think our volunteers and donors are the cream of the crop. We feature outstanding donors and volunteers in our publications, knowing their stories will inspire others to give their time and resources to make a difference.

If you know an outstanding ENF Chair or donor, recommend them to be featured in a publication! The Foundation highlights an ENF Chair every month in our *ENFFrontline* volunteer newsletter and on our website. *Heartbeat*, the ENF's quarterly donor newsletter, often includes stories about dedicated ENF donors.

Contact enf@elks.org with your recommendation and any relevant information.

Photo Guidelines

When something exciting happens at your Lodge, the ENF wants to know about it! Did you host an Elks Scholar Speaker or scholar volunteer? Did your members use a Community Investments Program grant to make a difference in your area? Send us photos of your activities, and your Lodge could be profiled in an ENF publication!

Before your event, review these photo guidelines to snap some pictures that truly capture the special moments you create.

- **Storytelling:** A picture is worth a thousand words! Capture the emotions of your subjects, and show action.
- **Subjects:** Always include people, especially those being served.
- **Shots:** Candid shots and action shots are best.
- **Composition:** People should be well-positioned; close-up shots are better than wide, group shots.
- **Main focus:** The main subject should be the focal point. The lighting must be adequate.
- **Background:** Make sure the background is not too busy, as it can take away from the main focus.
- **Types of photos:** Hard copies are accepted, but digital files are preferred. Send the electronic file if possible.
- **Resolution:** Digital images should have a minimum resolution of 1500 by 900 pixels. Set camera to high resolution.
- **Maintain quality:** Photographs should not be paper clipped, stapled or have writing on the back.

Think about the purpose of your activity. Who benefits from the event, and how? Your photos should tell the story of your project.

ENF Video Submission Guidelines

To promote the great work that Lodges are doing across the nation, the ENF is always looking for both photos and videos. We love receiving any news clips you have of Lodge projects, but video submissions don't need to be professional. If your Lodge is shooting its own video, here are some tips to make sure it looks great!

Ten Tips for a Great Home Video

1. Create a story- Set up an establishing shot before you launch into the main activity to set the scene. For example, you can start the video by showing the Lodge members arriving for a special project. Shoot your main footage, and then end with a powerful closing scene, such as a shot of a completed Lodge project.
2. Catch people in action- The beauty of video is that it allows for both motion and sound. Avoid artificial posing.
3. Pay attention to lighting. Make sure the room is well lit, and avoid shooting scenes with an open window in the background. The incoming light puts all subjects in silhouette.
4. Keep track of the audio track. You'll have good audio if you're always less than three feet away from your subject. Do sound tests before shooting, to make sure the volume level is appropriate.
5. Avoid zoom controls at all costs. Zooming in and out while shooting is extremely distracting to viewers.
6. Panning should be done in very slow motion. If you must pan the room, go at a pace 10 times slower than you think is normal.
7. Use a tripod. If a tripod isn't available, use two hands to keep the camcorder steady.
8. Don't focus on any one thing for too long. Capture the essence of the experience by filming in short bursts. Keep your videos short and to the point!
9. Remember the rule of thirds. In Hollywood, cinematographers divide a screen into three vertical columns. Avoid putting your subject in the center of your viewing screen in every shot. Mix it up by having the subject in one of the left or right thirds. This adds character and variety to your shots.
10. Screen your video. Watch your video before submitting it to make sure you've captured what you intended, and that the sound and picture quality is good.

How to Submit a Video to the ENF

We can't wait to see your videos! Here are some ways you can share them with the ENF:

1. Upload the video to YouTube, and send the video link to enf@elks.org.
2. If the file size is less than 2MB, email the video directly to enf@elks.org.
3. For larger files, visit www.yousendit.com to send the video to enf@elks.org for free.

If you have any questions, email us at enf@elks.org or call 773/755-4728. We look forward to receiving footage of your Lodge in action!

NEW IN PROGRAMS

CIP funding doubled for 2011-12

The ENF Board of Trustees has doubled the funding for the Community Investments Program to \$4.6 million from \$2.3 million. In 2011-12, both Gratitude Grants and Promise Grants will double in amount, up to \$2,000 each. The Board also increased the number of available Promise Grants to 500 from 300, helping more Lodges host events that build character and competence in local youth. Impact Grants will continue to range up to \$10,000, giving Lodges the means to significantly strengthen their communities.

Spread the word at your Lodge and apply for a grant! Promise Grant online-only applications will be available on July 1, 2011 and Impact Grant applications will be available on April 1, 2011. Both will be posted at www.elks.org/enf/community/default.cfm. A Gratitude Grant online-only application will be available to your Lodge Secretary after your Lodge reaches the GER's 2011-12 per-capita goal. **In 2011-12, all Promise Grant and Gratitude Grant applications must be submitted online.**

NEW IN DONOR RECOGNITION

New Loyalty Club Pins



After five years of rewarding loyal donors for their continued support, there's a new benefit to being a member of the ENF Loyalty Club. In May 2011, the ENF introduces a new Loyalty Club pin! Donors who've made a gift to the Foundation for 10 or more consecutive fiscal years will receive the Loyalty Club 10-year pin, and donors who've given for 15 or more consecutive years will receive the 15-year pin.

We hope this will help you promote the Loyalty Club at your Lodge. Consider recognizing Loyalty Club donors at a Lodge meeting or special event, and be sure to encourage them to wear their new pin!

Learn more about the ENF Loyalty Club and view the Loyalty Club honor roll at www.elks.org/enf/LoyaltyClub.cfm.

Cumulative Pin Redesign

During 2010-11, you may have noticed that the ENF introduced new pin designs within the Individual Cumulative Recognition program. The Sustaining Member, Distinguished Member and Permanent Benefactor pins have a new look. In 2011-12, the Participating Member and Honorary Founder pins will also feature a new design! The former ENF logo will no longer appear on ENF recognition pieces.

In addition to attractive new pins, the ENF is proud to announce exciting news—with the exception of the red heart pin, all ENF pins will be **made in the U.S.A.** The ENF Board of Trustees and Foundation staff knows that this change exemplifies the patriotism and spirit of the Order, and we hope you'll spread the word to donors in your Lodge!

New Stickers for Membership Cards

After feedback from ENF Chairs and donors that our Donor Level stickers could be more effective, we created a new set of stickers we're calling Pin Image stickers. Like Donor Level stickers, they represent a donor's giving level, but rather than showcasing the dollar amount they've given, they portray the image of the recognition pin associated with each donor level. They are intended to fit on a membership card, and stand out nicely thanks to their vivid color and detail.

Order Pin Image stickers using the ENF online supply order form at www.elks.org/enf/SupplyOrders.cfm, or print and complete the Supply Order form on this disk and mail it to the ENF office.

NEW IN FUNDRAISING

At the ENF, we aim to provide you, our volunteers, with all the information you need to be a fundraiser! An important piece of our job is assembling information about the donors in your Lodge in helpful ways. This year, you'll find three new reports to help you analyze fundraising strengths and weaknesses at your Lodge.

On the Reports and Standings page, we've added two new reports: the Donor Breakdown Report and the Leaky Bucket Report. We've also added a new report on the Lodge Chair Only page: the New Donor Retention Report. Read on to learn how to use each report.

Donor Breakdown Report

The Donor Breakdown Report breaks down your Lodge's current-year donors by classification in four categories. New donors made their first gift to the ENF this year.

Retained new donors made their first gift to the ENF last year, and have made at least one gift this year. Renewed donors made a donation last year, this year, and sometime prior to last year. The majority of your donors will likely fall in the renewed donors category. Reactivated donors have given in the past, did not give last year, but made a donation this year. Use this report to analyze giving patterns in your Lodge. For example, if you gained a lot of new donors this year, consider how you will encourage them to donate again and become retained new donors next year.

Find the Donor Breakdown Report in the Reports and Standing section of the ENF website: www.elks.org/enf/donorbreakdown.cfm.

Leaky Bucket Report

The Leaky Bucket Report equates your Lodge's donor base to a bucket of water with a hole in it. The "leak" refers to former donors who are no longer giving, thus trickling out of your donor base. To keep your bucket full, you'll slow the leak by retaining donors who've given before, and fill the bucket by gaining new donors or reactivating donors who "leaked" from your bucket in the past. Here's how to interpret the categories of this report: Acquired is the number of first-time donors who have contributed since April 1. Reactivated is the number of former donors who did not contribute last fiscal year but have given this year. Add these two together to get the Total Gained for the fiscal year to date. Lapsed is the number of last year's donors who have not yet contributed this year. Subtract Lapsed from Total Gained to get the Net.

Find the Leaky Bucket Report in the Reports and Standing section of the ENF website: www.elks.org/enf/leakybucket.cfm.

Donor Retention Report

Many members donate to ENF once, often at Indoctrination, during a fundraiser, or for some other special reason, and may never give again. Keep these donors engaged with the Foundation and you'll gain more than just a one-time gift! The New Donor Retention Report lists each donor who gave for the first time last year, but who hasn't made a donation yet this year.

Now that you know who they are, consider writing a personal note to each of these donors or chatting with them at the Lodge about an ENF contribution. You'll be glad you did!

Find the New Donor Retention Report in the Lodge Chair Only section of the ENF website: www.elks.org/enf/chairmen/NewDonorRetention.cfm.

NEW IN MEDIA/PROMOTIONS

ENF Webinars

As you probably realize, it's not easy to collect a diverse group of ENF Chairs in one location for a training session. ENF volunteers are busy people, and they're located all over the country! For that reason, the ENF has introduced a series of webinars on different topics to help you understand your job.

What is a webinar?

Short for Web-based seminar, a webinar is a presentation that is transmitted over the Web. Think about a webinar as a way to attend a conference without leaving home. Using your computer, you can hear a presentation and also see the presenter's slides (watching and listening over an internet connection). You won't be able to see the presenter or others attending the program, and they won't be able to see you.

Each ENF webinar is led and narrated by an ENF staff member. You can attend the webinar live the day it's recorded, giving you the option to submit questions to the moderator after the presentation is finished. If you miss the live recording, each webinar is archived on the ENF Volunteers page of our website:

www.elks.org/enf/volunteers.cfm.

All you need to access an ENF webinar is a high-speed internet connection and computer speakers or headphones. Whether you're a new ENF Chair or a long-time expert, we hope you find ENF webinars to be a helpful tool!

ENF Home Page

You'll still find the ENF home page in the same place, at www.elks.org/enf, but you'll notice it has a new look. The main portion of the page cycles through top ENF news stories with vibrant photos. There are also quick links to the Foundation's social media pages and an easy link to donate online. We hope these changes make your visits to the ENF home page even more informative!

Online media

The ENF is on Facebook, Twitter and Youtube, so if you are looking for new ways to connect to the Foundation, log on! And for an insider perspective of the ENF, be sure to check out the new ENF Blog!

Social networking is defined as the use of a website to connect with people who share personal or professional interests. The ENF's involvement in social networking websites like Facebook, Twitter and Youtube provide an opportunity for ENF supporters everywhere to connect with one another. Our blog has a similar purpose. Share ideas, make connections and stay informed about the very latest ENF news by exploring these sites. They are free to use and open to anyone interested in the Elks National Foundation.

Members of your Lodge who participate in social networking will be impressed to find the ENF on the cutting edge of social media with accounts on these websites. As an ENF Chair, we encourage you to visit and explore these sites to stay current.

For the latest ENF media, become a fan of the ENF on Facebook <http://www.facebook.com/#!/ElksNationalFoundation>, follow us on Twitter <http://twitter.com/#!/ElksNtnlFndtn>, subscribe to the Elks National Foundation Youtube channel www.youtube.com/user/ElksNationalFndn, or visit the ENF Blog at <http://www.elksnationalfoundationblog.org/>

Farewell

Thank you for your dedicated time and service as Chair for the Elks National Foundation! We hope this manual proves helpful for you and an easy reference throughout the entire year. Use it often.

Sincerely,

ENF Staff and Development Team