

Elks National Foundation

Chairperson Training Manual 2009-2010



Helping Elks Build Stronger Communities

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It Just Keeps Getting Better!

If you're returning as ENF chair, welcome back and thanks for your continuing hard work for the Foundation. If you're a new chair, welcome to Team ENF. You've picked a great time to join.

2008-09 was another great year for the Elks National Foundation. The hard work of our volunteers made our success possible. With many Lodges losing members, and attendance at Lodge functions declining, today's fundraising environment is tougher than ever. Yet every year, support for the Foundation grows. We want this to continue, and we want to do everything we can to make your job easier. We've developed this training disk to assist you with all your efforts as ENF chair.

This CD contains various information to help you fulfill your chair duties and responsibilities (which are outlined in the [important info and job description folder](#).) Clicking on the links (highlighted words) throughout this document will take you to the various sections as we discuss them. Or, you can navigate to the different sections using Windows Explorer. Let's begin by describing how the CD is organized. We've divided the disk into 19 different folders. Inside the folders, you'll find one to several documents relating to the folder's topic.

The [Case Statement](#) folder, for instance, contains one document outlining our case for support. This document is perfect to obtain an understanding of our mission and programs. Use the document to approach the members of your Lodge with reasons why they should donate to the ENF.

Next is the [Contest](#) folder, which addresses the Chairman's Challenge, Per Capita, and Leadership Challenge contests. The [Development and Fundraising](#) folder features all the information and resources you need to learn about raising funds, upgrading donors, soliciting new donors and preventing donors from lapsing in their support. This folder also contains fundraising [event ideas](#) and [e-philanthropy](#) information, including an [email sign-up](#) sheet.

The [Giving](#) folder highlights the various ways donors can give to the Foundation. It also lists the appeals that the ENF office will send to donors throughout the year. Included in the Giving folder is a list of Reasons to Support the ENF. Keep this information handy for quick reference when answering the important "why should I support the ENF" question from potential donors. The [Programs](#) folder gives detailed information on ENF-funded programs, such as Hoop Shoot, Veterans Service and scholarships, and shows how donations work to benefit program recipients. It also includes information about our Community Investments Program.

The Community Investments Program is a great way to show your Lodge how their donations make a difference locally. Keeping in mind that Elks know the needs of their local community best, the CIP was designed to put the power (and the money) in the hands of the Lodges. This year, the amount of Gratitude Grants and Promise Grants will remain at \$500! We're also in our third year of Impact Grants. These larger, competitive grants are up to \$10,000 and are designed to have a lasting and sustainable impact on your community. This year, the funding pool for Impact Grants is \$500,000. Be sure that your Lodge considers applying for an Impact Grant.

We've explained the function and benefits of our donor recognition process in the [Recognition](#) folder. Use the information on annual and cumulative recognition to answer donors' questions and to show members we appreciate their gifts. In the [Reports](#) folder, you'll find information about all of the reports available to you, and a schedule of when we will send you our standard reports.

On the disk, you'll also find an [ENF Overview](#) PowerPoint presentation. This presentation is the perfect tool to familiarize new members with the Foundation at Indoctrination or other Lodge events. If you want to send a direct-mail solicitation to new members, we've included instructions on how to easily personalize letters using [mail merge](#). To assist with the content of the solicitation, you can utilize the samples we have provided in the [Sample Letter](#) folder for new, prospect and former-donor appeals. We've also included [sample acknowledgement letters](#) for you to thank donors for their generosity.

Other items on the disk include the [ENF flyer](#), [supply order form](#), [ENF logo](#), [remittance template](#) and much more! We hope that you find the information on this disk helpful. Please feel free to contact me if you have any questions, at katee@elks.org or 773/755-4866. Thank you for your commitment to the ENF. We look forward to working with you this year. Together, we know that we can achieve another successful year for the Foundation.

Sincerely,

Kate Keating Edsey
Development Manager

Elks National Foundation
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Volunteer Services/Development Staff:

Kate Keating Edsey, Development Manager

773/755-4866, katee@elks.org

Erin Rohan, Development Assistant

773/755-4858, erinr@elks.org

Christine Vaccarello, Development Assistant

773/755-4956, christinev@elks.org

Supplies:

If you need to order ENF supplies, submit your order online at www.elks.org/enf/supplyorders.cfm, or use the [Supply Order form](#) on this disk. 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 Anne Reardon, Communication Specialist, at 773/755-4864, anner@elks.org.

Recognition:

For questions about donor recognition, annual (Foundation Fellowship) and cumulative, contact Christine Vaccarello at 773/755-4956, christinev@elks.org.

Donor Services:

If you 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 our Scholarship Department at 773/755-4732, or email scholarship@elks.org.

Programs Department:

For questions about our other programs, including information on applying for Gratitude Grants and Promise Grants, call our Programs Department at 773/755-4954, or email enfprograms@elks.org.

Important Dates and Deadlines

2009-10

April

- 25 National Hoop Shoot finals in Springfield, Mass.
- 30 ENF Legacy scholarship winners online at www.elks.org/enf
- 30 ENF MVS scholarship winners published online at www.elks.org/enf

May

- 31 2008-09 Gratitude Grant application deadline

June

- 1 The 2009-10 ENF Chairperson Training Material is online at www.elks.org/enf
- 1 Deadline to submit Chairperson Agreement Form to the ENF for Chairman Challenge bonus points

July

- 1 New and renewal applicants may begin filing for Emergency Educational Grants for the 2009-10 academic year
- 1 Gratitude Grants and Promise Grants applications available online
- 5-9 [Grand Lodge Convention](#) in Portland, Ore.

August

- 1 Monthly ENF Report Mailings begin, including production of ENFrontine
- 15 MVS supplies sent to Lodges
- 31 Impact Grant application deadline

September

- 1 ENF Legacy Awards scholarship contest begins*
- 1 Most Valuable Student scholarship contest begins; Lodges distribute contest materials to high schools*
- 1 MVS scholarship applications available online at www.elks.org*
ENF mails news releases to local newspapers announcing contest and availability of applications at Lodges and online
- 1 Have you started planning for ENF month?
* Visit www.elks.org/enf/scholars for MVS and Legacy Award deadlines.

October

Elks National Foundation Month

- 20 Impact Grant recipients announced
- 23-31 Red Ribbon Week for Elks Drug Awareness Program
- 31 Renewal applications for Emergency Educational Grants due

November **Elks Veterans Remembrance Month**
1 Remember to submit your ENF month [fundraising reporting form](#) to receive 15 points in the Chairman Challenge.

December
31 New applications for Emergency Educational Grants due

2010

January **Planned Giving Awareness Month**
15 ENF Month Fundraising Reporting Form Deadline

February
28 One month until the end of the 2009-10 fiscal year.

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

April
23-26 Hoop Shoot National Finals

ENF Chairperson Job Description

You've seen a portion of this description on your 2009-10 Chairperson Agreement Form. Please take a look at the complete listing of your responsibilities as ENF chair.

Responsibilities:

- A. Demonstrate your support of the ENF by donating each year. *Remember: It's easier to lead by example! See the [Leadership Challenge](#) contest section for details.*
- B. Solicit donations from members of your Lodge, District or State. Pay special attention to former donors and new members of the Order.
- C. Improve your Lodge's, District's or State's per capita from the previous year.
- D. Send at least four remittances a year to the ENF office.
- E. Promote the ENF's mission, case and programs to your constituents. This includes sending appeals, making presentations and holding a fundraiser during ENF month.
- F. Identify prospects from your Lodge. Use the prospect forms in the [Resources](#) section to send the names to the ENF office.
- G. Share relevant information from *ENFFrontline* and reports with donors; recognize donors by reporting on recent donations; present recognition items such as Honorary Founder certificates or Cornerstone Club plaques; present red heart pins to first-time donors; maintain donor recognition board at the Lodge.
- H. Actively promote the Foundation at ENF-sponsored events such as Hoop Shoot or Drug Awareness. These are great opportunities to let the public know about the ENF.
- I. Share ENF reports with the Lodge Secretary and Exalted Ruler as needed.
- J. Provide donors with accurate donor information and serve as liaison to the Foundation to resolve any donor questions or concerns.

You are the ENF's representative in the field. This document details our expectations of you. If you need any help meeting these expectations, do not hesitate to contact us at enf@elks.org. If you would like to know how you're doing, we can provide you with a Performance Analysis that identifies your Lodge program's strengths and weaknesses.

**DDGER Visit—2009-10
Elks National Foundation Requirements**

The following ENF item will be required for your upcoming DD visit:

2009-10 ENF Chairperson Training Disk

- This disk should be shown to all District Deputies. The Lodge will not receive a copy. You can find a printable version online at <http://www.elks.org/enf.volunteers.cfm> under Downloads.

The ENF will no longer send a mailing to Lodge Secretaries to remind them about the requirements for the DD visit. Please share this information with your Lodge Secretary.

Secretary Relations

As outlined in our Donor Bill of Rights, we share individual giving information with as few Lodge members as possible in order to uphold our donors' privacy. As an ENF Chair, you are expected to share reports and information with Secretaries and Exalted Rulers when necessary. Our intent is that this will prevent us from providing full access to this information to more people than is necessary.

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

Electronic Remittances

Lodge Secretaries can submit your Lodge's gifts to the ENF if needed by generating an electronic remittance file. Electronic remittances should be saved as comma-delimited (CSV) or Excel files, 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 of your Lodge and their Donor ID number. This report is helpful when submitting remittances and updating Lodge records. The Donor ID Report is available online at www.elks.org/members/secys/NeoSecyReports.cfm.

Dues Mailing Inserts

We've added an item to our supplies exclusively for Lodge Secretaries—the dues bucksliip. 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, instead of our thicker brochures. Lodge Secretaries can order dues bucksliips, free of charge, at www.elks.org/enf/SupplyOrders.cfm, or by an email to enf@elks.org.

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 reports are updated every week, and they can be sorted by Lodge state, size or district.

Membership Card Stickers

The ENF offers two membership card sticker options. "I'm a Member" stickers are red hearts to mark the card of someone who has given to the ENF, and Donor Level stickers note the cumulative giving level a donor has reached. Stickers are available, free of charge, at www.elks.org/enf/SupplyOrders.cfm, or by an email to enf@elks.org.

Chairman Challenge

The purpose of the Chairman Challenge contest is to reward Lodges for having a broad-based fundraising program. The different scoring categories challenge Lodges to raise money from the various donor groups in their Lodge community.

The scoring categories include:

1. Per-capita Increase
2. Meeting and Exceeding GER's Per-capita Goal
3. New Donors
4. New Pledges/New Recurring Gifts
5. Retaining New Donors
6. ENF Month Lodge Fundraiser
7. Chairperson Reporting Bonus
8. Donor Acquisition Bonus

Scoring Category Descriptions and Point Maximums:

1. Per-capita Increase: 15 Points

Scoring is based on the percent increase over the previous year's per capita. The percentage will be multiplied by 15 to determine the score. **15** is the maximum score. Lodges whose per capita has decreased 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. Meeting and Exceeding the GER's Per-capita Goal: 35 Points

Lodges will earn points based on the following table. **35** is the maximum score. Lodges who do not meet the Per-capita goal will receive zero points.

<u>Range</u>	<u>Points</u>
\$4.50	18
\$4.51 to \$6.00	19
\$6.01 to \$8.00	20
\$8.01 to \$9.50	21
\$9.51 to \$11.00	22
\$11.01 to \$12.50	23
\$12.51 to \$14.00	24
\$14.01 to \$15.50	25
\$15.51 to \$17.00	26
\$17.01 to \$18.00	27

\$18.01 to \$19.00	28
\$19.01 to \$20.00	29
\$20.01 to \$21.00	30
\$21.01 to \$22.00	31
\$22.01 to \$23.00	32
\$23.01 to \$24.00	33
\$24.01 to \$25.00	34
More than \$25.00	35

3. New Donors: 20 Points

Scoring is based on new donors acquired as a percentage of Lodge membership. Percentage will be multiplied by 20 to determine score. The maximum score is **20**.

$$\frac{\text{First-time donors}}{\text{Total members}} \times 20 = \text{points allocated}$$

4. New Pledges/New Recurring Gifts: 15 Points

Scoring is based on new active pledges and new recurring gifts established as a percentage of Lodge membership. The percentage will be multiplied by 15 to determine the score. The maximum score is **15**.

$$\frac{\text{New pledges} + \text{New recurring gifts}}{\text{Total members}} \times 15 = \text{points allocated}$$

5. Retaining New Donors: 15 Points

Scoring is based on the number of first-time donors from the prior year who donate again this year. This number of second-year donors will be multiplied by 25 percent to determine score. The maximum score is **15**.

$$\text{Second-year donors} \times .25 = \text{points allocated}$$

6. ENF Month Lodge Fundraiser: 15 Points

Lodges earn **15** points by holding a fundraiser in October, which is ENF Month. To receive these points, the Lodge must submit a reporting form detailing the event to the Foundation office by January 15, 2010. To submit the report online, visit www.elks.org/enf/chairmen/OctoberFundraiser.cfm.

Bonuses

1. Chairperson Reporting Bonus: 2 Points

Lodges can earn 2 bonus points by reporting their ENF Chairperson to the Foundation office by June 1, 2009.

2. Donor Acquisition: 3 Points

Lodges can earn up to 3 bonus points by increasing the number of new donors acquired over that of the previous year. Use the following table:

Increase of 10 new donors	1 Point
Increase of 15 new donors	2 Points
Increase of 25 new donors	3 Points

Total Possible Points: 120

The top three Lodges in each division receive a plaque from the Lodge Activities/State Associations Committee and the ENF awards certificates for the 4th- through 10th-place Lodges.

Leadership Challenge

Contest Details:

The Leadership Challenge encourages all Lodge, State, and District Chairs, ENF staff and trustees to donate annually to the Elks National Foundation. By donating each year, volunteers **lead by example** and motivate their constituents to donate to the Foundation. We designed the contest based on the Chairperson job description, which requests for chairs to donate annually. We track the Challenge's progress throughout the year and publish the participation rates on our website at www.elks.org/enf/LeadershipChallenge.cfm.

The focus of the challenge isn't *how much* you give, but rather, that you support the ENF each year. This year, we set a participation goal of 75 percent for each group.

Contest Recognition:

Eligible chairs will receive a Leadership recognition pin. The Leadership Pin, which replaced the per-capita pin several years ago, incorporates the per-capita contest with the Leadership Challenge. The ENF awards the Leadership Pin to chairs when their Lodge, District or State reach the GER's per-capita goal and when the Chair has fulfilled their Leadership Challenge criteria by donating during the current fiscal year. Leadership pins will be mailed to Exalted Rulers for presentation to Lodge Chairs; to State ENF Chairs for presentation to District Chairs; and to State Presidents for presentation to State Chairs.

Contests

Per Capita:

The per-capita contest recognizes Lodges with the highest average per-member giving during the current fiscal year. Please note that bequests do not count toward the Lodge's per capita.

Calculations are based on April 1, 2009 Lodge membership figures, therefore Lodges instituted after April 1 are not eligible to participate in the contest and will have an official per capita of zero. However, the Foundation does have a special award for the new Lodge with the highest average per-member giving. The Foundation will calculate the per capita for new Lodges at the end of the Lodge year based on the number of Lodge members on the date of institution.

Lodges compete in the following divisions:

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

The top three Lodges in each division receive a plaque from the Lodge Activities/State Associations Committee, and the ENF awards certificates for the 4th- through 10th-place Lodges.

All-American Lodge Contest:

The Lodge Activities/State Associations Committee organizes and executes the All-American Lodge Contest. However, contest criteria includes participation and donations to the ENF. Any questions regarding the contest should be directed to the committee. For more information on the contest, visit www.elks.org/grandlodge/lasac/contests.cfm.

Introduction to Development and Fundraising

Development isn't easy, but it can be fun! Reaching the GER's per-capita goal requires preparation and planning. It takes hard work—you can't do it haphazardly, and you have to learn to deal with rejection. Baseball players lament that even the best hitters fail two out of every three at bats. To a fundraiser, that ratio sounds pretty good!

Why do we do it? For one thing, it's rewarding. For another, the Foundation could not thrive without it. While fundraising might not be easy, it can at least be made *easier* by following the development process.

There is a logical, orderly discipline to fundraising that, when adhered to, can make your task seem much less daunting. Included on this disk is a description of the [Annual Giving Process](#). In this document, you'll find explanations of basic fundraising principles such as the donor pyramid and case expression. Also included is a list of solicitation strategies, in order of effectiveness.

The ENF Development staff strives to follow this annual giving process. Although our [development plan](#) is slightly tailored for our own donors' circumstances and needs, we follow the pyramid principle with the ultimate goal of moving donors up. Our plan outlines the donors we focus on and the different methods we use to build stronger relationships with them, meeting everyone's needs and expectations.

Next, we'll explore ideas for promoting the ENF at [Indoctrination](#) and other Lodge events. We've also included a list of [fundraising ideas](#) from your fellow volunteers. These ideas worked in real life for some Lodges, and perhaps they will work for you. In addition to the tools provided on this disk, the ENF offers many supplies free of charge that can assist you in your fundraising efforts.

We try to collect fundraising ideas through a [reporting form](#), which you will also find in this folder. If you hold a fundraiser during ENF Month in October, please tell us about it so we can share the idea with other volunteers. If you submit this form by January 15, you earn points for the October Fundraiser portion of the Chairman Challenge contest.

Finally, we've included an [e-philanthropy](#) section. The Internet and email are great fundraising tools. We've composed helpful hints and ideas to help you get the most out of your e-philanthropy efforts, as well as an [email sign-up sheet](#) to get the members of your Lodge more involved.

We hope this folder will help you enjoy your year as an ENF Volunteer. Be creative, and do what works for your Lodge and its donors. And, as always, we welcome your suggestions as to how we can be even more helpful in the future.

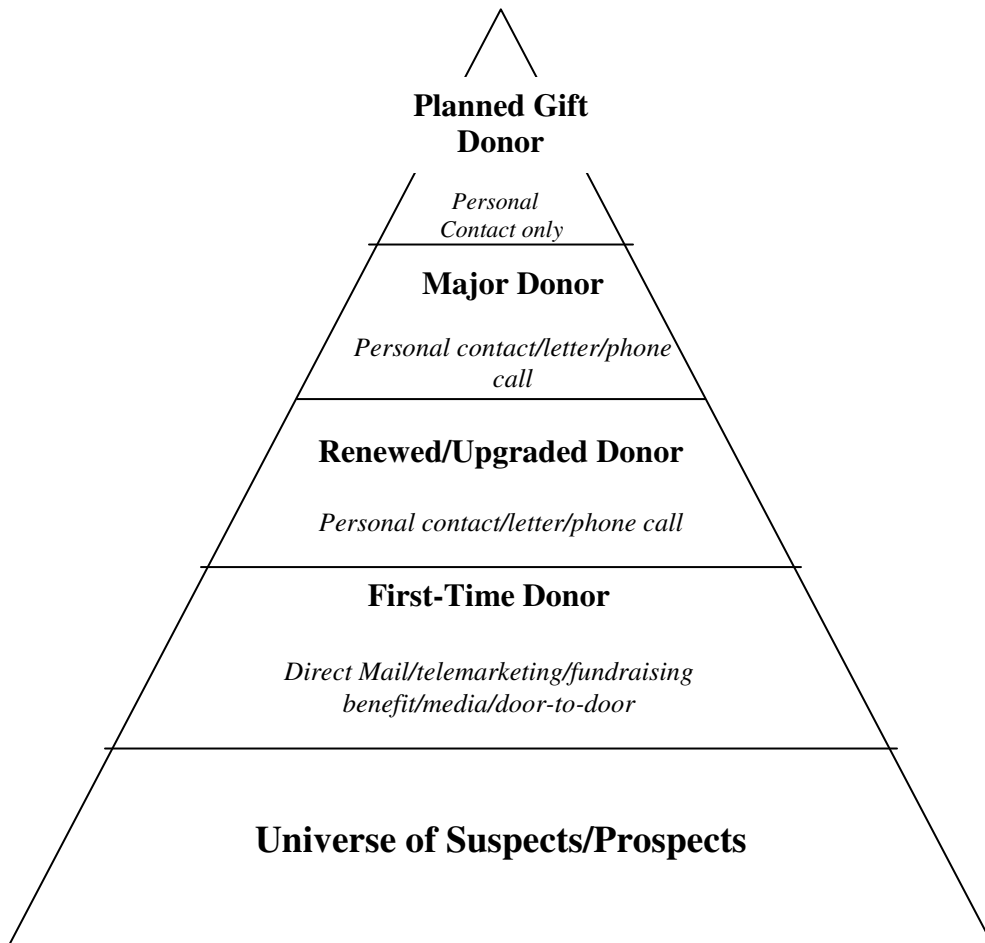
Annual Giving Process

As a volunteer for the Elks National Foundation, you should focus your fundraising efforts on raising money annually. We base all of our goals, contests, and standings on giving within one fiscal year. Therefore, you should base fundraising techniques on developing a pattern of annual giving.

The basic formula for an annual fund program is:

- Get the gift.
- Repeat the gift.
- Upgrade the gift.

The Donor Pyramid represents the donors and prospects in your Lodge. Our goal is to move donors up the pyramid by getting, repeating and upgrading their gifts. Members who have never made a gift are at the bottom of the pyramid. Once a donor makes their first gift, they are on their way up. At the top are those donors who have demonstrated the ultimate commitment to the ENF by including us in their estate plans.



Case Expression

It can be easy to convince a donor to give that first gift to the Foundation. It gets harder when you are trying to convince donors of the importance of multiple gifts or larger gifts. To encourage giving, donors need to know where their money is going and why they need to keep giving. This is called making a case for your cause.

The Case Expression includes:

- Stating a mission and need.
- Identifying who will benefit from the program.
- Specifying resources required.
- Stating how gifts can be made.
- Communicating the benefits of making a gift.

Donors need to feel connected to the cause and need to know their donations are making a difference. Once you have stated your case, it is much easier to appeal to donors for support. [The Case Statement](#) you'll find on this disk contains a detailed case for support for each ENF-funded program, and you can always find current information on our website. Remember, it's important for you to feel connected to the cause, too!

Solicitation Strategies

Now that we've gone over from whom you need to solicit donations and why, we can move on to how. There are many different ways to solicit donations from members of your Lodge. The following lists ways to raise money, starting with the most effective down to the least effective.

1. Personal: face to face.
2. Personal letter (handwritten on stationery).
3. Personalized letter.
4. Telephone solicitation.
5. Impersonal letter/direct mail.
6. Impersonal telephone/telemarketing.
7. Fundraising benefit/special event.
8. Door-to-door.
9. Media/advertising.

You might be surprised to find that special events are not very high on the list. However, this does not mean that they are not beneficial for other reasons. Here are some reasons to hold special events other than for raising money:

1. Publicity.
2. Increase "visibility quotient."
3. Reward or honor donors.
4. Cultivate prospects and donors.
5. Involve other volunteers.
6. Celebrate or recognize achievement.

ENF Development Plan

The Development Department of the ENF focuses on six groups, or tracks. Each track incorporates few to many smaller projects. Below is a summary of each, and how your volunteer efforts play a role. Bear in mind that a single constituent may belong to more than one of these tracks.

The **Prospect** track includes projects designed to attract, identify and communicate with potential new donors. This involves informing them of our programs and highlighting our [case for support](#). We do this 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 never have, you're helping us with this prospect group.

Once a prospect makes his or her first gift, they move on to the **New Donor** track. This track focuses on retaining new donors after their initial gift. We do this 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 these new donors continue to actively support the Foundation year after year.

The **Annual** track is our base of support. It encompasses our efforts to retain donors of less than \$100 a year, as well as to reactivate lapsed donors. Our objective is to increase the number of donors who make multiple gifts in a year and to establish a pattern of annual giving among all donors. By holding [fundraisers](#) or sending an [appeal letter](#) to Foundation members at your Lodge, you can help us ensure these donors remain active 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 sums). Just a few of these efforts include sending mailings, such as the *Heartbeat* newsletter, our Youth Highlight Book, birthday cards, and holiday cards; and sending an end-of-year Annual Statement Report. We also recognize these donors in *Heartbeat*, the Annual Report and on our website.

Our **Planned Giving** track is similar 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, we declare every January to be Planned Giving Awareness month. These donors are at the peak of the donor pyramid since they demonstrate the ultimate commitment to the ENF.

And last but not least, the **E-philanthropy** track focuses on using the Internet and technology to communicate with our donors. Our main projects are E-Appeals, surveys, online giving, and an online donor database. A vital component to the track that we ask of you is [email acquisition](#), so we can communicate with as many donors as possible.

Indoctrination Ideas

Indoctrination is your first opportunity to introduce new members to the Foundation, so take advantage of it! It's important that new members learn about the Foundation's mission and programs before they are asked to donate. Here are some ideas collected from volunteers in the field. Use these to spice up your Lodge's Indoctrination!

- Attend every Indoctrination meeting and personally introduce yourself to all new members.
- The ENF produced a short DVD video to introduce members to the Foundation. Each Lodge should have a copy, and Indoctrination is an ideal place to show it. The video is also viewable on our website.
- Prepare a short presentation explaining the Foundation's mission and why new members should contribute. Remember, they will be hearing a lot of new information at one time. Try to keep it short and simple.
- 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.
- If possible, get a list of new members before Indoctrination and mail them a letter and brochure.
- Make yourself available afterward for any questions new members might have regarding the Foundation and how to donate.
- Let new members know how they can contact you if they have any questions about the ENF.
- 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 us.
- Many Lodges contribute an initial \$10 donation for each new member or include this amount in their initiation fee. Make sure the donors are aware of this (and check to be sure if they intend to start a pledge) before they receive correspondence from our office.
- 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.

Promoting ENF at Lodge Events

You may plan special events to raise funds for the ENF, but you don't necessarily have to plan separate events to promote the Foundation at your Lodge. Lodge functions or meetings are perfect opportunities to reach potential donors. Take advantage of these opportunities! Pass out brochures, answer questions, and share stories with people about the Foundation's good deeds. Here are some simple ways you can remind people about the ENF:

- Have a split-the-pot raffle at a Lodge function. It's a simple and easy way to raise some extra money from your Lodge.
- Attend your local Hoop Shoot contest and pass out brochures. Let people know that the Hoop Shoot is sponsored by the ENF.
- At a regular Lodge event or meeting, deliver a short speech about the Foundation, or show the ENF video. Include information on what the ENF has done recently, and why former donors should consider renewing their support. Be sure to check www.elks.org/enf regularly for the latest news.
- Prominently display ENF brochures so that people notice them when they come to the Lodge. Keep a supply of brochures and other materials on hand for people to take.
- Ask local businesses to donate items for a silent auction at a Lodge event or meeting. This won't take much time or attention away from the main focus, and it is a great way to raise money.
- Invite a local scholarship recipient to be a "guest of honor" at an event. This will allow people to meet one of the beneficiaries of their generosity. Our office can help locate a recipient in your area. Email scholarship@elks.org for assistance.
- At an after-prom party or other youth event, publicize the various ENF scholarships. Have scholarship brochures on hand to pass out.
- 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 Founders present. It's a small thing that will let our donors know that they are appreciated.

E-Philanthropy: More than just donations!

What does e-philanthropy mean to you? Did you guess online giving? You might be surprised to learn that online giving is only a small part of e-philanthropy. Let's talk about the what, why and how of e-philanthropy.

What?

E-philanthropy is the use of the Internet and technology to manage a non-profit's fundraising, volunteer, relationship-building and advocacy efforts.

E-philanthropy is a tool with many vehicles. Some of these vehicles are websites, email, online giving, surveys and event registration. These vehicles are designed to acquire donors, keep in touch with them and move them up the donor pyramid.

Why?

With more than 130 million people in the U.S. using the Internet, it is not only certain that the e-philanthropy revolution is here to stay, but it is changing the way non-profits communicate, fundraise and develop relationships.

The most compelling reason to jump on the e-philanthropy bandwagon is cost. Updating and disseminating information, communicating and giving online all incur minimal costs and time. In addition, the Internet provides a sense of immediacy, allows for efficiency, and displays an organization's commitment to innovation and development.

However, keep in mind that e-philanthropy is not intended to replace traditional fundraising efforts. Fundraising professionals agree that the most successful e-philanthropy practices occur when integrated with offline fundraising efforts.

E-Philanthropy and You

As a volunteer, there are several ways you can implement e-philanthropy into your own fundraising strategy. The first would be to encourage your members to sign up for *Pulse*, the ENF's monthly email newsletter, so they will receive the latest news and updates on the Foundation. You will find a sign-up sheet as a separate document in this folder. Use the sheet at Lodge meetings or events. Other suggestions include:

- Promote the ENF web address for online giving (www.elks.org/donate) on your Lodge's website.
- Display donor honor rolls on your Lodge's website.
- Send mass emails to your members alerting them of why and when we need their support.

What's Available Online for:

Scholarship Students:

- Scholar Web
 - Scholarship News
 - Featured Scholars
 - ENF Scholar Connect

Constituents:

- ENF History and Facts
- Grants and Distributions
- Lodge Giving Totals and per-capita standings
- News and Announcements
- Online Donating
- Planned Giving Information
- *Pulse*, ENF Monthly Email Newsletter
- Testimonials
- Ways to Give
- Recognition Information
- Personal Giving Summaries
- Information about our charitable programs

Volunteers:

- Media/Brochures
- News
- Reports
- Scholarship Information
- Supply Order Forms
- This Handbook!
- *Frontline*, ENF Volunteer Newsletter

Helpful Hints

Passwords:

- 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.

Online Giving: When donating online, start with your username and password. From there just follow a few easy steps to make a donation.

Remember:

- Online donations are applied to your ENF donor record and your Lodge (if applicable).
- Your online Donor Profile only shows your online donations.
- The personal information must match that of the credit card holder in order to make a successful transaction. To have the donation credited to somebody other than yourself, email enf@elks.org after making your donation.
- The credit card expiration date must be four digits with no separations or slashes. (Ex. 0610 for June 2010).
- You must use a separate username and password (not the current username and password you use to access the Elks.org website) to donate online at www.elks.org/donate. You can sign up for a username and password to donate online at www.elks.org/donate.
- You can not use the same email address for more than one online donor record.

Fundraising Ideas

Looking for ways to increase donations from your Lodge? Try these. They've worked for your counterparts at other Lodges, and they might work for you as well!

1. The best way to generate support is through face-to-face contact! Tell everyone you know about the great programs that the Elks National Foundation supports, and that their donations go into the endowment fund where they'll continue to grow year after year.
2. Leading by example is the best way to influence others to give. That's why we established the [Leadership Challenge](#), and it's also a great reason to hold a fundraiser. 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.
3. Sometimes the best way to gain support for the Foundation isn't to hold a special event, but rather to promote the ENF's good deeds in writing. In your Lodge's newsletter, include up-to-date ENF news and information on how to get involved with the Foundation. Use the newsletter to publicize a service of the Foundation, such as the recurring-gift program or online giving. For article ideas, visit www.elks.org/enf or contact enf@elks.org.
4. A little friendly competition can go a long way. Partner up with another Lodge in your area and battle to be the Lodge with the higher per capita at the end of the year. Set the stakes so whichever Lodge loses has to cook dinner at the winning Lodge or provide some other service. Urge your Lodge members to visit www.elks.org/donate and make a donation before midnight on March 31, so that we'll count their gifts toward this fiscal year.
5. Have a garage sale, bake sale or book sale. Mark items with donors' names. Donate the proceeds to ENF in the donor's name.
6. Organize an online auction for your Lodge using MissionFish. Through MissionFish, you can sell an item on eBay and donate from 10 percent to 100 percent of the final sale price to help improve your community. To find out more, visit www.missionfish.org/.
7. Collect cans for recycling.
8. Organize a tournament. Have a night-golf tournament, darts, bumper or cosmic bowling tourney, or a "catch the smallest fish" tournament! Charge an entrance fee, have a raffle, and donate the proceeds to ENF.
9. Send letters to Lodge members highlighting the benefits of the Foundation, and include a donor card. Try the sample letters that are included on this CD.

10. Stick a jar in the Lodge lounge or restaurant. On a chart next to the jar, note several landmarks—\$100, \$250, \$500, etc. For each landmark, ask the chair officers to do something silly.
11. Coordinate an auction. Prizes can be donated by Lodge members, or ask members to donate services like cooking dinner, washing a car, or helping paint a house.
12. Hold a talent show. Sell tickets and have a bake sale at intermission. Ask local companies to donate items for a raffle. Offer to put their names in the program. Get Lodge children involved and you're almost certain to put their parents in the audience.
13. Line up a team 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.
14. Hold a theme event and charge admission, donating part of the ticket price to the ENF. Give out prizes for the best costumes.
15. Sell paper hearts with ENF printed on them and a space for the donor's name. Display the purchased hearts somewhere in the Lodge.
16. Host a potluck dinner and charge a small admission fee.
17. Invite a scholarship winner from your area to speak at the Lodge. Serve refreshments afterward and donate the proceeds to the ENF.
18. 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.
19. Host a karaoke night and create a "greatest hits" CD from some of the performances. Sell the CD to Lodge members and donate the proceeds to the ENF.
20. Organize a walk-a-thon around your town and ask participants to collect pledges for the event.
21. For a creative incentive for members of your Lodge to donate, 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.

ENF Giving Methods

Listed below are methods for supporting the Elks National Foundation. Donations are payable by check, Visa, MasterCard, Discover or American Express. Donors can also choose to have their checking account debited on a regular basis.

Annual Giving: Many donors support the Foundation with one-time donations year after year.

Pledge: To establish a pledge, a donor must provide the following information.

- Total amount of the pledge
- Pledge schedule choice

A donor can choose to receive a pledge reminder following one of these pledge schedules—annual, semi-annual, quarterly, and monthly. Donors can also renew completed pledges with their response to their final pledge reminder, through our 11th billing mailing or by contacting our office.

Online Donations: Donors can support the ENF anytime from the convenience of their own home or office. In four secure, easy steps, donations begin working immediately to improve the lives of program recipients. Donors can access online giving by visiting www.elks.org/donate.

Tribute: Donors may contribute to the Foundation by mail or online to memorialize or honor friends and loved ones. “In memory of” contributions are credited to the donor’s record and notification of the gift is sent to the family or loved ones upon request. “In honor of” gifts are also credited to the donor, who receives a certificate to present to the individual being honored. For additional information on how to make a tribute gift, visit www.elks.org/enf/TributeGifts.cfm.

Corporate Gifts: Donors can involve their employers in the philanthropic spirit of the Elks. Many companies will match gifts given to charitable organizations by their employees and spouses, even if they’re retired. Donors should check with their company’s H.R. office to find out if it sponsors a matching gift program.

Payroll Deduction: A donor may be able to sign up for a payroll deduction program, where their employer deducts a predetermined amount of money from the employee’s paycheck each month and sends it to the Foundation.

To correctly credit the gift to the donor’s record, the donor’s name and address must be included with the matching portion of the gift, or payroll deduction check. Donors must provide this information to their employer.

Recurring Gift: A donor can sign up for a recurring gift and allow us to debit a bank account or bill a credit card each month for a set donation amount. Contact us at 773/755-4728 or enf@elks.org for more information or to join the Recurring Gift Club.

Leadership Challenge: As advocates of the Foundation, it's important for ENF volunteers to lead by example and make an annual gift to the Foundation. ENF volunteers can demonstrate their support by donating through the Leadership Challenge. All donations received by ENF volunteers will count toward the Leadership Challenge goal, as well as toward individual recognition and Lodge per capita. Visit www.elks.org/enf/leadershipchallenge.cfm to track results of the campaign.

Planned Giving: Many Elks and their families help plan for the future by making a planned gift to the Foundation. The John F. Malley Society recognizes those individuals, so we hope donors inform us when they've planned a gift to the ENF. Applications for the Society are available through our office or online at www.elks.org/enf/malleysociety.cfm.

Examples of planned gifts are charitable bequests, gifts of appreciated stock and gifts of life insurance. Donors can find more information about these and other planned gifts by visiting www.elks.giftlegacy.com, or by contacting us at 773/755-4728.

Named Scholarship Program: Donors have the opportunity to sponsor a Most Valuable Student scholar with their gifts. To participate, a donor pledges to give \$4,000 over a period of four years, and is matched with a scholarship recipient whose award is given in the donor's name (e.g. the John Smith Most Valuable Student Scholarship). Please contact enf@elks.org for more information about the Named Scholarship Program.

ENF Appeals

A significant portion of the ENF's development efforts consist of a variety of direct mail appeals designed to reach particular target audiences. All appeals from the ENF will be clearly identified with our name and logo. Here's a look at some of the pieces we'll mail during 2009-10.

- **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 make a pledge to give annually, and who have not contributed toward their active pledge as of May 31, will receive pledge reminders in June. Pledge reminders are sent yearly until the pledge is completed, or until the donor informs our office that he/she wishes to cancel his/her pledge.

In November, we send follow-up pledge reminders to annual pledge donors who have not responded to their initial reminder—either with a donation or by canceling their pledge—as of October 31.

If a donor does not contribute toward his/her pledge for two consecutive years, the Foundation will cancel the pledge. (Note: these donors will have received four reminders without responding.)

All pledge reminders include a tear-off coupon and donation envelope. The coupon lists the amount pledged, the outstanding balance, and the suggested gift amount. If a donor is completing his/her pledge but wishes to continue receiving reminders, pledges can be renewed by checking the appropriate box on the pledge reminder.

- **Other Pledges**

We generate reminders for pledges with installment schedules other than annual, such as monthly, quarterly, etc. Similar to annual pledges, we send pledge reminders until the pledge is completed or the donor cancels his or her pledge.

- **11th Billing**

After a donor completes his/her pledge, we'll send them an 11th billing letter and reply card giving them the opportunity to renew. By responding to this appeal, donors can ensure they will not miss receiving a reminder the following June.

- **Annual Appeal**

An annual appeal will be mailed in June to active donors who do not have pledges, giving them a convenient opportunity to make their yearly gift. The annual appeal serves as a reminder to our donors to renew and/or upgrade their gifts to the ENF.

- **Email Appeals**

We send e-appeals via email 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*.

- **New Donor Appeal**

In an ongoing effort to improve our new donor retention rates, we'll be sending an appeal to donors who make their first gift during the 2009-10 year. Research shows if a new donor donates more than once in their first year, they are more likely to repeat their gift in the second year. To encourage repeat donating, one large appeal will be sent to the new donor class in mid-October. Donors who make their first gift after October 1 will receive a similar appeal in mid-February.

- **Reactivation Appeal**

This appeal targets donors who have not contributed in more than a year. All donors who gave two years ago, but not during the previous year, will receive the appeal. It mails in October and lets donors know we miss them and still need their support. We'll send a follow-up mailing in February to those donors who don't respond to the initial mailing.

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 its case for support, look at our [Case Statement](#), which is included on this disk. Below, we’ve included some simple facts and figures that should help convince even the most frugal donor that the Foundation needs their support!

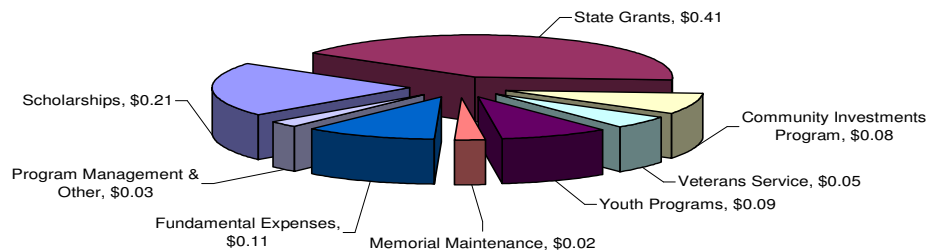
Dollars and Sense

The chart below shows a dollar at work at the ENF, based on our 2009-10 budget of distributions.

Note that 41 cents out of every dollar goes toward charitable grants to the state associations, and 21 cents funds college scholarships. Those two numbers jump out at you.

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 out of every dollar. We’re at 89 cents, way above 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 we’re using your money. And 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, 2 million academically qualified students will not go to college because they cannot afford it.
- Over the past decade, grant aid has increased by 85 percent in real terms, while education-loan volume has grown by 173 percent. In fact, the average undergraduate borrows nearly \$19,000 to finance their education.
- Within five years of entering college nationwide, more than 40 percent of students from the top income quartile graduate with a B.A. compared to 6 percent from the lowest income quartile.

During the 2009-10 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 kindergarteners through 12th-graders take care of themselves after school.
- Youth who are unsupervised during the afternoon hours are at greater risk of committing crime, substance abuse and teenage pregnancy.
- Ninety-eight percent of the families of Hoop Shoot national finalists would recommend Elks youth programs to other families.

During the 2009-10 year, the Elks National Foundation allocated \$1,534,540 for the Elks Youth programs, including the Hoop Shoot, Drug Awareness and Soccer Shoot.

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.
- Everyday, more than 250,000 impoverished, abandoned and hopeless veterans, struggle to survive in the country they fought to protect.

During the 2009-10 year, the Elks National Foundation allocated \$900,515 to fund the activities of the Elks National Veterans Service Commission. The Veterans Service program provides care to veterans in hospitals and reaches out to homeless veterans and military families.

Creating Simple Mail Merges for Mass Mailings

A mail merge is a word-processing function that produces multiple letters or labels by combining a form letter with a data file. You can use the [sample letters](#) included on the disk to send an appeal to some or all members of your Lodge.

The form letter that 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 letter for all of the records in the data file. 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 it 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.

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 Kate Keating Edsey at 773/755-4866 or katee@elks.org.

Community Investments Program

After surveying more than 1,000 Exalted Rulers about the needs in their communities, we discovered a struggling economy, drug and alcohol abuse, and the lack of constructive after-school activities for area youth topped the list. With this knowledge in mind, we launched the Community Investments Program in 2005-06, 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.

The CIP includes three main components: Gratitude Grants, Promise Grants and Impact Grants. Together, these grants provide Lodge members 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's programs. It's a reimbursement grant of up to \$500. 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 have used 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 \$500 to host an event that builds the character and competence of local youth. It does so by addressing one or more of our five promises to youth:

- **Caring Adults:** Ongoing relationships with caring adults offer youth support, care and guidance.
- **Safe Places:** Safe places with structured activities during non-school hours provide both physical and emotional safety.
- **A Healthy Start:** Adequate nutrition, exercise and health care pave the way for healthy bodies, healthy minds and smart habits for adulthood.
- **Marketable Skills:** Effective education can help youth successfully navigate the transition from school to work.
- **Opportunities to Serve:** Opportunities to give back through community service enhance self-esteem, boost confidence and heighten a sense of responsibility to the community.

These promises, if consistently fulfilled, can significantly enhance the health and well-being of children, as well as encourage them to become responsible adults. Starting July 1, 2009, the ENF will have Promise Grant applications available online and a copy will be mailed to your Lodge. All events must be completed between July 1, 2009 and July 31, 2010. The first 250 Lodges to apply and qualify for a Promise Grant receive reimbursement for expenses of up to \$500.

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

Impact Grants

In February of 2007, the ENF Board of Trustees approved funding for a new, competitive grant program. After a successful pilot year, the Impact Grants have become an important part of the Community Investments Program. In 2009-10, the Foundation will award up to \$500,000. All Lodges are eligible to apply for an Impact Grant. Applications need to be sent to the Elks National Foundation's Chicago office, postmarked by August 31, 2009.

Unlike Gratitude Grants and Promise Grants, which are designed to support small-scale charitable giving by Lodges, Impact Grants make a profound difference in Elks communities. Impact Grants are designed to support Lodges looking to meaningfully and visibly address unmet needs in their communities. These larger, competitive grants offer Lodges an opportunity to conceptualize, develop and implement a new program 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 an impact in their communities.

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 any questions, please contact us by phone at 773/755-4954 or email ENFPrograms@elks.org.

Scholarship Programs

In 2009-10, the ENF Board of Trustees allocated \$3.646 million to fund the ENF's three scholarship programs.

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

Most Valuable Student Scholarships

According to The College Board, for the 2008-09 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, students like Donovan Barfield from Vidor, Texas, and Megan Spencer from Lodi, California—the 2008 Most Valuable Student top-winners—will attend the likes of Stanford and Brigham Young University. Their Elks National Foundation MVS scholarships help make their dreams realities and their goals more attainable.

“It seems that no matter how hard I try, I cannot truly express the thanks I feel inside for the blessings I have been given,” said Megan in her speech to the delegates at the 2008 Grand Lodge Convention in Anaheim, Calif. “On every level of the Elks organization, I have been met with kindness and love.” Since 1931, the Elks National Foundation has been helping Most Valuable Students fulfill their academic dreams. In 2009, the Foundation will award a total of \$2.296 million in four-year scholarships to 500 national 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 contest deadline. 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, two fourth-place scholarships of \$16,000, two fifth-place scholarships of \$12,000, four sixth-place scholarships of \$10,000, four seventh-place scholarships of \$8,000, and 482 runner-up scholarships of \$4,000. Winners are announced in late 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 mission of the Legacy Award is to provide educational assistance to children and grandchildren of active Elks. 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.

Historically, the ENF Legacy Awards program annually granted one-year, \$1,000 scholarships to the children and grandchildren of active Elks. In an effort to keep up with rising college costs, Legacy Awards are now 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 Grant program is 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 WWII. The program expanded to include all children of Elks who have died or become totally incapacitated. In 2008-09, the ENF awarded 101 students a total of \$292,275 in Emergency Educational Grants each worth up to \$4,000 per year.

In a survey of program participants, we learned that prior to receiving the 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 the Emergency Educational Grant, the number of recipients who had concerns about financing college fell to 14 percent, and parents' worries dropped to 24 percent. While receiving an EEG dramatically affects the level of concern these families have about financing a college education, almost 89 percent of parents still contribute to the student's education costs.

ENF State Association Grants

The Foundation annually awards at least two grants to each state Elks association. The Foundation works to ensure that each association receives more money in ENF grants than the Foundation received from donors affiliated with Lodges in that state the previous year. The grants are as follows:

- Special Project Grants

Special Project Grants are awarded in June. These grants are adjusted by a flat percentage each year. The Foundation encourages the state associations to use these grants for scholarship programs or other projects that will best extend the state's philanthropic outreach. For 2009-10, the ENF granted \$2,650,540 toward this program. These Special Project Grants will be distributed as follows:

<u>State</u>	<u>2009-10</u>
Alabama	\$10,400
Alaska	\$21,280
Arizona	\$81,330
Arkansas	\$13,240
California-Hawaii	\$401,890
Colorado	\$75,170
Connecticut	\$46,800
Florida	\$104,490
Georgia	\$16,550
Guam	\$3,310
Idaho	\$12,290
Illinois	\$98,350
Indiana	\$69,980
Iowa	\$33,560
Kansas	\$26,480
Kentucky	\$12,290
Louisiana	\$9,460
Maine	\$31,680
Maryland, Delaware & District of Columbia	\$74,240
Massachusetts	\$103,540
Michigan	\$115,840
Minnesota	\$20,320
Mississippi	\$10,400
Missouri	\$32,620
Montana	\$46,800
Nebraska	\$33,560
Nevada	\$17,490
New Hampshire	\$14,180
New Jersey	\$102,600
New Mexico	\$30,730
New York	\$123,880
North Carolina	\$45,860
North Dakota	\$21,280
Ohio	\$89,360

Oklahoma	\$39,720
Oregon	\$83,220
Panama	\$1,890
Pennsylvania	\$89,360
Philippines	\$1,890
Puerto Rico	\$3,310
Rhode Island	\$24,590
South Carolina	\$11,350
South Dakota	\$24,590
Tennessee	\$61,000
Texas	\$39,720
Utah	\$23,640
Vermont	\$20,320
Virginia	\$38,770
Washington	\$60,050
West Virginia	\$18,440
Wisconsin	\$139,960
Wyoming	\$17,490
TOTAL	\$2,650,560

- State Charities Grants

State Charities Grants are awarded in August. Each state receives a percentage of the total grant based on its percentages of total cumulative giving and prior-year giving. 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. Portions of these grants also fund state Hoop Shoot, Soccer Shoot and Drug Awareness Programs, as well as other charitable activities. For 2009-10, the Foundation allocated \$3,572,020 for State Charities Grants.

The program uses a zero-sum formula that factors in cumulative giving as well as prior-year giving. If the total grant will be \$3 million, we determine a state’s grant by **a)** multiplying its percentage of the cumulative donations by \$900,000; **b)** multiplying its percentage of the prior-year donations, first adjusting the value of bequests by one-half, by \$2.1 million; **c)** adding the two pieces together; and **d)** rounding to the nearest ten.

The formula works like this:

((**State’s Cumulative Donations** divided by **Total Cumulative Donations**) multiplied by (30 percent of **Total State Charities Grant**)) plus ((**State’s Prior-Year Donations + ½ State’s Bequests**) divided by (**Total Prior-Year Donations + ½ Total Bequests**)) multiplied by (70 percent of **Total State Charities Grant**))

- Bonus Grants

The Foundation also often awards a special bonus grant, but these grants are not guaranteed. Bonus grants are based on each state's percentage of the prior-year giving. Bonus grants are distributed with the State Charities Grants in August or September.

If the Board awards a bonus, it uses the following formula:

((State's Prior-Year Donations + ½ State's Bequests) divided by (Total Prior-Year Donations + ½ Total Bequests) multiplied by (Total Bonus Amount))

In 2009-10, the Foundation will award bonus grants totaling \$1 million.

For more information on how the ENF is helping your state, check out the ENF web site at www.elks.org/enf/yourstate.cfm.

Veterans Service Program

During World War II, the Elks first pledged, "So long as there are veterans, the Benevolent and Protective Order of the 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 2009-10, the ENF granted \$900,515 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.

"Most veterans need someone to say, 'thank you,' but few ever hear it," says Korean War veteran and Elks VAVS Representative David Seaholm. "There's no better feeling than shaking a veteran's hand and thanking them for serving."

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 involved in two other programs. They have become an official collecting partner of the Library of Congress Veterans History Project, which collects and preserves the wartime stories of veterans. A new program, the "Can-Coin Program," was also started in honor of Michael F. Manning, past Director of the Elks National Veterans Service Commission. This new program aims to increase funds raised to serve veterans nationwide and will run through July 31, 2009.

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 2009-10, the Elks National Foundation granted \$748,200 to the Elks Drug Awareness Program and \$776,340 to the Hoop Shoot Free Throw Program. The Soccer Shoot program will receive \$10,000 to promote the program at the grassroots level.

Drug Awareness

The Elks Drug Awareness Program was 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 Americas youth from using illicit substances. The program accomplishes this 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 handing out a few brochures to owning more than 90 Drug Awareness trailers. "The program has become more mobile and more visual," says Kent Gade, the program's director. Besides distributing literature, current efforts include Elroy the Elk, Red Ribbon week celebrations, visual communication tools, and continued relationships with expert drug prevention groups. The program also conducts conferences, workshops and training seminars to promote an understanding of the problem.

For more information on the Drug Awareness Program, visit www.elks.org/dap.

Hoop Shoot

The Elks Hoop Shoot National 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 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.

The Elks National Foundation encourages you to recognize donors for their generosity, through both ENF Recognition Programs and your own process. Use the information on annual and cumulative recognition to answer donors' questions and to show members we appreciate their gifts.

As a volunteer, you may also receive recognition. To learn about the Leadership Pin, visit the Contests: Leadership Challenge section of this disk. Also, one exceptional volunteer is featured every month in *ENFrontline*, the volunteer newsletter. To recommend an outstanding Lodge, State or District ENF Chair to be profiled, contact enf@elks.org or 773/755-4728.

Cumulative Individual Recognition

Our cumulative recognition program thanks donors for their continued support. This program is based on total donations received, not on completed pledges. Donors are not required to start pledges to receive recognition. Future intended gifts, such as a pledge balance or a planned gift, do not count toward current donor levels.

Cumulative recognition is mailed on a weekly basis. For pin and plaque photos, visit 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 Table 1 below.

Table 1: Cumulative Recognition Levels

Level	Recognition Piece	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 ENF Lodge volunteers to help us show thanks for the continued support of our generous donors. Recognition certificates and plaques mailed to these volunteers are intended for formal presentation. Consider acknowledging donors at Lodge or State meetings and in your Lodge bulletin.

Donor level stickers and “Friend of the ENF” stickers are available, free of charge, to place on the membership cards of all ENF contributors. Also, award our red heart pins to new ENF members! You can order donor recognition brochures, free of charge, which outline our recognition programs with colorful images. These items are available on the supply order form online at www.elks.org/enf/SupplyOrders.cfm, or by sending us a supply order form in the mail.

The Foundation Fellowship: Annual Recognition Program



The Elks National Foundation's annual recognition program, called 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.

The Foundation Fellowship also provides recognition to donors who give large gifts each year, but are between cumulative donor levels, supplementing the Annual Recognition Program. *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 Foundation Fellowship recognizes six levels of giving ranging from \$100 to \$5,000. 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 are included in the Foundation Fellowship based on the sum of donations given during the current fiscal year (April 1, 2009, through March 31, 2010). This giving program restarts at the beginning of each fiscal year. The Justice and Faith pins are engraved 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.

Foundation Fellowship recognition is mailed on a monthly basis. More information about this program, including photos of pins, the pen set and tower, is available online at www.elks.org/enf/annualrecognition.cfm. All Foundation Fellowship recognition items are sent directly to the donor.

Note: The Foundation Fellowship *augments*, and does not *replace*, our cumulative recognition program. Benefits of each level of the Foundation Fellowship are listed in Table 2 below.

Table 2: Foundation Fellowship Benefits

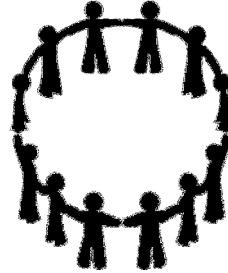
Benefits:	Levels:					
	Peace \$100+	Justice \$250+	Mercy \$500+	Faith \$1,000+	Hope \$2,500+	Charity \$5,000+
Heartbeat						
Annual Report						
Name in Annual Report						
Justice Pin						
Name in Heartbeat						
Youth Highlight Book						
Personal Tour and Lunch (if in Chicago)						
Name in Youth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

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. 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)



At \$25,000, Lodges become part of the ENF Cornerstone Club. For each giving level hereafter, the Lodge receives 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.

Knowledge (\$50,000)

Letter of appreciation and Knowledge plaque.

Community (\$75,000)

Letter of appreciation and Community plaque.

Charity (\$100,000)

Letter of appreciation and Charity plaque.

ENF Loyalty Club

The majority of donations to the ENF are for amounts less than \$100, so many donors don't reach our cumulative or annual donor recognition levels. We want to reward those donors who give year after year, no matter the gift amount, and we want to encourage other donors to do the same. Therefore, we recently 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 the donor in the spring, after we close the fiscal year. The benefits include:

- Online Donor Honor Roll
- Loyalty Club sticker for their membership card
- Bragging rights for their commitment to the ENF!

Since this program is only a couple of years old, we hope you'll help us promote it. High-level donors typically get recognized, but committed donors who give small amounts year after year are too often lost on the radar. Remember to include these individuals in your Lodge bulletin or 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.

Named Scholarship Program

You've met this Elk before. He donates to the Elks National Foundation because he knows his gift will help fund scholarships for deserving students. Having donated \$2,000 cumulatively, he's a Permanent Benefactor of the ENF whose goal is to someday reach the Silver-recognition level (\$10,000). As a chair, how do you help him get there?

Encouraging someone to consistently give in generous amounts is no easy task. But if they have motivation to give year after year, they will. You've seen this before with pledges and our annual giving program, but now the Foundation offers a special giving opportunity called the Most Valuable Student Named Scholarship Program. It's an opportunity for donors to connect personally with one of the many people served by the ENF.

The program works like this:

- The donor enrolls with a pledge to our **endowment fund** of \$4,000 over four years. The annual donation of \$1,000 can be made in a lump sum or split up into payments. The donor's Lodge will still receive per-capita credit for the gifts.
- The Foundation matches the donor with a \$4,000 Most Valuable Student Scholarship winner, who will receive a scholarship with the donor's selected namesake (ex. Elroy T. Elk Most Valuable Student Scholarship). If desired, the Foundation will try to match the donor with a student from his or her community, alma mater or major.
- The donor receives an update from the student annually, and has the opportunity to contact the student.
-

We hope this program helps our donors feel more connected to our scholarship programs and helps them reach their own giving objectives. If you know a member who you think would be interested, please have him or her contact Erin Rohan at erinr@elks.org or 773/755-4858.

ENF Chair Reports

These helpful and essential reports are always available for you on the Foundation's website at www.elks.org/enf/chairmen/LodgeChair.cfm. You can get to these reports from the ENF homepage by clicking on "Reports & Standings" in the menu. Only registered ENF Lodge volunteers can access Lodge Chair Reports when they login to the website with their *elks.org** username and password. Reports are updated regularly, and the date of the most recent information is noted at the top of the page.

*If you do not have an *elks.org* username and password, 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.

Record of Donations

The Record of Donations report is available to volunteers online at www.elks.org/enf/chairmen/RecordOfDonations.cfm. By request, this report can be sent in the mail monthly, from August through April. The online report will always be cumulative from April 1.

This report tracks donations during the current fiscal year from donors in your Lodge, and only lists donors who have given this year. 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 are:

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 report, 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, pledged amounts written off, and bequests are not factored into totals used to calculate per capita.

Example: If a donor pledges \$1,000 to the Foundation, we will reflect that pledge on the report, but we will count only the pledge payments as donations.

Here is a sample view of the printed Record of Donations report. Note: the online report looks different than this example.

Elks National Foundation - Record of Donation, 2009-2010 Fiscal Year

For the Period of 4/1/2009 through 1/31/ 2010

<u>Donor ID</u>	<u>Name</u>	<u>Type of Gift</u>	<u>Date</u>	<u>Amount</u>	<u>Lodge Credit</u>
1001-99-9999	Elroy T. Elk	Level: Sustaining Member Peace cash	4/1/2008	Total: \$300 \$100	9900
1001-99-9998	Elaine M. Elk	Level: Honorary Founder Justice pay-cash	4/15/2008	Total: \$1,500 \$350	9900

History of Donations

The History of Donations report is available to volunteers 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 first two columns list the donor's ID and name. 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 to the Foundation. The fifth column lists the date of the donor's latest gift. 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 years or more, but these groups can be included upon request. If a deceased member appears on the report, it means our records do not show that person as deceased. If this is the case, please report back to us, so that we may update our records.

If a donor transfers into your Lodge, the total on this report will reflect 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.

Elks National Foundation - History of Donations

1/1/1928 through 6/28/2008

The Elks National Foundation subscribes to the Donor Bill of Rights, which maintains we have an obligation to protect the confidentiality of our donors. As an ENF Chair, you're privy to confidential financial information about donors from your Lodge. Please respect these donors and keep this information private.

Donor ID	Name	Mem. No.	First Gift	Latest Gift	Total Donations	Pledge Balance
1001-99-9999	Elroy T. Elk	1100	3/29/1997	9/20/2008	\$1,000	
1001-99-9998	Elaine M. Elk	1101	2/1/1987	2/15/2007	\$3,000	\$400
1000-99-9999	Joe Antlers	999	3/5/1990	1/10/2001	\$100	

Donor ID Report

The Elks National Foundation subscribes to the Donor Bill of Rights, which assures donors that information about their donations will be handled with respect and confidentiality. We are frequently asked by Lodge Secretaries and District Deputies to furnish Record or History of Donations reports so that they can have access to Donor IDs or learn whether a member has donated.

In the past, we have been unable to comply with these requests out of respect for our donors' confidentiality. Now we can provide a Donor ID report, which does not list the dollar amounts donated.

The first two columns of this report list the donor's ID and name. The third column lists the date of the donor's first gift. The fourth column lists the date of the donor's latest gift. The final column lists the total number of gifts donated to the Foundation.

This report is available to ENF volunteers, Lodge Secretaries and District Deputies upon request. It is the perfect tool for a Lodge Secretary who needs ID numbers for members who contributed with their dues or for District Deputies who wish to know whether Lodge officers have donated during the fiscal year.

Elks National Foundation - Donor ID Report

Donor ID	Name	Date of First Gift	Date of Latest Gift	Number of Gifts
1001-99-9999	Elroy T. Elk	3/29/1997	9/20/2007	
1001-99-9998	Elaine M. Elk	2/1/1987	2/15/2005	12
1000-99-9999	Joe Antlers	3/5/1990	1/10/1995	1

Lapsed Donor Report

This report is available online at

www.elks.org/enf/chairmen/LapsedDonorReport.cfm or at any time upon request.

It identifies those donors who have lapsed in their support of the ENF—those who are still considered active donors, but who did not donate last year. 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.

Elks National Foundation - Lapsed Donor Report

Donor ID	Name	Mem. No.	Last Gift Date	Total Gift Amount
1001-10-9999	Elroy T. Elk	1100	9/5/2003	\$250
1001-10-9998	Elaine M. Elk	1101	4/21/2003	\$100

ENF Custom Reports

You may find that the standard reports readily available online do not serve your particular fundraising needs. We can also produce custom reports. We've listed some examples below. 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 can't find what you're looking for, please let us know. We would be happy to work with you in order to create a report that meets your needs.

Donor Category Report

Maintaining a Recognition Board is easy with this report that breaks down donors by cumulative donor levels. The Donor Category report lists Lodge donors alphabetically by donor level category: i.e., Participating Member, Honorary Founder, etc.

Donor ID/ Dues Mailing Report

This report lists the names of all ENF donors from your Lodge, their ENF donor IDs, and their Lodge membership numbers, if we have them. We ask secretaries to review the report and provide us with any missing membership numbers, as well as correct any incorrect numbers. This report helps improve the efficiency of our database. Also, if your Lodge collects donations with dues notices, this report can help make submitting donations much easier. The report lists the names and donor ID numbers of all the donors from a Lodge and includes a blank space to enter the amount they have contributed. We can also collect dues donations through a data file and automatically import the donations into our system. If this sounds like something your Lodge could do, contact the ENF office at enf@elks.org.

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.

New Donor Report

This report lists all the new donors from your Lodge in the specified time period. Use this report to ensure that all new donors are recognized with a red heart pin at a Lodge function. This report is available at any time, and for any period of time, upon request.

ENF Online Reports & Standings

Since our website is the easiest and fastest way to share and access information, some reports are available to all members who log in to the Foundation's website at www.elks.org/enf/reports.cfm. You may find the information in these reports helps motivate the donors in your Lodge, especially if anyone feels competitive! These reports are updated regularly, with the most recent update noted at the top of each report.

Personal Giving History

Individuals can access their annual record of donations during the current fiscal year. This report shows the gift dates, amounts and total for only the individual logged into the website at the time.

Lodge Per Capita – Current Year

This report allows you to view current Lodge per-capita figures and total donations, grouped by state and/or size of membership. Results can be sorted by Lodge name, Lodge number, district number, district per capita or Lodge per capita.

Lodge Per Capita – Last 3 Years

This report shows per-capita figures for the current year plus the previous three fiscal years, grouped by state and/or size of membership. Results can be sorted by Lodge name, Lodge number, district number or Lodge per capita. This report provides relevant information for your DD visits.

District Per Capita – Current Year

This report allows you to view current District per-capita figures and total donations, grouped by district only. It includes a list of each Lodge within the district, their per-capita figures and donation totals. Results can be sorted by Lodge name, size of membership, total donations or current per-capita figures.

District Per Capita – Last 3 Years

This report groups Lodges by district, and shows each Lodge's per-capita figures and total donations for the current year plus the previous three fiscal years.

Summary of Donations

This is an online version of the Summary of Donations that state volunteers receive monthly. The report provides information regarding the total donations from each state, as well as the per-capita figures and rankings for both per capita and percentage of GER's goal. The bottom of the report reflects the total donations for the period.

Chairman Challenge Standings – Current Year

This report allows you to track Chairman 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, district composite or composite score. When viewing your score, you can also click on a link that explains our scoring system.

Leadership Challenge

This report is located in Volunteers section of the website at www.elks.org/enf/LeadershipChallenge.cfm. It charts the progress toward our Leadership Challenge goal for each group: Lodge, district and state chairs, staff and trustees.

Report Schedule

The following information will help you keep track of report updates and mailings from the ENF office throughout the year.

State and District Chairs will receive the following reports by mail once monthly, between the months of August and April:

- 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 details the population of the Lodge on which the per-capita figure is based. Next, the donations, excluding bequests, are listed. 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. Totals are given for each district and state.
- Summary of Donations Report (also available on the ENF website).

To access reports on the ENF website, Lodge Chairs can visit www.elks.org/enf, click the "Volunteers" link, and select "Lodge Chair Only" (www.elks.org/enf/chairmen/LodgeChair.cfm).

Lodge Chairs can access the following reports, which are updated monthly, anytime on the ENF website:

- Record of Donations Report for current year
- History of Donations Report since inception of Lodge
- Donor ID Report (can also be accessed online by Lodge Secretary)
- New Donor Report
- Lapsed Donor Report
- Warning List Report

Lodge, State and District Chairs, as well as any Lodge member who logs on to the ENF website, can access the following reports anytime on the site:

- Current Year Lodge Per Capita (updated at least once weekly)
- Current Year District Per Capita (updated at least once weekly)
- Lodge Per Capita – Last 3 Years (updated at least once weekly)
- District Per Capita – Last 3 Years (updated at least once weekly)
- Donor Hall of Fame (updated at least once weekly)
- Leadership Challenge Progress (updated once monthly)
- Chairman Challenge Standings, on the ENF Volunteers web page (updated at least once weekly)

Lodge Chairs can opt to receive the Record of Donations Report for their Lodge by mail every month by e-mailing enf@elks.org or by calling 773-755-4728.

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.

Remember, History of Donations reports are available online at www.elks.org/enf/chairmen/HistoryReport.cfm or by request.

Q: When are the online reports updated?

A: We strive to close the previous month on the fifth business day of the next month. Reports are updated online shortly after that.

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, we don't know they're 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 us know immediately. It's important to us that our records are as accurate as possible. We'll correct the mistake as soon as we can 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 [sample former donor letter](#) on this disk 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 report to be sent to you via email, visit www.elks.org/enf/chairmen/OrderEmailReports.cfm or email us at enf@elks.org.

As an ENF Chair, one of the most important tools available to you is the Elks National Foundation's website, www.elks.org/enf. The site is full of information and resources to help you fulfill your obligations as an ENF Chairperson. Whether you're a novice navigator or an old pro, we want to make your journey through the website as useful and enjoyable as possible.

The homepage serves as your map for all ENF information. When you arrive at the homepage, you'll find a menu bar on the left side that includes the following options:

- Home
- Who We Are
- Foundation News
- ENF Programs
- Ways to Give
- Recognition
- Reports and Standings
- ENF Volunteers
- Media/Brochures
- Find a Lodge
- Return to Elks.org

Everything on the website is important and it's worthwhile to spend some time looking through each section. However, we'd like to call your attention to a few of the most important sections for ENF Chairs.

ENF Volunteers

This section is designed especially for you! The landing page of this section includes links to the following:

- [2009-10 Printable ENFC Handbook](#). The printable version of this disk!
- [ENF Chairperson Registration Form](#)
- [Frontline](#), our monthly ENF Volunteer newsletter. Be sure to check out the latest issues for news and fundraising tips.
- [Featured Volunteers](#). Each month we feature one of your peers in the field. See what creative and innovative things they're doing to promote the ENF.
- [Leadership Challenge](#). Have you done your part? Check out the progress here.
- [Chairperson Challenge Scoring Guidelines](#). No, we're not intentionally trying to confuse you. Go here to get a handle on how the contest works.

You'll also find some options on the drop-down menu on the left menu bar under ENF Volunteers. These options include:

- [Forms](#). Here you can find remittance sheets (to submit donations) and an electronic supply order form.
- [Fundraising Info](#). Looking for new ideas? Go here to read suggestions from other Lodges.
- [Scholarship Chair Only](#). Here you'll find information for judges of our Most Valuable Student scholarship contest.
- [Lodge Chair Only](#). You'll find Leadership Challenge standings, a reporting form for your October fundraiser, and your Lodge's reports, including History and Record of Donations. [See the *Reports* section of this disk for more detailed information.]

Reports and Standings

Probably the most popular destination on the site, this page is where you'll find per-capita and Chairman Challenge figures for your Lodge, district and state. You'll also find a list of available reports. These reports include *History of Donations*, *Record of Donations*, *Personal Giving History* and the *Summary of Donations* report, which lists donations by state. This section of the site is accessible to any Elks member with an elks.org user name and password.

Recognition

This section outlines the various recognition programs of the Foundation. You'll find four items on the drop-down menu when you click here: *Organization Programs*; *Individual Programs*; *John F. Malley Society*; and *Donor Hall of Fame*. It's important to familiarize yourself with the ENF's annual and cumulative recognition programs so you can design your own Lodge recognition programs to compliment what we're already doing.

This section also includes photographs of the pins donors receive at the various levels and plaques that Lodges are eligible to receive. The Donor Hall of Fame recognizes ENF contributors who've given \$1,000 or more to the Foundation, and is searchable by donor level, Lodge number, state or donor name.

Ways to Give

When you click on the heading *Ways to Give*, you'll find a list of different giving options including online giving, tributes and recurring gifts. In today's world, it's important for donors to be aware of their options. Take the time to listen to your donors, and armed with the information from this section, present different giving options so they can decide what works best for them.

Media/Brochures

If you're planning an event or simply looking for help promoting the Foundation at your Lodge, you've come to the right place. The Media section of the website contains fact sheets, newsletter ads and sample articles for you to download and use.

We hope you find the website informative and helpful as you embark on your year as ENF Chair. If you have any questions or suggestions, don't hesitate to contact us. We'd love to know what you think and what we can do to make *elks.org/enf* an even better place. Happy surfing!

What is Planned Giving?

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.

Planned gifts include bequests, gifts of appreciated stock or real estate, estate plan gifts, and life income gifts. Included on this disk, you'll find fact sheets detailing each of these planned giving options.

Why is it important?

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.

The Elks National Foundation began marketing planned giving several years ago. It's important to educate donors on the importance of planned gifts and make donors aware of their planned giving options. We're happy to provide donors with information related to their planned giving needs.

What can I do?

As an ENF Chair, we rely on you to represent the Foundation at your Lodge. We realize you're not a planned giving expert, and we don't expect you to be! What you *can* do is let your donors know that information is available. If they seem interested, give them a brochure or direct them to our website. As always, we're here to help with any questions you have.

What resources are available?

It's important to encourage donors to speak with their financial advisors about their planned giving options. However, the ENF can provide donors with basic information, such as:

- Planned giving fact sheets. (included on this disk!)
- John F. Malley Society application. (included on this disk!)
- Planned giving brochure. Available free of charge upon request. Use the supply order form on this disk.
- Our planned giving website, www.enfplannedgiving.org.

How does the ENF recognize planned gifts?

In 1928, Elks National Foundation founder John F. Malley charged the delegates of the Grand Lodge Convention with laying “the foundation of a more stately mansion—a temple of philanthropy with a dome so vast that it will cover the entire nation.” Malley dreamed of a permanent endowment fund that would support the Order’s philanthropic works.

Like Malley, many of our donors are visionaries. They can see the wonderful possibilities of the Elks National Foundation and want the influence of their good deeds to continue forever. They want to leave their legacy to the future.

The John F. Malley Society recognizes those 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 Website; and in the Foundation’s Annual Report.
- Invitation to a special event each year at the Grand Lodge Convention.

To enroll in the John F. Malley society, donors simply need to fill out a one-page application and provide us with a brief testimonial explaining why they chose to include the Foundation in their plans. A copy of the application is available on this disk.

CD Documents (included in this folder on the disk):

- Malley Society Fact Sheet
- Malley Society Application

John F. Malley Society

Named for the person who first championed the idea of an Elks National Foundation, the John F. Malley Society recognizes those individuals who plan gifts to the Foundation.



- There are many different planned giving options, ranging from simple bequests in your will to Life-Income Vehicles such as Charitable Gift Annuities and Charitable Remainder Trusts.
- Membership benefits include:
 - The exclusive John F. Malley Society pin and medallion
 - Invitation to a special annual event each year at the Grand Lodge Convention
 - Recognition in *Heartbeat*, the ENF donor newsletter; on our website; and in the Foundation's Annual Report.
- To enroll in the John F. Malley society, you simply need to fill out a one-page application and provide us with a testimonial explaining why you chose to include the Foundation in your plans. We do not need to see a copy of your will.
- Planned gifts help ensure the future of the Elks National Foundation. It's a great way to leave your legacy for many years to come!

If you have any other questions about the John F. Malley Society, please contact the Elks National Foundation at 773/755-4728 or enf@elks.org.

LEGACY TO THE FUTURE

John F. Malley Society Enrollment Form

Enrollment Instructions:

- Step 1.** Complete the official enrollment form.
- Step 2.** Include a brief explanation, on a separate sheet of paper, 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.)
<input type="checkbox"/> Will/Bequest <input type="checkbox"/> Appreciated Stock <input type="checkbox"/> Life Insurance <input type="checkbox"/> Charitable Remainder Unitrust <input type="checkbox"/> Real Estate <input type="checkbox"/> Retirement Plan <input type="checkbox"/> Charitable Annuity Trust
Gift Amount: (optional) _____

OTHER INFORMATION	
Hobbies:	Lodge Activities:

Favorite ENF Program:

- | | | |
|---|--|---------------------------------------|
| <input type="checkbox"/> Hoop Shoot | <input type="checkbox"/> Veterans | <input type="checkbox"/> Scholarships |
| <input type="checkbox"/> Drug Awareness | <input type="checkbox"/> Community Investments | <input type="checkbox"/> 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

BEQUESTS



"Drafting a will allowed us to name guardians for our 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 accomplish your personal objectives 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 80 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. You 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 this document 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 ordinarily will 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.elks.org/enf/plannedgiving or contact us 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 that 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 and 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 and 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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Elks National Foundation
2750 N Lakeview Ave
Chicago, IL 60614-2256
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., 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 and 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 and 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.

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

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 there are tax benefits 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 have 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.elks.org/enf/plannedgiving or contact us at the information listed below.



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

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.

As listed in the Development and Fundraising section of this disk under Annual Giving Process, face-to-face and personal hand-written correspondence 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 Mail Merge Instructions section of this disk.

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. This year, our Lodge could be eligible to receive up to \$500 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, for example, used its Gratitude Grant 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 October 2008, approximately 2,583,000 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 more than \$17 million during the 2009-10 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 communities 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 \$500 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 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, and your help ensures that we can 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 communities 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 \$500 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 your 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 October 2008, approximately 2,583,000 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 only 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 Welcome Back Letter

<Date>

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

Dear Mr. Elk:

Thank you for your donation. Don't forget, 100 percent of your contribution is now working for the Elks National Foundation 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 \$500 each for a Gratitude and/or 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.>

Resources Introduction

As an ENF volunteer you might feel overwhelmed. You have a lot of information to absorb and a lot of work to do, and we will do our best to help you. The following section details the resources available to you to help you do your job the best you can.

First, you will find a [supply order form](#). You can use this form to order supplies from the ENF office at any time. You can fill out the form and return it to us, or submit a request for supplies online by going to www.elks.org/enf/SupplyOrders.cfm.

Pulse, the ENF's monthly e-newsletter, is a great way for donors to stay connected to the Foundation. *Pulse* includes stories, facts and news from the Foundation's office, but we need your help to collect email addresses from your constituents. We've included [Pulse sign up sheets](#) for this purpose. You can use these sheets to collect email addresses, or encourage members to sign up online. Please note when you provide us with members' email addresses, they will automatically receive *Pulse*. Be sure members are aware they are subscribing to *Pulse* by providing their email.

If you know of members from your Lodge who are not currently donating to the Foundation but you feel they could be, you can submit their names as prospects to the ENF office. We'll add them to our database and through a series of steps, build a relationship with them. We've included a [Prospect Sign-Up Sheet](#) for this purpose.

To help you keep track of all the great supplies available to you, we've included a list of our [print and electronic publications](#). Look through this list before you submit your supply order form to see what would be most helpful for your Lodge.

The ENF website is also a great place for resources. We've included a section detailing what is available [online](#). This section not only tells you what you can find, but also offers tips to help you navigate the site.

It's very possible you'll be asked *why* somebody should donate to the Elks National Foundation. There are several great [reasons](#) for support, and we've included statistics that demonstrate the great work our programs are doing. Use these to show your Lodge's members how important the Foundation's programs really are!

Included on this disk is a [flyer](#) you can use at Lodge meetings or events. The flyer lists reasons to support the Foundation and includes a tear-off donor card to submit donations to the Foundation. You'll also find a [remittance template](#) on the disk that you can use to submit donations to the Foundation. If a donor is interested in starting a recurring gift to the Foundation, we've included a [Recurring Gift Club sign-up form](#). Recurring gifts allow the ENF to charge a donor's credit card or debit their bank account monthly or quarterly. It's easy for the donor and the ENF!

The Elks National Foundation subscribes to the Donor Bill of Rights. Our work is only possible through the generous support of all of our donors. To that end, we work hard to ensure that donors are treated with the respect and courtesy that they deserve. Take a minute to familiarize yourself with the [Donor Bill of Rights](#).

It's hard to think about next year when this year is just starting. However, when the time does come to consider 2010-11, we've included a [Chairperson Agreement Form](#) you can use to let us know if you'll be continuing on as ENF Chair for your Lodge. Hopefully, these resources will help make your job a little easier. And remember, if you have any questions or need assistance, please do not hesitate to contact us at enf@elks.org or 773-755-4728.

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.

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 its case for support, look at our [Case Statement](#), which is included on this disk. Below, we’ve included some simple facts and figures that should help convince even the most frugal donor that the Foundation needs their support!

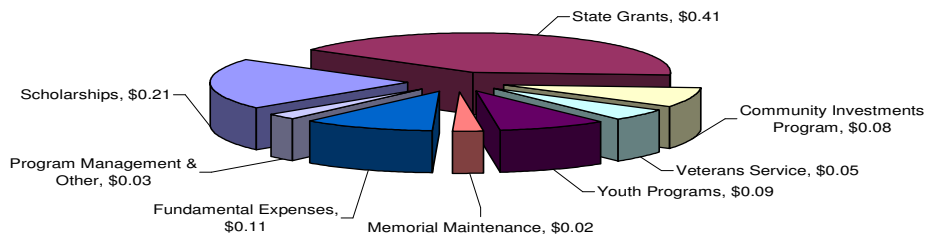
Dollars and Sense

The chart below shows a dollar at work at the ENF, based on our 2009-10 budget of distributions.

Note that 41 cents out of every dollar goes toward charitable grants to the state associations, and 21 cents funds college scholarships. Those two numbers jump out at you.

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 out of every dollar. We’re at 89 cents, way above 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 we’re using your money. And 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, 2 million academically qualified students will not go to college because they cannot afford it.
- Over the past decade, grant aid has increased by 85 percent in real terms, while education-loan volume has grown by 173 percent. In fact, the average undergraduate borrows nearly \$19,000 to finance their education.
- Within five years of entering college nationwide, more than 40 percent of students from the top income quartile graduate with a B.A. compared to 6 percent from the lowest income quartile.

During the 2009-10 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 kindergarteners through 12th-graders take care of themselves after school.
- Youth who are unsupervised during the afternoon hours are at greater risk of committing crime, substance abuse and teenage pregnancy.
- Ninety-eight percent of the families of Hoop Shoot national finalists would recommend Elks youth programs to other families.

During the 2009-10 year, the Elks National Foundation allocated \$1,534,540 for the Elks Youth programs, including the Hoop Shoot, Drug Awareness and Soccer Shoot.

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.
- Everyday, more than 250,000 impoverished, abandoned and hopeless veterans, struggle to survive in the country they fought to protect.

During the 2009-10 year, the Elks National Foundation allocated \$900,515 to fund the activities of the Elks National Veterans Service Commission. The Veterans Service program provides care to veterans in hospitals and reaches out to homeless veterans and military families.

What's Available Online for...

Scholarship Students:

- Scholar Web

Constituents:

- ENF History and Facts
- Grants and Distributions
- Lodge Giving Totals
- News and Announcements
- Online Donating
- Planned Giving Information
- *Pulse*, ENF Email Newsletter
- Testimonials
- Ways to Give
- Donor Recognition Information
- Personal Giving Histories

Volunteers:

- Downloads
- News
- Reports, including:
 - History of Donations report
 - Record of Donations report
 - Lapsed Donor report
- Scholarship Information
- Supply Order Forms
- Training Disk!

Helpful Hints

Passwords:

- To access the Members Only section of elks.org or the Volunteer section of the ENF website, you must sign up for an elks.org username and password.
- 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.

Online Giving: When donating online, start with your username and password. From there, just follow a few easy steps to make a donation.

Remember:

- Online donations are applied to your ENF donor record and your Lodge per-capita (if applicable).
- Your online record only shows your online donations.
- The personal information must match that of the credit card holder in order to make a successful transaction. To have the donation credited to somebody other than yourself, email enf@elks.org after making your donation.
- The credit card expiration date must be four digits with no separations or slashes. (Ex. 0610 for June 2010).
- You cannot have two online donation records with the same email address.

Online Giving Frequently Asked Questions

Will my credit card information stay secure?

Yes. We don't store credit cards numbers on our servers. The transaction is processed by a company that specializes in the secure management of credit cards.

Will an online donation count toward my existing pledge?

Yes. Your donation will be credited to your existing record. If you have an existing pledge, it will automatically be applied toward that pledge.

Will an online donation count toward my Lodge's per capita?

Yes. All donations given by members of a Lodge count toward that Lodge's per capita, regardless of how we receive the donation.



Can I make a tribute donation online?

Yes. During the process of making your online gift, you will be asked if the gift is a tribute. After you check 'yes,' you'll be asked to provide the tribute information, including whether the gift is in honor or memory of somebody and information for an acknowledgee.

Why can I only see my online gifts and not my entire giving history?

When you access your online giving history, you'll find that it only includes gifts that were made online. However, you can access your annual personal giving history by going to www.elks.org/enf/personalgivinghistory.cfm. You must be a member of the Elks and a registered elks.org user to view your giving history.

Can my spouse and I set up separate online giving accounts with the same email address?

Unfortunately, no. The email address is used as a way to identify online donors, and we can only set up one online giving account per email address. Fortunately, there are many free email services you can utilize, such as *yahoo.com*, *hotmail.com*, and *google.com*.

Elks National Foundation Prospect Collection

This sheet can be used to collect information from members of your Lodge who have never donated to the Foundation but might be interested in doing so. 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: _____
Spouse: _____
Street Address: _____

City, State, Zip: _____
Phone: _____
Email: _____
Lodge No: _____
Mem. No: _____
Birthday: _____
Elks Affiliation (member, spouse, etc.): _
Other: _____ | Employer: _____
Position: _____
Interests/Hobbies: _____

Lodge Activities: _____

Community Activities: _____

College: _____
Degree: _____ |
| 2. Name: _____
Spouse: _____
Street Address: _____

City, State, Zip: _____
Phone: _____
Email: _____
Lodge No: _____
Mem. No: _____
Birthday: _____
Elks Affiliation (member, spouse, etc.): _
Other: _____ | Employer: _____
Position: _____
Interests/Hobbies: _____

Lodge Activities: _____

Community Activities: _____

College: _____
Degree: _____ |
| 3. Name: _____
Spouse: _____
Street Address: _____

City, State, Zip: _____
Phone: _____
Email: _____
Lodge No: _____
Mem. No: _____
Birthday: _____
Elks Affiliation (member, spouse, etc.): _
Other: _____ | Employer: _____
Position: _____
Interests/Hobbies: _____

Lodge Activities: _____

Community Activities: _____

College: _____
Degree: _____ |



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



Recurring Gift Club Sign-Up Form
I want to join the ENF's Recurring Gift Club!

Donor Name: _____

Donor Address: _____

Phone Number: _____

Email Address: _____

Lodge No.: _____

ENF Donor ID: _____



Option 1. Direct Debit

Please draft my bank account* monthly. (Enclose a voided check for accuracy.)

Bank Draft Start Date: _____

Monthly Draft Amount: \$ _____

Signature: _____

Option 2. Credit Card

Please charge my credit card* the agreed monthly amount of: \$ _____

Visa

MasterCard

Discover

American Express

Acct. No.: _____ Exp. Date: _____

Signature: _____

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

Return this form to:
Elks National Foundation
Recurring Gift Club
2750 N. Lakeview Ave.
Chicago, IL 60614-2256
enf@elks.org

For more information, visit www.elks.org/enf/recurringclub.cfm.
Or contact the Elks National Foundation office, enf@elks.org, 773/755-4728.

**2010-11 Lodge ENF Chairperson Agreement
To be completed by all Lodge ENF Chairs**

Please read the ENF Lodge chair job description. If you agree to adhere to these responsibilities, fill in the appropriate information on this form and return to: Elks National Foundation, 2750 N. Lakeview Ave., Chicago, IL, 60614. You may also complete this form online at www.elks.org/enf/ENFChairmanRegistration.cfm, but it is not necessary to submit it both ways.

ENF Lodge Chair job description

As a Chair, your responsibilities include, but are not limited to, the following:

- A. Demonstrating your support of the ENF by donating each year.
- B. Soliciting donations from members of your Lodge.
- C. Improving your Lodge's per capita from the previous year.
- D. Promoting the ENF's mission, case and programs to your Lodge community.
- E. Sharing ENF reports with the Lodge Secretary and Exalted Ruler as needed.

To be completed by new ENF Chairs after reading job description responsibilities:

2010-11 ENF Chair: _____ Lodge No.: _____

Address: _____

Home Phone #: _____ Office Phone #: _____

Your ENF Donor ID #: _____ Lodge Membership #: _____

Other Lodge Activities: _____

Personal Interests/Hobbies: _____

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

Email Address: _____ Birthday: _____

By providing us with your email address you'll receive *Pulse*, our monthly e-newsletter. Please check here if you **do not** wish to receive email correspondence from the ENF.

The Record of Donations and History of Donations report can be accessed online by **ENF Chairs Only** by visiting www.elks.org/enf and clicking on the *ENF volunteers* link. If you do not have internet access and would like the reports to be mailed to you monthly, please check the box below.

Yes, I'd like the monthly reports to be mailed to me.

Please mail completed form to the Elks National Foundation as soon as possible, and no later than June 1, 2010, to receive bonus points in the Chairman's Challenge. We look forward to working with you!

Print and Electronic Publications

Annual Report

The ENF's Annual Report includes Foundation grants and distributions, and lists individual and Lodge supporters. The full report will be available online.

ENF Volunteer Training Disk

You're reading it! A printable version is available online at www.elks.org/enf/volunteers.cfm.

ENF Good Deeds Brochure

This four-color, glossy brochure details the Foundation's mission and objectives and includes a donation card.

ENFFrontline

ENFFrontline is the monthly volunteer newsletter (published August to April) that highlights Foundation activities, lists important announcements, and profiles ENF volunteers. *ENFFrontline* articles also appear on the ENF website at www.elks.org/enf/volunteers.cfm for easy inclusion in your own newsletters.

Grants and Appropriations Fact Sheet

It helps to let donors know how their money is making a difference. This glossy fact sheet breaks down the Elks National Foundation's distributions for this fiscal year.

Heartbeat

Heartbeat is a quarterly newsletter for the Elks National Foundation's major supporters and friends. It features Foundation programs and lists major donations.

Most Valuable Student Contest Brochure

This brochure describes ENF's Most Valuable Student scholarship contest and includes information on how to apply.

Planned Giving Brochure

This four-color, glossy brochure details planned giving options for donors and highlights the Foundation's John F. Malley Society, which recognizes those donors who include the Foundation in their estate plans. The brochure contains a tear-off portion for donors to request more information about planned giving or the Malley Society.

Scholarships for Elks Families Brochure

This two-color promotional brochure features the ENF private scholarship programs: ENF Legacy Awards and Emergency Educational Grants.

Pulse

Pulse, the ENF email newsletter, is sent monthly. This e-newsletter covers announcements, hot topics and an online spotlight. Constituents can subscribe to *Pulse* at www.elks.org/enf or on your [Pulse subscription](#) sheet.

Recognition Folder

This four-color glossy folder highlights our annual, cumulative and planned giving recognition programs. It contains program descriptions and pin pictures, as well as a donor card.

Scholarship Poster

Our scholarship poster describes the ENF's Most Valuable Student scholarship contest, including eligibility requirements and application availability, and can be distributed to local high schools. The poster can be personalized by a local Lodge.

Youth Program Highlight Book

This book is sent to Lodges and select donors, and contains information about our youth-oriented 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 Poster

Our ENF promotional poster provides an overview of ENF-funded programs and photos of program recipients. It's great for hanging at the Lodge to promote an ENF-fundraiser or simply to encourage donations.

The Story of the ENF

In 1928 John F. Malley approached his fellow Elks with an idea. He suggested that they raise money to help others, but not 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. His 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 \$350 million.

Today, people still ask us why they should donate to our endowment fund when people need help now, not 80 years from now. Lucky for us, 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 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. We fund programs that improve Elks communities through education, sports, and service to others. Each of the programs we fund has a story of its own.

Giving Back

Early on, the 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 grants from the ENF.

Some states are addressing problems that existed in 1928. Most are not. 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.

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 scholarships, of \$300 each.

Two years later, the program was officially named the Most Valuable Student contest.

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 and totally disabled Elks.

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

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, Mass., 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.

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, drug trailers in communities nationwide, Red Ribbon Week activities, public service announcements and much more.

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

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 their efforts.

Helping out at Home

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

We introduced the Community Investments Program in 2005 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 \$400 each.

While a little help can go a long way, a lot of help goes even farther. The latest component of the Community Investments Program, Impact Grants, allows Elks to improve their communities in significant and lasting ways. The grants are worth up to \$10,000 each, and the inaugural class of recipients will use them to build wheelchair ramps for disabled community members, to start an after-school tutoring program for underprivileged youth, to implement a Meals-On-Wheels program for the elderly and much more.

The CIP's story is just beginning. 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.



How does the ENF help your community?

Ways the ENF invests in You



Community Investments Program: Invests directly in Lodge communities, and is designed to have a lasting impact through Promise, Gratitude and Impact Grants. This year, the ENF will grant \$1.37 million to improve Elks communities.



State Grants: The ENF strives to return more to each state than it received from that state in donations. These grants, totaling \$7.22 million, help fund the state Elks associations' major charitable projects.



Scholarships: The ENF provides more than \$3.64 million in college scholarships each year, including two scholarships exclusively for Elks' children and grandchildren.



Youth Programs: The Hoop Shoot, Drug Awareness Program and Youth Veteran Volunteers all provide children with positive, character-building activities that encourage youth to become outstanding members of their communities. This year, the ENF allocated more than \$1.5 million to support our youth.



Veterans Service: The ENF will provide \$900,515 to the Elks Veterans Service Commission this year to assist veterans and to honor those who served our country.

For more information, visit us online at www.elks.org/enf!

Yes! I'd like to make a difference in my community.

Name: _____
Address: _____
City, State, Zip: _____
Lodge No.: _____ Member No.: _____
Birthday: _____ Email: _____

Enclosed is my donation of: \$25 \$50 \$100 \$250 Other
I would like to pledge: \$100 \$250 \$500 \$1000
Please send me reminders: Annually Quarterly Monthly

I would like more information on your Recurring Gift club: (Yes/No)
I would like more information on Planned Giving: (Yes/No)

Return to: Elks National Foundation, 2750 N. Lakeview Ave., Chicago, IL 60614, phone: 773.755.4728

Donate online at www.elks.org/donate!



Elks National Foundation

State:

SUPPLY ORDER FORM

Lodge Number:

2750 N. Lakeview Ave. Chicago, IL 60614-2256

Date of Order:

Lodge Name:

SHIP TO:

Shipping Method

Circle one: (US Mail) (UPS)

Qty.	Item	Qty.	Item
	Heart Pins (limit – 200)		Grants and Appropriations Fact Sheets (in 50s)
	Heart Stickers (60 per page)		Dues Mailing Buck Slips (in 100s)
	Donor Level Stickers (60 per page)		ENF Brochure (in 100s, 500 max)
	ENF Poster		Recognition Folder (in 100s)
	Remittance Packets		MVS Brochure (in 10s)
	Memorial Envelopes		Scholarships for Elks Families Brochure (in 10s)
	Donor Cards (in 100s)		CIP Brochure (in 10s)
	ENF Chairperson Training Disk		Bookmarks (in 100s)
			Other:

Requested by: _____
(Please sign)

5/09

ENF Chairperson **Secretary** **Exalted Ruler** **Other: _____**

ENF USE ONLY!

Written by:	Date Shipped:	Weight	UPS	PP	Amount

Description of Supplies

Heart Pins—Recognition for first-time donations to the Foundation.
Heart Stickers—Recognition for membership cards of Foundation donors. “Friend of the ENF.”
Donor Level Stickers—Stickers for membership cards of donors, displaying cumulative giving level by dollar amount.
ENF Poster—Colorful poster to hang at the Lodge to promote the ENF.
Remittance Packets—Packet of three different forms to record donations and send to the Foundation.
Memorial Envelopes—Envelope for a donation made in the memory or in honor of a loved one.
Donor Cards—Envelope-sized cards to record Foundation donations and member information.
ENF Training Disk—Contains fundraising ideas, resources and explanation of duties for ENF Chairs.
Grants and Appropriations Fact Sheet—Colorful glossy sheet outlining the ENF’s distributions for 2009-10.
Dues Mailing Buck Slip—Small inserts to encourage members to donate with their dues.
ENF Brochure—Four-color glossy promotional brochure. Includes a donation card.
Recognition Folder—Pamphlet-sized glossy brochure of ENF’s Individual recognition programs.
MVS Brochure—Four-color promotional brochure featuring the three ENF Most Valuable Student Contest.
Scholarships for Elks Families Brochure—Promotional brochure featuring the ENF private scholarship programs.
CIP Brochure—Promotional brochure highlighting the grant components of the Community Investments Program.
Bookmarks—Handy bookmark highlighting ENF in your community for distribution to potential and current donors.
Available exclusively online at www.elks.org/enf/volunteers.cfm:
Annual Report—Foundation’s Annual Report for the previous fiscal year.

Order your supplies online at elks.org/enf/SupplyOrders.cfm.



Available ENF Supplies

The ENF office wants to do everything we can to make your job easier. That's why we provide all ENF supplies free of charge to our volunteers. Here's a list of what we offer and how you can use it. If you have any questions or a great idea for a new item, contact our office at enf@elks.org. You can order supplies on our website at www.elks.org/enf/SupplyOrders.cfm, or call 773/755-4728 to place an order by phone.

- **Heart Pins** – Who loves the ENF? These small red heart pins should be awarded to donors when they make their first-ever gift to the Foundation. Donors wear this pin with pride knowing they're part of the "Great Heart of Elkdom."
- **Heart Stickers** – Everybody's wearing one. Designed for membership cards, these stickers are an easy way to give a little extra recognition to ENF supporters in your Lodge. As an incentive for people to continue giving, place them only on the cards of those donors who have donated within the current fiscal year.
- **Donor Level Stickers** – Another option for your membership cards, these stickers recognize donors based on their cumulative giving. With donation amounts ranging from \$10 to \$5,000, you're able to reward donors who reach different giving levels.
- **Remittance Packet** – We really do want to make your life easier. Use our remittance packets as an easy way to organize and submit donations from your Lodge. You can order them from our office or use the printable Excel version available on this disk. The packets include 3 different forms: 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 somebody. The packet also includes sample forms and instructions on how to properly complete them.
- **Memorial Envelope** – One of the more popular ways to donate to the Foundation is in memory or in honor of someone else. These tribute envelopes make it easy to honor loved ones with a gift.

- **Donor Cards** – These are a great tool to have on hand at the Lodge. Donor cards allow you to capture all necessary information from your donors, which in turn, helps us provide better service. Donor Cards are especially helpful when reporting new donors, so we can create complete and accurate records for them.
- **ENF Training Disk** – The disk has all the answers! All Lodge, District and State volunteers receive an ENF training disk from our office. The disk contains information about ENF programs, instructions and tips for volunteers, and tools such as sample letters to assist Lodges in their fundraising efforts. A printable version of the disk is also available on the website at www.elks.org/enf/Chairmen.cfm, in the Forms section. Additional disks for volunteers are available upon request.
- **Dues Mailing Buck Slips** – Is your Lodge asking for donations to the ENF with your dues mailing? If not, you should be. We want people to be thinking of the ENF when they consider whether to renew their membership. That’s why we’ve designed this small, lightweight slip to include with your dues mailing, promoting the ENF and all the good reasons to donate.
- **ENF Brochure** – “What is the Elks National Foundation?” This might seem like a foolish question to us, but to many, the answer isn’t obvious. Our ENF brochure is the perfect way to answer this question and any others people might have about the Foundation. Keep some in a brochure holder at the Lodge, hand them out to new members at Indoctrination, or include one with your Lodge newsletter. The brochure even includes a tear-off donor card!
- **Recognition Folder** – Everyone loves pins, or at least all Elks love pins. So what’s the next best thing? Pictures of pins. Our recognition folder includes pages explaining our annual recognition program, our cumulative recognition program and our planned giving recognition program. If somebody is on the cusp of the next donor level, showing them what they could receive by reaching the next level is a great incentive to encourage them to give.
- **MVS Brochure** – Your town is full of them. Those smart, talented high school seniors looking for help to pay for college. Don’t disappoint them. Our Most Valuable Student contest brochure provides useful information such as where to get applications, contest deadlines and how to apply.

- **Scholarships for Elks Families Brochures** – Did you know the ENF offers scholarships for children and grandchildren of active Elks? There are probably some members of your Lodge who don't. This brochure contains information about how to apply for a Legacy Award or an Emergency Educational Grant. It also serves as a reminder of why it's great to be an Elk. Order some for your Lodge, and pass them out at a Lodge meeting.
- **Magnets** – Let the ENF force be with you. Our ENF 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 and might inspire somebody to go online and make a donation.
- **Bookmarks** – We make reading fun! Our ENF bookmarks are lightweight and attractive, featuring information on local philanthropy. They're perfect to include with a Lodge mailing or to hand out at a meeting.
- **Planned Giving Brochure** – The gift that keeps on giving. Talking to donors about their planned giving options isn't always easy. Yet those donors who choose to include the ENF in their estate plans make the ultimate commitment to the Foundation. Our Planned Giving brochure is a great tool for approaching this sensitive topic.
- **ENF Poster** – The ENF poster provides an overview of ENF-funded programs and photos of program recipients. It's a great promotional piece to hang up at the Lodge or to display for new members at Indoctrination.
- **CIP Brochure** – Do you want to help make your community a better place? Learn how to make this a reality with our Community Investments brochure. It gives an overview of our three grant programs, and how your Lodge can qualify for a grant.
- **Grants and Appropriations** – This glossy brochure breaks down our distributions for 2009-10 and lets donors know their donations are making a difference. *This flyer is only available to order while supplies last, but you can access a printable version anytime on our website at www.elks.org/mediabrochures.cfm.