



DONOR
HANDBOOK

EST. 1991

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WHAT IS A FOUNDATION?



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A community foundation is an independent nonprofit organization that focuses on giving back to its community for the betterment of its people. Most community foundations are geographically defined and give back to their local communities in the form of grants to charitable organizations and projects. Supported by a broad variety of donors and governed by a volunteer board, a community foundation uses funds from many sources, such as individual donations, gifts from businesses, or bequests to address vital needs and opportunities in the local community.

Community foundations assist in not only educating donors on local needs, but also providing personal, informative and reliable recommendations for effective charitable planning, giving and implementation.

One of the best aspects of a community foundation is the ability for you to leave a legacy. Your charitable intentions and goals are supported while you live. Those same charitable intentions are honored and facilitated even after you are gone. The Foundation will keep your charitable legacy forever.

The key way community foundations support the local area is through building endowments. An endowment is an investment within the community foundation where the principal of a gift is held in perpetuity. The endowment dollars are invested to provide both income and growth, and a portion of the income is made available each year for spending on charitable purposes. After a period of time, the amount paid out of the endowment in grants is larger than the original gift, which continues to be preserved in perpetuity. This multiplying effect is the power of a permanent endowment.

Partnering with the Jasper Newton Foundation allows donors the freedom to provide support for causes they are truly passionate about. When you give – your money directly impacts the community you live in.

WHO ARE WE?



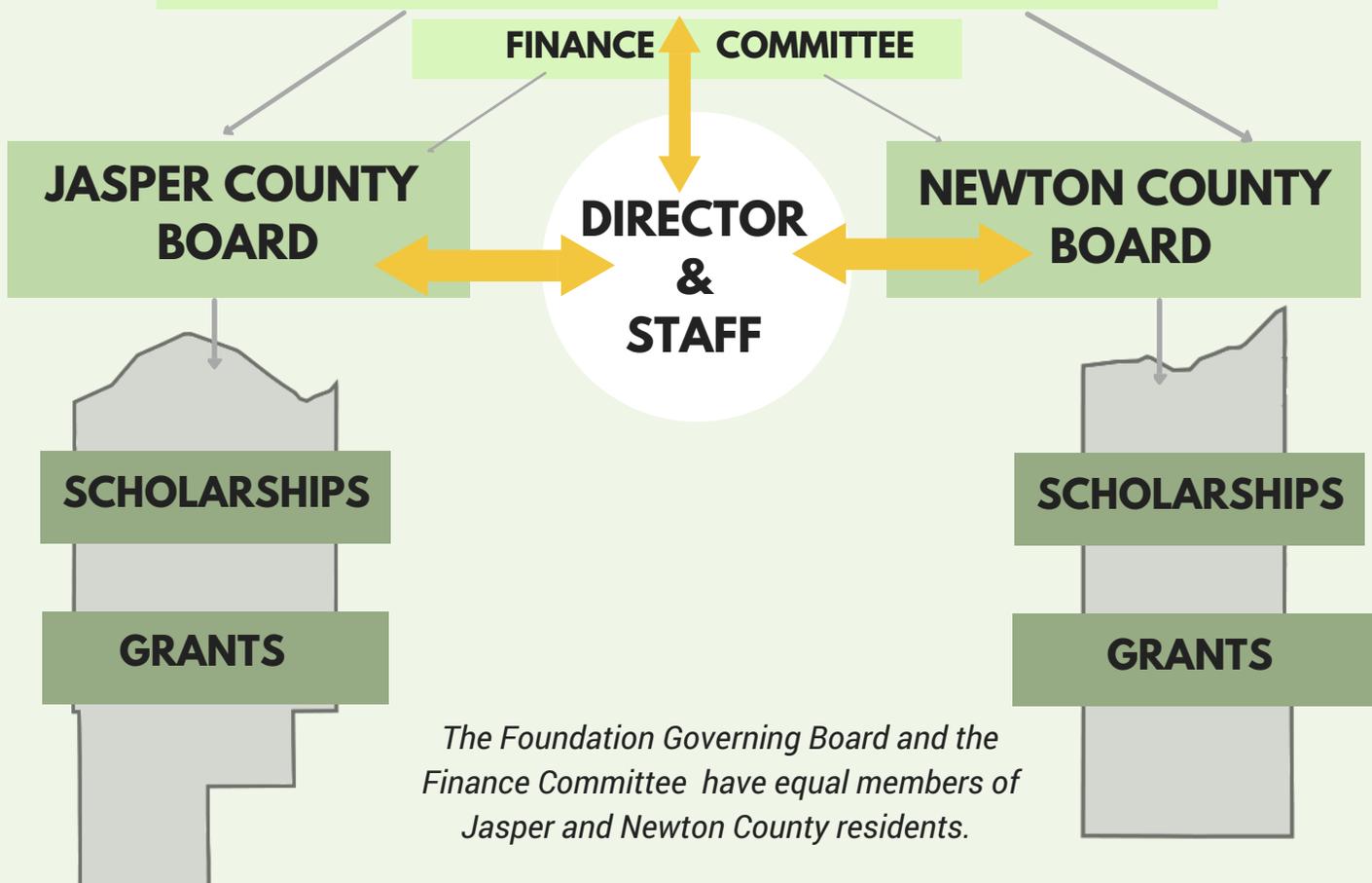
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We are numerous members of the Jasper and Newton County community uniting together through gifts, grants, endowments, and scholarships in order to improve our county and the lives of those who live in it. Our volunteer board members honor the charitable intentions of all of our donors.



JASPER NEWTON FOUNDATION GOVERNING BOARD



The Foundation Governing Board and the Finance Committee have equal members of Jasper and Newton County residents.

WHO ARE WE?

continued



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OUR FIVE PILLARS OF GIVING

We focus our giving to nonprofits and charitable causes in the following areas:



EDUCATION

Examples Include: Scholarships, School Trips, Class Supplies, Adult Education



ARTS AND CULTURE

Art Camp, 9/11 Memorial, School Art Awards, Theaters, Festivals



COMMUNITY INITIATIVES

Green Spaces, 4-H, Libraries, Community Services, Veterans Council



HEALTH

Healthcare Equipment, Food Pantries, Sensory Room, Nutrition, Drug Free Initiatives



HISTORIC PRESERVATION

Historical Society, Carnegie Center, Local Artifacts, County Historic Buildings

GRANT STORIES



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\$843,374 WERE INVESTED IN
2017 TO JASPER
AND NEWTON CO.
COMMUNITIES!

Senior and Adult Guardianship Advocates

As a new organization, Senior and Adult Guardianship Advocates, "SAGA" received their first grant in 2017 to secure matching State and Federal dollars to start this program in both Jasper and Newton Counties. SAGA strives to advocate for incapacitated adults and elderly individuals who do not have someone to serve as a guardian. This program will support the individual's care, finances, and overall well-being when there is no friend or family available or able.

Say No to Bullying

Even the young individuals in our community can make a big difference. In 2017, two Jasper County elementary students applied for grants to make their school better. One of these grants focused on funding the purchase of materials to start an anti-bullying club in their school. 5th graders will lead a small group in each grade level through the materials. Even our youngest citizens can change their part of the world.

After-School Programming

As the only after-school program in their Newton County school district, this program was in desperate need of supplies and equipment to support their under-served students. The Foundation awarded them a grant to do just that, thus providing healthy snacks, games, crafts, playground equipment, a futon, and newsletters to the parents.

WAYS TO GIVE



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NOW:

- **Gifts of Cash**

A cash gift of any size can be a gift to an existing fund or larger gifts can establish a fund. These gifts can be memorials, in honor of specific individuals, or in the interest of specific organizations. Checks can be made payable to Jasper Newton Foundation, Inc. or gifts can be made through jasperfdn.org. Please consult your tax advisor for deductibility.

- **Securities**

Gifts of appreciated stock, bonds or most mutual funds also provide tax advantages. Please start the conversation with your investment professional.

- **Real Estate**

We can accept a gift of a house or other personal residence, farm, commercial building and income producing or non-income producing land. Please consult your tax advisor for how to begin this process and if it is a good fit for your tax situation.

- **Life Insurance**

When you name the Community Foundation as the owner and beneficiary of an existing or new life insurance policy, you may benefit in a tax deduction. All premium payments made thereafter are deductible as a charitable contribution through the Foundation. Your investment professional will know best.

**How you give should be discussed with your tax professional or investment advisor in order to see what means of giving best works for you. Be aware of recent tax law changes.*

WAYS TO GIVE

continued



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LATER:

By making a planned or deferred gift in any amount to the Foundation, you can join the Legacy Society. The Legacy Society is a group of forward minded individuals who plan to leave a lasting mark on our community. This giving can be done in multiple ways:

- **Bequest**

A charitable bequest to the Community Foundation enables you to retain control over your assets during your lifetime and support the community you love later. A charitable bequest in your will can be a specific dollar amount, a percentage of your estate, or what remains after other bequests are made.

- **Retirement Plan**

Individual Retirement Accounts (IRAs) or other qualified retirement plans are often one of the best types of assets to leave to charity because they are taxed so heavily when left to heirs. When you leave retirement plan assets to a nonprofit—such as the Community Foundation—100 percent of the gift will be available to support your charitable interests.

- **Charitable Lead Trust**

A Charitable Lead Trust enables you to make significant charitable gifts now while transferring substantial assets to beneficiaries later. A trust is set up from which the Community Foundation receives annual payments for your lifetime, or for a specific number of years. These funds may be used to support nonprofits you choose or be added to an Advised Fund. When the trust terminates, the principal is returned to you or distributed to others you designate. The trust assets pass to the recipients at reduced tax cost—sometimes even tax-free. If you are interested in this gift, contact your financial adviser.

- **Charitable Gift Annuity and Remainder Trust**

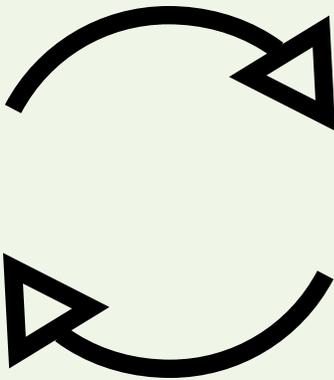
There are many different ways to donate and leave a legacy that would best fit you. To seek out more information, please contact your financial adviser.

TYPES OF FUNDS



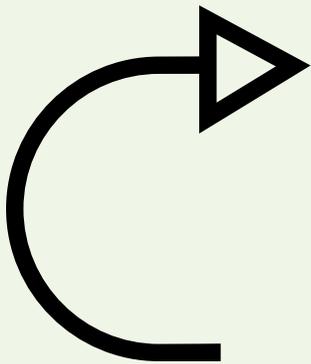
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PERMANENT & ENDOWED

Permanent or endowed funds benefit an organization, cause, or the general community forever. These funds are invested into a diversified portfolio. The income made from this investment pool helps each fund grow and provide stable support that is annually infused into the community.



NON-PERMANENT & PASS-THROUGH

Non-permanent or pass-through funds are available (in full) to grant out immediately. These funds will not make an income but there is more flexibility on how much and when these funds are distributed. Pass-through funds are intended for short-term projects and liquidity.

TYPES OF FUNDS



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LEVEL OF INTERACTION:

Each year, the Foundation will send the fund contact an **annual fund statement** and our **annual report**.

TYPES OF FUNDS: *The following is listed from requiring least fund contact involvement to most.*

Unrestricted Funds

- An Unrestricted Fund is set up for the general benefit of the community and is the most flexible fund option. Grants are determined by the JC and NC Grants Committee under the authority of the Board of Directors. There is no ongoing advice or recommendations for the grants from the donor.

Designated Funds

- A Designated Fund is established to provide support for a specific public nonprofit (e.g., the local art museum, school or hospital) to provide that organization with ongoing financial support and security. With a Designated Fund, there is no ongoing advice or recommendations from the donor or designees.

Field of Interest Fund

- A Field of Interest Fund is established to provide support for a specified charitable purpose (e.g., cancer research, the arts, public schools, impoverished children). Grants are determined by JC or NC Grants Committee under the authority of the Board, with no ongoing advice or recommendations from the donor.

Agency Fund

- An Advised Agency Fund is established at the request of a nonprofit to provide support for the agency, as recommended by the agency. The annual disbursement is available to support the agency according to its founding documents and charitable purpose.

Donor Advised Fund

- A Donor Advised Fund provides the most flexibility to the donor. Grant recommendations can be made at any time by the donor and must be for 501(c)(3) public charities, not to individuals or for scholarships. The recommendations are advisory only, and the community foundation is free to decline any or all recommendations.

Scholarship Fund

- A Scholarship Fund is established to provide educational scholarships to individuals. The donor may have an advisory role; however, they must not act as a majority of the Scholarship Advisory Committee recommending the recipient.

DONOR STORIES



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Jasper County Stepping Stone Fund

At the Foundation, we also have anonymous donors. Anonymous donors want to create change in our community without having their name tied to the gifts and granting. One of our local donors decided to set up an anonymous donor advised fund that benefits arts, culture, and education within Jasper County. This fund has gifted to the Life Skills class at one of the local high schools, and most recently, the Fendig Summer Theatre for Children.

Robert and Jeannette Batton Scholarship Fund

One of the first funds in Newton County was the Robert and Jeannette Batton Scholarship Fund. This scholarship set out to assist students who are involved and succeeded academically but had a financial need that limited the possibility of college. After gifting \$200,000 to create an endowment, the Battons entrusted the Foundation's board to make the yearly decision of choosing the qualified students to be awarded the scholarship. As of 2017, this fund has given out \$68,750 in 40 different scholarships.

Terry D. Elijah Endowment Fund

Estate gifts are an important part of the Foundation's history. One recent example of an estate gift is the Terry D. Elijah Endowment Fund. In Mr. Elijah's will, he outlined the creation of his fund that is designated to pay yearly income to a local church, the fair board, and children's health and wellness initiatives. His forward thinking has created gifts for these organizations forever.

HOW WE SUPPORT OUR COMMUNITY



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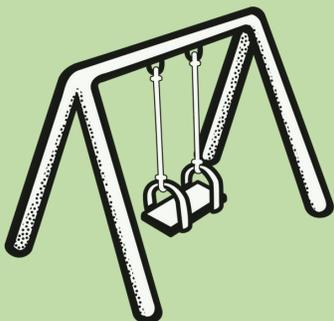
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PARTNERSHIPS BETWEEN NONPROFITS

community initiatives

WE HELP COMMUNITY PROJECTS
GET OFF THE GROUND WITH
DONATIONS AND GUIDANCE



WE KNOW OUR COMMUNITY NEEDS

connecting donors with their passion

HOW WE SUPPORT OUR NON-PROFITS

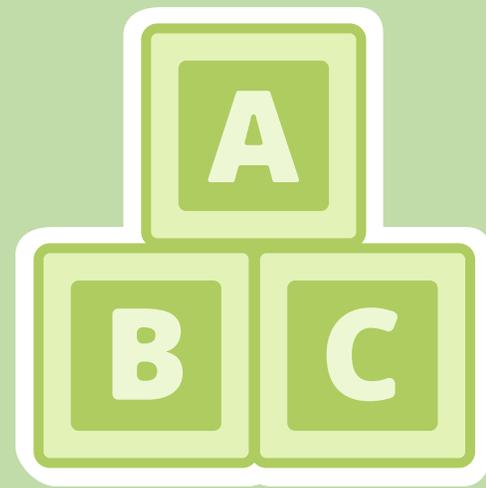


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HELPING OUR NONPROFIT ORGANIZATIONS STAY

- *healthy*
- *knowledgeable*
- *sustainable*



CAPACITY BUILDING



CONNECTING VOLUNTEERS

The Foundation has become a vehicle for partnering volunteers with nonprofits and nonprofits with volunteers.

We help our nonprofits find alternative funding sources AND

MATCHING \$\$\$

we do our best to locate funds - even if we cannot write a check directly.



NOTE FROM THE DIRECTOR



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I have heard former board president, Dr. John B. Egan, describe the Foundation as “a group of testamentary funds.” If you look up this phrase there are enough definitions, according to Google, about last wills and testamentary trusts to make your brain spin. I want you to consider this phrase in a different way – no brain spinning required.

If you break down the word “testamentary” to “testament”, certain wisdom enters the conversation. Each generous dollar that Ralph and Lillian Fendig entrusted to the Foundation is a testament of their life’s work, passion, and speaks to their belief in each person who benefits from their funds each year. Each fund started at the Foundation as a scholarship in the memory of a loved one who has passed on too soon is a testament of their days on earth, their character, and their families’ desire to share that love and life story with you. Each donation you invest through the Foundation is a testament of the hours you worked to earn it, the character you hold, and it is a true statement of your belief in your fellow community members.

Every grant check or scholarship check that leaves my office is a continuation of those testaments. They travel through here and into the organizations that directly serve our community members. The belief that all humans deserve a helping hand is shared in every basket of food handed out through the numerous food pantries in Jasper and Newton counties. The belief that we should care for all of our community from the very youngest to the very wisest is written in each check to Community Services, Step Ahead, and the local daycare center. These are the beliefs you share in each donation you give.

What do you want your story to be? What statements of hope, charity, and faith do you want to share with your community? What beliefs do you want to pass on? Let the Jasper Newton Foundation hold those testaments and help write **your** story.

We are our best selves when we give.

With Gratitude,
Brienne Hooker

WHAT THE COMMUNITY SAYS ABOUT US



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"This is an amazing foundation that provides otherwise unreachable opportunities to area non-profits." -Kristine Wright, *Director of Brook-Iroquois Washington Public Library*

"Without your dedication to what you do, I do not believe that we would have been successful as fast as we were." -Chris Woodcock, *Jasper County Veterans Council*

"I can't tell you how much your support has meant to me. Truly has made such a difference in my life and for that I will always be grateful." -Clarisa Bonilla, *Jasper Lilly Scholar 2006*

OTHER WAYS TO GET INVOLVED

Check out our website! www.jasperfdn.org
and click the **Get Involved** Tab

Women's Giving Circles

Join a Committee

Attend Our Events

Volunteer with Us or a Local Nonprofit

Donate while shopping @ [smile.amazon.com](https://www.smile.amazon.com)

Follow us on Facebook, Instagram, and Twitter.

CONTACT

THE FOUNDATION



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HOW TO CONTACT US

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www.jasperfdn.org

bhooker@jasperfdn.org

STAFF

Brienne Hooker, Executive Director

Ashley Hughes, Program Director

Jana Drone, Finance Director

In order to see the current list of volunteer board and committee members, please visit our website, www.jasperfdn.org