



Title: **Successful Outreach Leads to Living Legacies**

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From the beginning, the Ida County Community Betterment Foundation (ICCBF) Advisory Board recognized that “We could do more if we were better known ... and understood.” An outreach and marketing plan for three targeted audiences was developed with the goals of engaging **donors**, interacting more effectively with **nonprofit organizations**, and educating **professional advisors**. A specific communications toolkit was developed for each audience.

Initial steps included preparing a packet of materials about the Foundation (brochure, Endow Iowa Tax Credit handout, information about fund options and ways to give, etc.), developing a PowerPoint, creating a presence on our host foundation’s website for affiliates, and submitting numerous press releases.

Efforts to educate the general public included a booth at the Ida County Fair with 300 brochures handed out, presentations to 23 civic and service organizations, direct mailings, and an introductory event with 53 attendees. PowerPoint was shown and information handed out. Notable outcome: donor pledged \$100,000 to the ICCBF unrestricted endowment fund.

The first step in targeting professional advisors was to create a database inclusive of all advisors (35) in the County. A ‘Three Steps for 3 Months’ Advisor Outreach Plan was initiated. This included one-on-one meetings with 10 key advisors, hosting a dinner event with guest speaker (estate planning professional) attended by 24 advisors, followed by a direct mailing to each advisor in the County. Each step of Plan included customized handouts to educate advisors and for sharing with their clients. Notable outcome: ICCBF received a bequest gift of \$93,975 to establish a scholarship fund. Also notified ICCBF named in two other wills.

To interact more effectively with nonprofits, a database of 106 nonprofits and units of local government was created. Grant workshops have been held each year with a total of over 60 attending. Meetings with 6 nonprofit boards have been conducted about how to establish an agency endowment. Notable outcome: one agency endowment fund and 2 expendable funds have been established. A \$100,000 gift from one donor was received for an agency’s endowment fund. Donor said Foundation provided a way for people to give back to their community.

ICCBF contracted to have a countywide needs assessment conducted through CD-Dial with surveys sent to 812 households. Results impact the effectiveness of ICCBF grantmaking efforts.

A binder with information on every activity and our promotional materials can be provided upon request.