



# Tipton County Foundation

*Growing, Leading, and Serving Since 1986*

Strategic & Operational Plan 2016 - 2020

Adopted • December 8, 2015

## MISSION & VISION

The Tipton County Foundation exists for the broad-based philanthropic interests of and community benefit of residents of the defined geographic area of Tipton County, Indiana. The Foundation is a tax-exempt, nonprofit, autonomous, publicly supported, nonsectarian philanthropic institution. Through philanthropic donor services, strategic grantmaking, and constructive leadership, your hometown community foundation unites the gifts of many to sustain the causes that matter to all— now, and for all generations to come.

To carry out this mission, the Foundation serves donors in implementation of their philanthropic intentions, primarily by managing the growth of funds for scholarships and other interests specified by givers. The Foundation awards grants strategically, to help support charitable needs in the county, based on the high impact that projects will have on community life. The Foundation cultivates altruistic leadership: civic-spirited investments of time, talent, and treasure by all segments of the community.

Founded in 1986 and guided by civic-spirited



Volunteers, its long-term goal is the building of permanent, named component funds established by many separate donors to carry out their charitable intent. TCF manages

dozens of scholarships and other targeted funds, promotes the United Community Fund to sustain a network of social service agencies, coordinates Ducky Day in Tipton Park, and encourages life-long education, volunteer involvement, and a host of other community benefits.

Contributions to the Tipton County Foundation are tax-deductible under section 501(c)(3) and the public charity provisions of sections 509 and 170 of the Internal Revenue Code. The IRS recognized TCF

in July 1986 as exempt from federal income tax. TCF is a member of the Indiana Philanthropy Alliance and the Indiana Association of United Ways.

## NATIONAL STANDARDS

The Tipton County Foundation is accredited in compliance with National Standards for U.S. Community Foundations™, a program that establishes legal, ethical, and effective practices in philanthropy.



Excellence. Accountability. Impact.™

## SUSTAINABILITY OF THE TIPTON COUNTY FOUNDATION

Donors occasionally contribute to TCF's management and operations, but TCF currently conducts no campaign for its own benefit-- only for the causes supported by its various funds. Donor dollars are only used specifically for the purpose the donor intended.

Sustainability for the management expenses comes from the proceeds of our investments in two ways. One way is by the proportional share allocated directly to the Foundation's own operating endowments, and restricted gifts from other endowments intended to benefit the Foundation itself. The other is from the lowest fee in Indiana paid by each component fund —out of the proceeds TCF itself allocated to the Fund. No donor dollars are used to pay required fees for endowed funds.

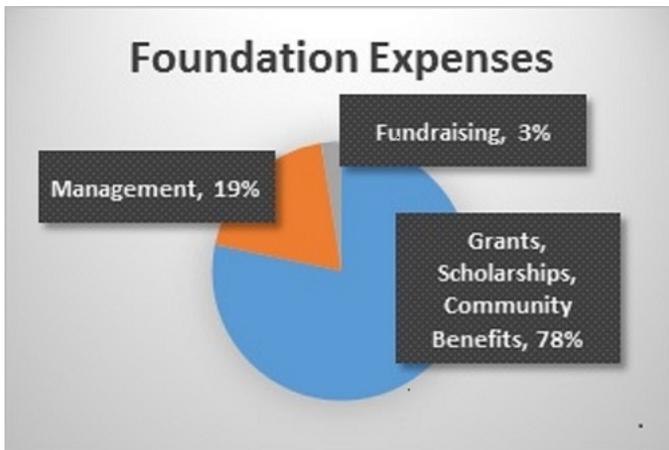
## RESOURCE DEVELOPMENT

The Foundation has established and will assist donors in creating new component funds of various types that support personal or general charitable purposes. Gifts of cash (checks), land, investments with appreciated value, IRA rollovers, and such mechanisms as charitable gift annuities are all supported.

## INVESTMENT AND SPENDING POLICIES

The Investment Policy Statement (IPS) has been formulated by the Finance/Investment Committee, based upon advice from investment advisors Capital Cities LLC, in consideration of the financial implications of a wide range of policies, and describes the prudent investment process that the Board deems appropriate. The objectives are:

1. To design an investment program that preserves real purchasing power in perpetuity.
2. To apply the Foundation's current Allocation (Spending) Procedure as determined from time-to-time.
3. To control both administrative and investment costs incurred by the Foundation.
4. To achieve investment return of Foundation assets in light of acceptable risk levels. Investment results and endowment building are the critical elements in achieving the investment objectives.



## GRANTMAKING

Preference is given to grant proposals that...

- Address priority community concerns that may change over time
- Are change-oriented and problem-solving in nature
- Assist grantees to achieve measurable objectives and have a transformational impact on their clientele
- Will have the greatest benefit per dollar granted

- Have the potential of encouraging donations from the general public through a match by the Foundation
- Have the potential of leveraging additional grants from other sources

**Grants will be made only...**

- To groups which are nonprofit and charitable (including formal, informal, governmental, and ad hoc).
- To organizations that document their responsible fiscal management and adequate accounting procedures.
- For projects or programs that are proposed in writing by the organization's governing body.

## CIVIC ENGAGEMENT

The Foundation encourages volunteers to be involved in community organizations, schools, sports, government, churches, arts, and associations that benefit commerce and development. For itself, TCF maintains a diverse, ethical, and responsive governing body that assures the transparent and effective operation of the Foundation.

## STRATEGIC OBJECTIVES 2016 - 2020

**The Tipton County Foundation Will...**

1. Continue to serve donors, award grants and scholarships, and provide leadership to improve the quality of life in Tipton County.
2. Continue the practice of compliance and accreditation with the National Standards for U.S. Community Foundations™.
3. Continue to sustain the management/general and fundraising budgets at a level no greater than the proceeds available from component funds endowed or designated for such purposes, the fees charged to component funds, and any special contributions for such purposes that may be made.
4. Continue to evaluate investment strategies and determine the maximum affordable payout and lowest reasonable fee for each type of component fund.
5. Engage Board members and other community leaders in identification of and

presentations to potential donors who will make financial gifts at personally significant levels and encourage others to do the same.

- 6. Continue the administration of scholarships in accordance with federal law, and encourage the payment of scholarships over the four-year recommended time to earn a bachelor's degree.



- 7. Solicit grant proposals that address broad needs and substantive concerns in order to achieve significant and measurable impact.
- 8. Continue essential operating support to reliable human service agencies that are implementing strategic and fundraising plans that deliver effective program services and are sustainable.
- 9. Identify a project of significance for one-time or multi-year support that clearly makes a difference to the quality of Tipton County life.
- 10. Make the Conference Center available for the



use of charitable and civic organizations, businesses for training but not sales activities, and community information meetings and celebrations.

### OPERATIONAL PRIORITIES

- A. The Foundation will commission studies *in collaboration with all of our partners in Education*: the public school systems, the Extension Education Center, pre-schools, homeschooling parents, Indiana University Kokomo and Ivy Tech (as well as Ball State, Purdue, and other popular college choices of Tipton County students), youth-serving organizations, and agencies and churches that offer adult education from time-to-time.
  - The first study will survey recent alumni of Tipton and Tri-Central schools regarding their perceptions of the strengths and weaknesses of their overall experience and preparation

- The other study will examine ideas about programs and structure for the next generation.
- B. While continuing to support innovative educational projects of the public schools and granting funds for faculty appreciation, the Foundation will seek proposals for enhancement of the opportunities for enrichment at each level, including pre-school, summer programs, online learning, nontraditional studies, etc.
- C. Concerns of the Aging will be addressed in a comprehensive way, including caregiving, transportation, access to medical care, housing, etc.
- D. Nutritional concerns, Behavioral and Mental Health concerns, Health Education regarding Breast Cancer and Heart Disease, Addiction, and other concerns that may be brought to TCF's attention will be assessed and addressed.
- E. Relationships with the United Way will be fostered as its fundraising succeeds: in-company campaigns, Call 2-1-1 Referral, Kindergarten Countdown, Income Tax Preparation, etc.
- F. Address Cost Containment and Demographic Changes that may affect the Foundation's growth, such as: Shrinking Population of-Donor Base/Prospects (Age 20-50 Especially) and the loss of Small Businesses



### OTHER IMPORTANT ACTIVITIES

- Thirtieth Anniversary Observance Recognizing Volunteers and Significant Donors and Grants
- Enhance the Perception of TCF: Who We Are and What We Do
- Help to Build a Sense of Community, considering Tipton County residents who work and primarily donate elsewhere; Employees who earn their living in Tipton County, but reside and primarily donate elsewhere.





Ducky Day in  
Tipton Park



Tea and Grantmaking



Encourage  
Memorial and  
Tribute Gifts

Scholarship Information



*(and College Info  
for Juniors)*  
Programs



Contact with  
Alumni and  
"Snowbirds"

Volunteer Training for  
TCF and Other  
Interested  
Organizations



Assess Staffing  
Needs

Youth Philanthropy,  
Youthworker Cafés;



Relationships  
with school  
officials,

teachers, and students;  
Days of Service



Agribusiness  
Development  
Projects

Social Media •



Newsletters •

Website • Special  
Mailings • Use of

Email Addresses

Continually examine



critical issues for  
the future