



driving community transformation

GIVING GUIDE



CONGRATULATIONS!

You are one step closer to transforming your community.

Innovia means “innovative way”— our name is a promise to forge new paths and drive sustainable change. Innovia Foundation connects donor generosity to our region’s most pressing causes and collaborates with community partners to drive transformation across Eastern Washington, North Idaho and beyond.

We are delighted that you are joining us in our mission of driving community transformation. Just like us, you are a problem solver. You are relentless and observant — and you want to make a difference. This giving guide provides the information you need to determine how you can achieve your philanthropic goals.

INVESTING IN THE INLAND NORTHWEST

We are passionate about the communities in our region! As the community foundation for Eastern Washington and North Idaho, we ignite generosity that transforms lives and creates vibrant and sustainable communities. We work together to identify, address and solve our region's problems, help those in need and leave a lasting impact.

WE BELIEVE in the power of your generosity! We learn about you and your interests, so we can help you make a difference and create a lasting legacy.

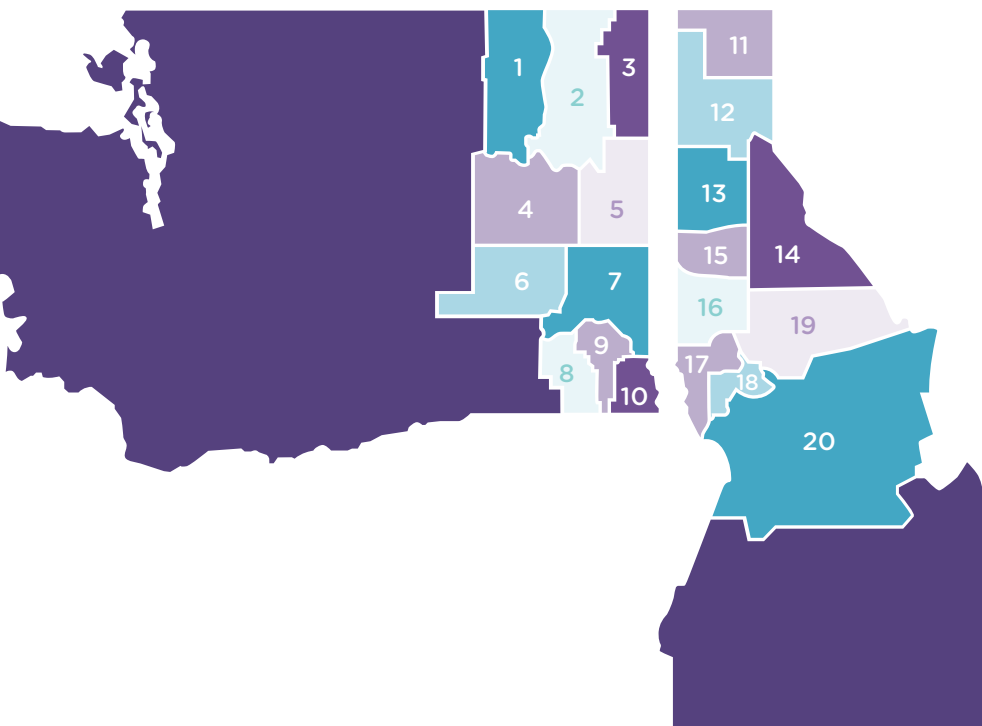
WE BELIEVE in the power of nonprofits to weave the social fabric of our communities. We work with many organizations and can connect you to the region's most pressing causes and greatest opportunities.

OUR VISION is vibrant and sustainable communities where every person has the opportunity to thrive. Join us in transforming lives and communities in our region, now and forever.



MEET OUR COMMUNITIES

We are the community foundation for Eastern Washington and North Idaho.

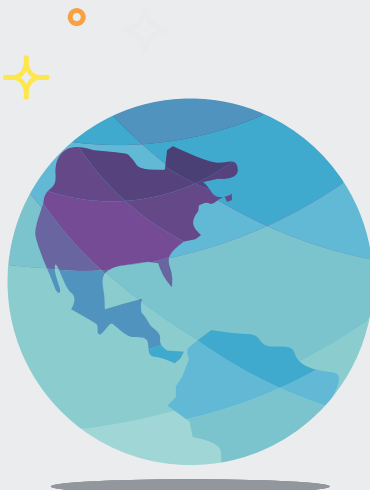


Washington

- | | |
|-----------------|-------------|
| 1. Ferry | 6. Adams |
| 2. Stevens | 7. Whitman |
| 3. Pend Oreille | 8. Columbia |
| 4. Lincoln | 9. Garfield |
| 5. Spokane | 10. Asotin |

Idaho

- | | |
|--------------|----------------|
| 11. Boundary | 16. Latah |
| 12. Bonner | 17. Nez Perce |
| 13. Kootenai | 18. Lewis |
| 14. Shoshone | 19. Clearwater |
| 15. Benewah | 20. Idaho |



We connect donor generosity to important causes, not only within our 20-county service region but also around the state, across the country and all over the world. When our donors have a cause they're passionate about, we help find a way to help them make a meaningful impact.

OUR IMPACT AREAS



CIVIC ENGAGEMENT

Working together to identify and address local needs and priorities

Every community has unique challenges and opportunities. We know that complex problems can be tackled best through honest and committed partnerships with community members from diverse backgrounds and experiences. Together, we identify local priorities and create solutions to drive community transformation.



EDUCATION AND YOUTH DEVELOPMENT

Promoting success through education

Quality education has the power to change lives. We provide opportunities for success to children and adults by ensuring they receive the education and support they need to learn, grow and thrive.



HEALTH AND WELLBEING

Helping people live healthier, happier lives

Healthy individuals make up a healthy community. We strive to ensure everyone's basic needs are met, and we look for areas where we can help people achieve healthier, happier lives.



ECONOMIC OPPORTUNITY

Catalyzing innovation and collaboration to support and strengthen our economy

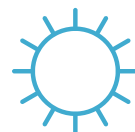
Economic opportunity opens the door to a brighter and more sustainable future for individuals, families and entire communities. We catalyze innovation and collaboration to support and strengthen our economy.



ARTS AND CULTURE

Creating vibrant and accessible cultural and enrichment experiences for all

The arts inspire us and bring creativity and joy to our communities. We look for ways to create vibrant and accessible cultural and enrichment experiences for all.



QUALITY OF LIFE

Protecting and improving what makes our part of the world special

We love living in our beautiful, lush region and are passionate about protecting and preserving the spaces, places and environments that make our part of the world so special.

ADVANTAGES OF GIVING THROUGH INNOVIA FOUNDATION

Innovia Foundation offers a range of services to enhance the impact of your charitable giving.

The following information gives you an idea of some of the advantages of working with Innovia Foundation.

CHARITABLE GIVING OPTIONS

Innovia Foundation	Private Foundation
Income Tax Deduction.	
Cash Gifts Up to 60% of adjusted gross income (AGI).	Cash Gifts Up to 30% of adjusted gross income (AGI).
Publicly Traded Securities Fair market value up to 30% of AGI.	Publicly Traded Securities Fair market value up to 20% of AGI.
Real Estate and Closely Held Securities Fair market value up to 30% of AGI.	Real Estate and Closely Held Securities Cost basis up to 20% of AGI.
Tax Considerations	
Tax Status 501(c)(3) public charity, provides more favorable tax status. The fund is a component of a public charity.	Tax Status 501(c)(3) private foundation tax status is not as favorable as public charity status.
Private Foundation Excise tax No excise tax requirement. Your invested contribution grows tax-free.	Private Foundation Excise tax Yes, 1 - 2% excise tax is assessed on net investment income. Substantial excise taxes are imposed for failure to meet payout requirement and for engaging in certain prohibited transactions such as self-dealing.
Tax Returns and Audits The community foundation files tax returns and conducts audits.	Tax Returns and Audits Must be performed by foundation managers or professional accountant.

Innovia Foundation

Private Foundation

Administrative Requirements

Payout Requirement

None.

Payout Requirement

Yes, at least 5% of net asset value annually.

Fund Administration

Community foundation staff provides administrative services (fund management, donor assistance with complex gifts or trusts, gift processing, grant report tracking and publicity). Online giving available.

Fund Administration

Administrative services must be performed by board members or officers ("foundation managers") or hired staff or consultants.

Ongoing Costs

Cost for administrative services, legal fees and accounting/auditing expenses are covered by a nominal annual fee.

Investments are pooled to be managed by fund managers specializing in long-term endowment investment strategies at a nominal cost. Donor/agency can recommend an investment manager for funds with more than \$500,000.

Ongoing Costs

The nonprofit assumes the costs of ongoing fees for legal assistance, accounting/auditing and investment management. These costs must be controlled and managed in relation to the amount spent each year on grantmaking.

Investment responsibility lies with board members or officers and foundation managers with assistance from professional investment manager(s).

Endowment Distribution

The establishing fund agreement determines the amount that is distributed each year. The community foundation follows the Uniform Prudent Management of Institutional Funds Act and considers the "best practice" to be a 4% payout on a 13 quarter rolling average.

Endowment Distribution

Foundation board members or officers must establish its own spending policy that includes, at a minimum, distributing at least 5% of net asset value annually, regardless of earnings and despite a desire to protect principal or grow the corpus of the investment.

Reporting

Community foundation handles reporting.

Reporting

Annual IRS 990 tax form must be filed.

Anonymity

Yes – Donors can request full anonymity, if desired.

Anonymity

Substantial contributors' name(s) must be disclosed.

Full Range of Planned Giving Opportunities

Yes – No additional fee. The foundation provides special services to nonprofits with endowments including a Legacy Society and programs that promote the endowment. Foundation staff provide support and advice for planned gifts at no additional fee.

Full Range of Planned Giving Opportunities

Additional legal fees.

DONOR FUND TYPES

As an Innovia Foundation donor, you have various options for how you can work with us. We provide different fund types, each with unique characteristics and opportunities, for you to choose from. The chart below provides an overview of the different fund types at Innovia Foundation.

Transformational Work		Community	
We believe strategic investment in data-influenced initiatives will transform the lives and communities in our region.		We believe that addressing core issues important to the communities in our region empowers individuals and communities to grow and flourish.	
Named Civic Leadership Fund	Named Partnership Fund	Greatest Needs Fund	Area of Interest Fund
Why choose this fund type?			
You want to support local priorities and solutions that result in vibrant and sustainable communities.	You want to support Innovia Foundation's mission to ignite generosity that transforms lives and communities.	You want to support the strongest project proposals from local nonprofit organizations to drive community transformation.	You want to support the strongest project proposals from local nonprofit organizations to drive community transformation in a specific area of interest.
Annual fee			
1.5%	1%	1.5%	1.5%
Gift minimum			
\$25,000	\$10,000	**\$5,000	\$10,000
Earns interest?			
YES	YES	YES	YES
Donor or advisor recommends grants/distribution?			
NO	NO	NO	NO

**Seed funding options available.

Donor Directed

We believe donor generosity is a powerful catalyst for transformation and should be supported by flexible advised funds invested to maximize your philanthropy. We believe our role as a community foundation is to support and empower your generosity.

Donor Advised Endowed Fund*

Donor Advised Pass-Through Fund

Designated Fund

You want to support your favorite nonprofits, schools, church and other projects that benefit the community, in amounts you choose.

*Your fund is invested and you earn interest for long-term grantmaking.

You want to support your favorite non-profits, schools or church, year after year for generations.

Agency

We believe in the long-term viability of the non-profit organizations that serve our region, and that robust, diversified endowments ensure the longevity of our agency partners.

Agency Fund

Agencies entrust Innovia Foundation to help grow their endowments to support their missions. We can help you plan a gift to an agency fund.

Scholarship

We believe scholarships that support student educational achievement will transform our communities for generations to come.

Scholarship Fund

You want to support students from the Inland NW with scholarships to attend colleges, universities or vocational schools in the region or beyond.

1.5%

No fee

1%

1%

2% (other fees may apply)

**\$10,000

\$10,000

\$10,000

\$10,000

\$25,000

YES

NO

YES

YES

YES

YES

YES

NO

OPTIONAL

Donor may have limited input to selection

WE DRIVE COMMUNITY TRANSFORMATION

INNOVIA FOUNDATION, THE COMMUNITY FOUNDATION FOR EASTERN WASHINGTON AND NORTH IDAHO

Community foundations are grant making public charities devoted to improving the lives of people in a defined local geographic area. Community foundations help local philanthropists of all income levels create or support permanent charitable funds that issue grants to the causes and organizations they love. Community foundations are especially good vehicles for carrying out donors' legacy giving plans.

INNOVATIVE PROBLEM SOLVERS SERVING OUR REGION

Community foundations play a key role in identifying and solving community problems. Through grant making, advocacy, research and civic leadership, community foundations leverage the resources in communities to address the most important issues and challenges. More than 750 community foundations operate in urban and rural areas throughout the United States.

Innovia Foundation has earned the official National Standards Seal from the Community Foundations National Standards Board which confirms operational excellence in six key areas.

1. Mission, structure, and governance
2. Resource development
3. Stewardship and accountability
4. Grant making and community leadership
5. Donor relations
6. Communications

EMPOWERING DONOR GENEROSITY

Innovia Foundation works with individuals, families, attorneys, and estate and financial planners to design gift plans tailored to meet diverse economic situations, maximizing the benefit donors receive from their contributions, as well as the impact of their philanthropic dollars.



HELP MAKE YOUR PART OF THE WORLD BETTER

Become a donor today!

INVEST IN US

When you make a contribution to the Partnership Fund or Civic Leadership Fund at Innovia Foundation, your gift supports our work transforming lives and creating vibrant and sustainable communities where every person has the opportunity to thrive.

GIVE TO AN IMPACT AREA

Innovia Foundation has identified several impact areas that address specific challenges in our region. Our expertise and network allow us to connect you to a cause you care most about and combine your investment with the strength of others.

DEVELOP YOUR OWN FUND

When our donors are passionate about a cause, we help them find ways to make a lasting difference. If you have a specific vision for your donation, we will help you make it a reality.



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DONATE OR LEARN HOW TO PARTNER WITH US

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