



AMERICA'S BEST INVESTMENT

Your donation to the Baldrige Foundation can help us reach more hospitals, schools, communities, and small businesses to help them improve their performance.

This makes Baldrige America's best investment!

Giving Guide

Learn about ways to support

WAYS TO GIVE

America's Best Investment

Our opportunities include:

- Giving Tuesday
- Growth of Baldrige
- Combined Federal Campaign
- Planned Giving
 - Bequests by Will
 - IRA Retirement
 - Charitable Trusts
 - Annuity/Life Insurance
 - Real Estate
 - Appreciated Securities
 - Remainder Unitrust
 - Pooled Income Fund
 - IRA Charitable Rollovers
- RoundUp
- Matching Gifts

Visit our website at www.baldrigefoundation.org for more information about ways to give.

Email us at [jraccette@baldrigefoundation.org](mailto:jracette@baldrigefoundation.org) for inquiries.

THE BALDRIGE IMPACT



America's Best Investment

AREAS OF IMPACT

Baldrige changes lives through improved education for our children, better healthcare practices that heal patients, more efficient processes that allow companies to produce products for the consumer of higher quality and lower cost, and enhanced preparedness to prevent and respond to cybersecurity breaches.

HOW YOU CAN HELP

You can make an impact on America's future through your planned gift, traditional gift, or to the Baldrige Foundation. Through this option, you have the ability to make a charitable gift today or in the future, using wills, charitable trusts, annuities, or bequests. Based on your personal tax, financial, and planning needs, we will work with you to determine which type of gift would be best.

Do you want to support Baldrige but worry that you will not have enough income for yourself and your family? Life income gifts such as gift annuities and charitable trusts can provide you with an income stream, significant tax savings, and the satisfaction of supporting the Baldrige Foundation in changing lives. If you are still raising your family, or just getting started in your career, naming The Baldrige Foundation in your will is a wonderful way to support our efforts and our mission for years to come.

Visit our website at www.baldrigefoundation.org for more information about ways to give.

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#GivingTuesday

A GLOBAL GENEROSITY MOVEMENT

#GivingTuesday started as a movement in 2012. The goal is to fundamentally shift the sentiment around this time of year, from buying to giving – from selfish to selfless – from focusing on the economy to focusing on the community.

Your gift helps us to promote the Baldrige Framework to more schools, hospitals, nonprofits, government agencies, and businesses. In doing so, you are empowering thousands of organizations in health care, education, manufacturing, and government who are using the Baldrige Framework to save lives by increasing the quality and access to health care, transform lives by improving K-12 and higher education, and create jobs and strengthen our economy.

To show our appreciation for your gift we will recognize your generosity by including your name as a supporter in the latest edition of the Journal of Performance Excellence. But the real motivation ought to be giving because, a little bit at a time, step by step, you will be changing the world for the better. As Mahatma Gandhi said, “The simplest acts of kindness are by far more powerful than a thousand heads bowing in prayer.”

On this Giving Tuesday, let's remember those people whose lives are longer, healthier, and full of opportunity because of 30+ years of Baldrige, and give so that tomorrow and every day, Baldrige continues to be the premier framework for organizational performance excellence!

For questions about how you or your organization can support the Baldrige Foundation on Giving Tuesday please email Josh Racette, Executive Director of Corporate Development, at jracette@baldrigefoundation.org.



Josh Racette
Executive Director of Corporate Development

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1717 Pennsylvania Ave. NW, Suite 1025
Washington, DC 20006

Office (202) 559-9195 , Cell (614) 563-2024
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Growth of Baldrige

AMERICA'S BEST INVESTMENT

The purpose of the Foundation for the Malcolm Baldrige National Quality Award is to continuously improve the quality of life.

Your contribution helps to ensure the long-term financial growth and viability of the Baldrige Performance Excellence Program, and to support organizational performance excellence in the United States and throughout the world.

Contributing to the Growth of Baldrige can be accomplished with your one-time donation or with your recurring donation. Your donations will be unrestricted allowing us to make the most impact where your donation is needed the most.

Together with our stakeholders, we will create value through research and deployment of the latest cutting-edge management practices. We will focus on the future and manage for agility, innovation, and creativity.

We hope that you consider supporting the long-term success of Baldrige by donating to our Growth of Baldrige Campaign.

To learn more or to donate to the Growth of Baldrige

Visit www.baldrigefoundation.org

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Combined Federal Campaign

The Foundation for the Malcolm Baldrige National Quality Award is a proud member of the Combined Federal Campaign (CFC) as charity #23918.

The mission of the CFC is to promote and support philanthropy through a program that is employee-focused, cost-efficient, and effective in providing all federal employees the opportunity to improve the quality of life for all.

Beginning in 2015 the Baldrige Foundation has qualified for inclusion in the Combined Federal Campaign (CFC), which allows federal employees to designate tax-deductible contributions through payroll deductions for any one of thousands of approved, listed charitable organizations. By gaining inclusion to the CFC, the Foundation has access to more than 2.7 million federal employees that may designate portions of their salaries to the Foundation.

Pledges can be made from September 1 – January 15.

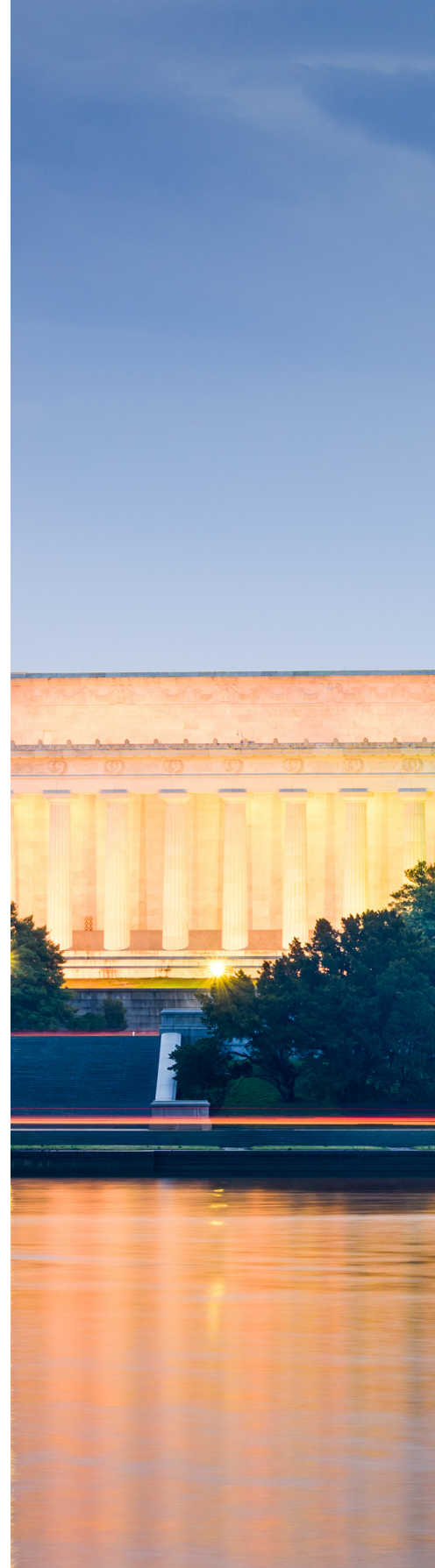
To enroll, visit <https://cfcgiving.opm.gov/welcome>.



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Planned Giving

AMERICA'S BEST INVESTMENT

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Thinking about the future

Do you want to support Baldrige but worry that you will not have enough income for yourself and your family? Life income gifts such as gift annuities and charitable trusts can provide you with an income stream, significant tax savings, and the satisfaction of supporting the Baldrige Foundation in changing lives. If you are still raising your family, or just getting started in your career, naming The Baldrige Foundation in your will is a wonderful way to support our efforts and our mission for years to come.

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Planned Giving

WAYS TO GIVE

Bequests by Will

Naming the Baldrige Foundation as a beneficiary in your will is simple, can provide estate tax advantages, is revocable, can be for any amount you wish, and can name any assets including real property. You can honor a loved one by naming the bequest in honor or in memory of them.

IRA/Retirement

Naming the Foundation as the beneficiary of an IRA or a retirement plan can be an excellent way to reduce the tax impact on your estate and family members. Not only will the retirement plan escape taxation, but it will pass to the Foundation without reduction for income taxes, saving your beneficiaries from the possibility of income tax on your retirement savings. We would be delighted to speak with you about these and other options, including gift annuities. (See [IRA Charitable Rollovers](#))

Charitable Trusts

A transfer to a Lead Trust will provide the Foundation with an annual payment over a period of years. At the end of the term, the trust asset will pass to the donor or the donor's children. A Remainder Trust provides the donor with annual payments over a period of years. At the end of the term, the trust assets pass to the Foundation. Both types of trusts can offer the donor an income tax deduction for a future gift.

Annuity/Life Insurance

Life insurance makes it possible for anyone to make a meaningful gift. A donor can name the Foundation as the beneficiary of a policy while retaining ownership of the policy, or the donor can donate the policy to the Foundation. Donors may receive an income tax deduction when they donate a policy.

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Planned Giving

MORE WAYS TO GIVE

Real Estate

A donor can make a Gift of Real Estate to a nonprofit, removing a large taxable asset from their estate and benefiting by receiving an income tax deduction equal to the appraised fair market value of the property, with no capital gains tax due on the transfer.

Appreciated Securities

Publicly traded Appreciated Securities that a donor has owned for more than one year can be transferred to the Baldrige Foundation. The Baldrige Foundation then sells the securities and keeps the proceeds, which can be applied to whatever purpose the donor designates. The donor gets an income tax charitable deduction based on the fair market value of the securities while also avoiding capital gains tax. It's an easy gift to make and an easy gift to take!

Remainder Unitrust

A Charitable Remainder Unitrust is a charitable trust that pays a percentage of its principal to the donor and/or other income beneficiaries the donor names for life, for a term of up to 20 years, or for a combination of both. Because it is revalued annually, payments may increase over time. The donor receives a charitable income tax deduction for a portion of the value of the assets placed in the trust. After the Charitable Remainder Unitrust terminates, the balance goes to the Baldrige Foundation.

Pooled Income Fund

With a Pooled Income Fund, a donor's gift is pooled with gifts from other donors who support the same non-profit (Baldrige Foundation) and then invested to pay each donor a quarterly income calculated from their share of the fund. As each participant passes away, the nonprofit receives a gift in the amount of that donor's share of the fund. Donors can avoid capital gains tax by using appreciated assets for their gifts.

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IRA Charitable Rollovers

OTHER WAYS TO GIVE

When you are 70 ½ or older and own an IRA there is a great donation option through the Individual Retirement Account (IRA) Charitable Rollover.

Taxpayers can direct the custodian of their pre-tax traditional or Roth IRA to transfer up to \$100,000 per year to a public charity such as The Foundation for the Malcolm Baldrige National Quality Award (Baldrige Foundation) without having to count that distribution as taxable income.

In order for a donation to qualify under the law, you must instruct your financial advisor, bank, or IRA administrator to transfer funds from your traditional or Roth IRAs directly to the Baldrige Foundation and identify you as the IRA account owner/donor, with your name and address on the distribution check or accompanying materials and send it to:

The Foundation for the Malcolm Baldrige National Quality Award
1717 Pennsylvania Ave. NW, Suite 1025
Washington, DC 20006
Tax ID: 59-2891462

Distributions from your traditional or Roth IRA made directly to the Baldrige Foundation can satisfy all or part of this year's required minimum distribution.

Thank you for your consideration!

To learn more about this opportunity with the Baldrige Foundation please schedule an appointment with Josh Racette, Executive Director of Corporate Development.

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Frequently Asked Questions

PLANNED GIVING

- **What are the benefits of a charitable bequest?** You can make a gift that costs you nothing during your lifetime and keeps your assets under your control. You are always able to change your bequest if your circumstances change. Your bequest lets us know that you believe we will be supporting performance excellence far into the future.
- **How can I make a bequest to your organization on behalf of performance excellence?** You can give a specific amount of money or an item of property, or give a percentage of the balance remaining in your estate after taxes, expenses, and specific bequests have been paid. You can tell us to use your bequest for a particular program or activity or allow your bequest to be used for the needs and opportunities that are most relevant to the Baldrige Foundation performance excellence-related initiatives when your gift is received.
- **When do I need to change my will?** If you already have a will, here are some everyday events that might cause you to change it: marriage or remarriage; divorce or the death of a spouse; a new baby, stepchildren or grandchildren; the death of named heirs; the sale of your house, a family business, or any asset that made up a large part of your estate; adjustments in distributions to your heirs to account for lifetime gifts, or the anticipated need of others for ongoing care after your death; interest in adding or changing a charitable beneficiary.
- **What is the exact bequest language I should use in my will?** The following is intended to help you in drafting a bequest that satisfies your individual interests. As you consult your attorney on the selection of appropriate wording to reflect your own goals and intentions regarding the Baldrige Foundation, be sure the organization's correct legal name appears in all final documents as:
 - **Unrestricted Gift:** A gift that can be used where the need is greatest I give and devise to The Foundation for the Malcolm Baldrige National Quality Award, INC. (Tax ID # 59-2891462) located in Washington, DC, the sum of \$(name amount here)* or (name asset here) to be used for its general support of its mission.
 - **Residuary Bequest:** Leaves any remainder after all other bequests have been paid I give and devise to The Foundation for the Malcolm Baldrige National Quality Award, INC. (Tax ID # 59-2891462) located in Washington, DC, (insert percentage amount) percent of the residue of my estate to be used for its general purposes.
 - **Contingency Gift:** Takes effect only if a primary intention can't be met In the event that (insert name) predeceases me, I give and devise his/her bequest or share to The Foundation for the Malcolm Baldrige National Quality Award, INC. (Tax ID # 59-2891462) located in Washington, DC, to be used for its general purposes.

Although legal questions should be referred to an attorney, The Foundation for the Malcolm Baldrige National Quality Award, INC. is willing to help with any questions you may have about our Foundation or giving opportunities. If you have questions, please call the Baldrige Foundation Office of Development at 202-559-9195.

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Round Up

CORPORATE OR INDIVIDUAL

Support Performance Excellence by Rounding UP

Our Round-Up program is a great way for organizations or individuals to support the Baldrige Foundation. Donating the spare change from your credit or debit card purchases allows us to support organizational performance excellence in the United States. You can either leave the Round-Up amount each month unlimited or cap it a certain dollar amount. You are in total control! Now you can support Baldrige all year around through micro-donations that make a big difference for us.

1. Create Your Account

Just fill in your name, email address and a password of your choosing and you're all set.

2. Link Your Cards and Bank

Connect your credit or debit cards to the app and securely authorize RoundUps with your bank.

3. Make an Impact

The extra change from each transaction you make will be "rounded up" and donated every month to Baldrige Foundation.

Sign up in three easy steps by visiting <https://roundup.app/p/baldrigefoundation>

For questions about how you or your organization can support the Baldrige Foundation on Giving Tuesday please email Josh Racette, Executive Director of Corporate Development, at jracette@baldrigefoundation.org.

ROUNDUP APP

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Matching Gifts

WORKPLACE GIVING

Understanding the Basics

Corporate matching gifts are a type of philanthropy in which companies financially match donations that their employees make to nonprofit organizations. When an employee makes a donation, they'll request the matching gift from their employer, who then makes their own donation. Companies usually match donations at a 1:1 ratio, but some will match at a 2:1, 3:1, or even a 4:1 ratio.

Why do Companies Match Donations?

Companies of all sizes match donations their employees make to nonprofits because it's an easy, structured way for them to support good work in their communities. CSR, or corporate social responsibility, is an important factor in how the public perceives brands and companies these days.

How to get started?

1. Ask your employer if the Baldrige Foundation is eligible for Matching Gift support.
2. Determine at which dollar amount you would like to support the Baldrige Foundation.
3. After you have made your donation to the Baldrige Foundation, submit to your employer the donation information for them to make their Corporate Matching Gift.

We are happy to help support you if you have any questions. Please email Josh Racette, Executive Director of Corporate Development, at jracette@baldrigefoundation.org.

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Partnering to Support America!

Full Name _____
Address _____
City _____ State _____ Zip Code _____
Email _____ Phone _____

This is a tribute gift "In Honor" or "In Memory of"
Name and Relationship, if applicable

Provide the name address of the person you would like us to notify of your tribute (optional)

Prefer to Give Online?
Support Baldrige safely and conveniently online where you can make one-time or monthly recurring credit card donations.
<https://baldrigefoundation.org/contribute>

Matching Gifts?
Does your company have a matching gift program? if so, please let us know by enclosing a matching gift form with your donation. Or, email it to us at jracette@baldrigefoundation.org.

Checks should be payable to Baldrige Foundation

Mail Checks to
1717 Pennsylvania Ave. NW, Suite 1025
Washington, DC 20006

To learn more about all of our opportunities to support please contact Josh Racette, Baldrige Foundation, Executive Director, Corporate Partnerships at jracette@baldrigefoundation.org or 202-559-9195.

To authorize us to charge your credit card, please provide the following:
Single Donation \$ _____ / Monthly Donation \$ _____ x _____ mo.
Credit Card # _____
Exp Date _____ / _____ Security Code _____
Signature _____



IMPORTANCE OF BALDRIGE

"America's economic strength depends on industry's ability to improve productivity and quality and to remain on the cutting edge of technology, and that's why the Malcolm Baldrige National Quality Award is so important."

RONALD REAGAN
PRESIDENT OF THE UNITED STATES



www.baldrigefoundation.org | www.baldrigeinstitute.org

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