

# WHY YOUR GIFTS MATTER

*Investing in Excellence and Improving the Quality of Life!*



*BALDRIGE - America's Best Investment*

[www.baldrigefoundation.org](http://www.baldrigefoundation.org)



INSTITUTE FOR PERFORMANCE EXCELLENCE

[www.baldrigeinstitute.org](http://www.baldrigeinstitute.org)

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The Foundation for the Malcolm Baldrige National Quality Award, Inc. is a 501(c)(3) nonprofit organization | EIN  
59-2891462 | NAICS 813211 (Grantmaking) 611430 (Professional and Management Development Training) |  
DUNS 004808751

# INVESTING IN EXCELLENCE

*Thank you for caring!*

2020 has navigated us all into some uncharted waters! Through it all the Baldrige Foundation has continued our mission of supporting performance excellence and improving quality of life. Our mission is more important than ever. To help bridge the performance excellence gap virtually, we launched the Institute for Performance Excellence to include a catalog of training & certification courses to support workforce development. As we come closer to the end of the year our focus is on continuing this very important work and we humbly request your support as we look ahead to 2021. During this time, we try to help our donors simplify their giving approach by providing you some important information to guide your philanthropic decisions.

We want to let you know about a few key provisions of the new CARES (Coronavirus Aid, Relief, and Economic Security) Act. This new law is designed to help you, businesses and nonprofits facing economic hardship during the coronavirus pandemic.

- The new law temporarily suspends the requirements for required minimum distributions (RMD) for the 2020 tax year. This probably comes as a relief to many of you who would have had to withdraw a greater percentage of your retirement accounts. Many of our donors use their RMD to make a gift from their IRA. If you are 70½ or older, you can still make a gift from your IRA or name us as a beneficiary. In addition, there are some new ways you can receive financial benefits and help the Baldrige Foundation.
- The new law allows all taxpayers to take a charitable deduction of up to \$300, even if you do not itemize. You might think that this is a small amount and would not make a difference. But what if all of our donors gave “just” \$300? Such support would have a huge impact on those we serve.
- For those who do itemize their deductions, the new law allows for cash contributions to qualified charities such as ours to be deducted up to 100% of your adjusted gross income for the 2020 calendar year.
- We also recognize all planned giving donors on our virtual donor recognition wall which can be found on our website.

We are grateful for your generosity, which touches and changes so many lives. Please contact Josh Racette, Executive Director of Corporate Development at [jraccette@baldrigefoundation.org](mailto:jracette@baldrigefoundation.org) or 202-559-9195 to discuss how your gift can help further our mission. I thank you so much for your support!

Best regards,



**Al Faber**  
**President/CEO**  
**Baldrige Foundation**





# THE BALDRIGE IMPACT MATTERS

UNDERSTAND HOW YOUR SUPPORT HAS  
MADE A DIFFERENCE OVER THE YEARS



## AMERICA'S BEST INVESTMENT

820 to 1: Ratio of Baldrige Program benefits for the U.S. economy to program costs makes the Baldrige program a great choice for those measuring how their monetary gift is used responsibly.



## JOBS IMPACTED BY BALDRIGE

Your gift will make an impact across your local community and all of the United States. From 2010-2019, Baldrige has impacted 650,093 jobs. 3,209 work sites, over \$181 billion in revenue/budgets, and about 590 million customers served.



## VOLUNTEERED SERVICES

348 Baldrige examiners volunteered roughly \$7.8 million in services in 2019. State Baldrige-based examiners volunteered around \$29 million in services in 2018. Your gift directly makes an impact.



## LEADING AMERICA

More than 121 Baldrige Award recipients serve as national role models. With your support, more organizations can become national role model organizations helping to positively stimulate the United States economy.



## YOUR SUPPORT MATTERS

100% of your donation goes toward ensuring 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.



# YOUR SUPPORT MADE A DIFFERENCE IN 2020

## INSTITUTE FOR PERFORMANCE EXCELLENCE



### Formation of the Institute for Performance Excellence

The Foundation's Institute for Performance Excellence is a thought leader on performance excellence, leadership, and management. Our team carries out this mission in a number of ways: undertaking research projects, hosting conferences and activities, conducting executive-level training, and publishing and distributing a wide variety of educational materials. The Institute's mission is to improve the practices of leadership and management in pursuit of performance excellence and its impact in an ever-changing world.



### Education Opportunities

From the support of our donors the Baldrige Foundation is helping to create online training and certification programs that are providing critical workforce development infrastructure to the U.S. economy. These programs are rooted in lean and six sigma and focused on providing real world case studies to enhance the learning experience.



### Leadership Development

An investment in excellence from you helps the Baldrige Foundation create learning resources such as webinars, podcasts, white papers, and unique organizational performance excellence offerings to include classroom and online training.



### Networking Opportunities

The Baldrige Foundation, through the Institute for Performance Excellence, is creating a vast networking group of individuals focused on caring about organizational performance excellence and sharing best practices to accelerate organizational learning.



### Strategy Execution Resources

Your support helps us to continue partnering with industry leaders, consultants, and tools that will help organizations and employees optimize strategic objectives, operational effectiveness, and cultural readiness by closing the elusive knowledge, performance, and visibility gaps via implementing a Strategy Execution System.



# PLANNED GIVING WITH BALDRIGE

## Align your legacy with excellence! An investment in saving, transforming and enriching lives...

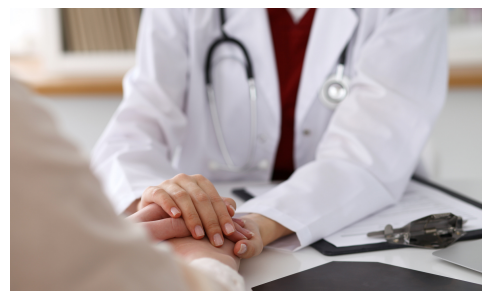
### Areas of Impact

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 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.



## What giving options do I have?

### Bequest 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.

### 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.



# 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 Baldridge safely and conveniently online where you can make one-time or monthly recurring credit card donations.

<https://baldridgefoundation.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 [jraccette@baldridgefoundation.org](mailto:jracette@baldridgefoundation.org).

Checks should be payable to Baldridge 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, Baldridge Foundation, Executive Director, Corporate Partnerships at [jraccette@baldridgefoundation.org](mailto:jracette@baldridgefoundation.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



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