

Leading Tactics for Rural Fund Development

FOCUS A

Understanding and Leveraging Endowment in and for Your Community

TACTIC 3

Seek challenge matches for fund gifts

What is it?

One way to get people to give to your community fund is to offer them the incentive that you have a “match” for every dollar they give. Offering donors a match is one of the most effective tools in building endowment, whatever the source of the match or the purpose for the endowment.

A *challenge match* is a significant donation that someone pledges to give to your endowment fund if you are able to secure a certain amount from your other donors to “match” it. Often referred to as a challenge grant, these challenge matches can come from other foundations, businesses or individuals—or from your own discretionary funds. In rural communities, foundation boards typically seek match commitments from individual donors who care about the community and who want to challenge others to help build the endowment.

Meeting a challenge can be a good way to get a rural endowment fund started and to grow it quickly to a respectable size. Challenges are a great way to attract contributions over a limited period of time for a specific purpose, because people feel like they get more for giving when there is a match. They work because *both* the challenge grant donor *and* all the prospective donors who help you meet the

match really like to see their dollars leveraged. Because challenges give you a reason to talk about your endowment, they also offer your foundation or fund a great opportunity to educate people about what it is and what it offers your community. Challenge grants typically come with deadlines to convey a sense of urgency, so they also help motivate board members and supporters to ask—and to *give*.

Some very rural or very small communities use fundraising events to raise immediate funds from a wide range of people—as opposed to longer-term, large planned gifts from a few individuals—to match challenge grants. Other community foundations have used challenges to persuade likely-but-slow-to-act large donors that the time to contribute is *now*.

How does it *really* work?

Sources. Where do you find the match? There *are* times when donors will approach you and offer a match. But generally matches don't just walk in your front door. You have to look for them. Either your board must decide to dedicate some existing unrestricted funds to use for a match, or you have to go out and find a challenge grant or donation you can use as a match. And you have to make a case to your potential donor(s) that structuring their contribution as a match is a good idea that will make a difference in your community. Here are the typical sources that might provide a challenge match grant.

- **Local individual or family.** You may know a few people of moderate or significant wealth who want to give back to your community or to a specific cause—and who are intrigued by the idea of spurring others to give as well. For example, more than a dozen rural community fund affiliates of the Nebraska Community Foundation have successfully found local donors who have offered matches in the neighborhood of \$100,000 each to help grow endowments for their rural hometowns.
- **Local business.** Asking local firms to offer a challenge match sometimes can be much more attractive than asking them for outright contributions to endowment. It can add to the business's positive reputation by building their name recognition during your subsequent campaign to meet the match, and by positioning them as a good-guy company that gives back to the town—and thus, to the people who

live, work and shop there.

One example: In South Bend, Indiana, the African American Community Fund of the Community Foundation of St. Joseph County secured \$450,000 in leadership gifts from six local businesses to provide matching funds for gifts made from the entire community.

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Another example: In

Montana in the 1990s, a national beer producing firm offered a match challenge grant to community funds in towns across the state where they had distribution outlets. Of course, they did not think that up without some help and encouragement—in this case, from the Montana Community Foundation.

- **Family or corporate foundations.** Many families and corporations that have their own charitable foundations also have ties to a rural community and can be persuaded with the same argument as local businesses. This is true even for families that have moved away, businesses that are headquartered elsewhere, or those that have relocated but once were a key business in your town or region. Families or firms that realize their wealth was or is being built in your community and with your workers, may be willing to consider offering a match challenge. Note: Sometimes families or businesses that have moved away may not have a foundation, but still may be willing to contribute a match from their personal or corporate assets.
- **Private local,** regional or national foundations. Occasionally, private foundations—small or large—may provide a match to build community endowments. A match offers them a way to target their funds to a particular place and perhaps a particular issue, while offering leverage and the promise that by building a permanent endowment, their investment will continue to grow and produce good things over time. The Lilly Endowment has been providing endowment matches as part of a multi-year initiative to grow rural

community foundations across the state of Indiana. In the past, the Ford and Kellogg Foundations have packaged endowment matches into special initiatives that also supported rural development and youth development programs, respectively. A regional health conversion foundation is now helping match operating endowment growth for the resurging East Mississippi Community Foundation. The list goes on and on.

- **Government.** Believe it or not, sometimes government dollars are set aside to match the growth of community fund endowments. The state of Iowa recently passed legislation that provides \$25,000 in a dollar-for-dollar match for new rural community endowment funds that choose to affiliate with existing community foundations. Governments like the concept of investing in something that will give *forever* and, therefore, possibly reduce the demand on their resources in the future—what better than a permanent endowment? It’s a chance to tax and invest, instead of just tax and spend. At least you can ask!
- **Your own foundation’s funds.** If you simply can’t find an outside donor to provide a challenge grant, your board could designate some of your discretionary funds—if you have any—for a community challenge match. Alternatively, you could create a “Board Challenge” by pooling smaller contributions from the board into one sizeable fund that becomes the match. Public radio stations use this tactic all the time—they collect advance contributions from a group of donors to create a match challenge fund, and then promote the match to recruit givers and reach a dollar goal during a particular hour of fundraising.

Uses. Just as challenges can come from different sources, they can be used to build different types of endowed funds. Some donors challenge community foundations to raise funds that are restricted to specific needs or innovations; others prefer to leave the use up to you. For example, your challenge donor may specify that their challenge be used to build:

- **Endowed grantmaking funds,** either focused on a particular topic, or on a wide range of community issues

- **Organization (agency) endowments**, designated for use only by a particular nonprofit in your area
- **Your foundation's or fund's operating endowment**, to support ongoing staffing, office and administrative costs
- **Specific community or local affiliate endowment funds**

The Match Deal. Match challenges require that you raise a certain amount to draw down the match, however the structure of each match varies. And there are several variables to consider when working with your challenge donor—as well as with the donors who help you meet the match.

- **Ratio.** The amount of match dollars that will be offered for every contribution is usually described as a numerical ratio: for example, in a 2:1 match, the challenge donor provides \$2 for every \$1 raised. Challenge ratios generally range from 0.5:1 to 3:1.

As a rule of thumb, you want to stretch your match to attract as many local dollars as possible. So when someone offers you a challenge match grant for a set amount with a “rich” match, say 3:1 (\$3 from the match donor for every \$1 you raise from other donors for your endowment), you might want to convince them to lower it to 1:1—as long as you think that ratio will still attract local givers and you can meet the challenge. Why lower the ratio? Because it's a win all around: It will raise more endowed dollars and new givers for you, and it will offer the challenge donor even higher leverage.

Does this math seem confusing—or counterintuitive? If so, follow this example through: Generally, you rarely get an unlimited match challenge; rather, you get a set figure—for illustration, let's say your challenge donor promises \$10,000—and the donor has a match ratio in mind. If you have a limit of \$10,000 coming in for the match, the relevant question becomes: How far can we stretch that \$10,000 as an incentive? If the donor gives you \$10,000 and you use a 3:1 ratio, you end up with \$13,333. If you use a 2:1 ratio, you get \$15,000; if you use 1:1, you get \$20,000; at 0.5:1, you get \$30,000. Thus, when your challenge is for a set amount, the lower the match ratio you offer donors who help you meet the match, the more endowment you grow.

Community foundations and funds (especially new ones) looking to grow endowment get so excited by a generous match ratio that they forget other objectives (like more new donors) they might accomplish with it, and the fact that they will build a larger endowment if they make the match less generous. Even if the challenge grant donor has a rich match in mind, they might be persuaded to lower it if you show them this logic.

- **Timing.** Donors usually offer challenges over a limited time frame only. To make a challenge work well, you want a time frame that is not too short to get the job done, but not so long that you get lazy about it. In other words, you want a *sense of urgency* without a *sense of panic*.

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Keep in mind: You can indeed negotiate with some challenge grant donors in advance or during a challenge to either change or extend their time frame—as long as you present a reasonable case. Use this to your best result!

- **Type of contribution and donor.** One final variable is what kind of contribution to endowment will qualify for the match. Sometimes your challenge donor specifies this—but you can try to persuade them to do what makes the most sense for you. Some challenge donors want to match only current cash or assets that can be converted immediately into cash contributions; others may match planned gifts (like bequests) as long as they are irrevocable—and some will match both. Challenge donors may want to match contributions by new donors only, or perhaps contributions that are above or below a certain amount.

This means that if your donor is open to it and flexible, you can get very creative about using their match dollars to build certain kinds of endowment or to recruit certain categories of givers that are most important to your foundation or fund at the time of the challenge. So when you structure The Match Deal, think about the other objectives you have in mind to build your

community endowment. Have you had trouble getting new donors, or business donors, or people to give more than \$1,000? If you are trying to build new donor markets, or break some kind of logjam in the kinds of gifts people are willing to give, how can you target your challenge to turn the tide? For example, meeting a challenge with only two donors in one week may get it done quickly, but at the end of the day, how much *oomph* does only two new donors give to your efforts over the long term?

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- **Other match requirements.** Usually, challenge grants simply provide direct matches: a match amount for a contribution. In some cases, however, challenge donors (especially if they are foundations) may also provide you additional funding to conduct some new grantmaking or program activity while you are raising the endowment match. The idea behind this arrangement is that it provides an incentive for your foundation to fund or operate a new program (like youth engagement, helping local craftspeople learn business skills, or housing rehabilitation for working families) while simultaneously raising an endowment that will ensure the program continues after the match is met. This can be a wonderful opportunity to strengthen community efforts. Just be sure you are ready and willing to take on the extra work, and that the program area is one that is important to your central mission—else it may divert too much time and energy away from everything else your foundation or fund is doing!

Building helpful capacities

There are two sides of a match challenge effort. First you have to find the match donor. Then you have to run a campaign to meet the match.

Step right up What's your Match Deal?

There are many ways to find and to meet your match challenge—and each can produce a range of benefits beyond the endowed dollars. Here are just three simple examples to start you thinking about how you might construct your Ideal Match Deal.

	<i>Challenge source and amount</i>	<i>Challenge purpose</i>	<i>Local match requirement</i>
<p>Challenge 1—Field of Interest Endowment. This 1:2 challenge will produce \$30,000 in endowment focused on one important issue.</p>	<p>Source: Your fund or foundation has a donor who provides a challenge to address an issue they care about. Amount: \$10,000.</p>	<p>Establish a <i>field of interest endowment</i> that will fund grants to address a neglected community issue that the donor specifies, such as education, entrepreneurship or youth development.</p>	<p>Source: Your foundation or fund seeks new contributions of any size from community donors. Amount: \$20,000.</p>
<p>Challenge 2—Organization Endowments. This 1:1 challenge would produce \$10,000 in endowment and help start five new organization funds, with each organization recruiting brand new donors.</p>	<p>Source: Your community foundation or fund uses discretionary grantmaking funds or collects pledges from board members. Amount: \$5,000.</p>	<p>Encourage nonprofits to establish their own <i>organization endowment</i> funds with the community foundation.</p>	<p>Source: Your foundation or fund seeks five local nonprofits that will use the match incentive to raise funds from new donors to start their organization endowment funds. Amount: \$1,000 each.</p>
<p>Challenge 3 Operating Endowment. This 1:3 challenge will produce an operating endowment of \$200,000 and a host of constant donors.</p>	<p>Source: A local family foundation or business offers a challenge to your community. Amount: \$50,000.</p>	<p>Establish an <i>operating endowment</i> that your foundation can use for your staffing, office and administration expenses.</p>	<p>Source: You seek multi-year pledges of various sizes from at least 200 donors over three years. Amount: \$150,000.</p>

If you want to actively seek and meet a match, your board is a natural to lead in the campaign. Here are the primary components and capacities that will move your match forward.

Get a task force going. First, create a foundation task force or ad hoc committee of board members, and staff if you have any, to plan and run the effort. Invite others from the community to join the task force or help in some way—for example, individuals who know about community needs or specific issues, people who have some professional fundraising experience, or local leaders who are well connected. Think hard and long about including on the task force people whom you need to diversify your community participation and donor base—for example, youth and young adults, or people from a wider variety of racial and ethnic cultures—so that your task force reflects your entire community. Indeed, a match campaign is a good way to “hook” new people into your work for a limited time-commitment; if they say “yes” and it succeeds, they may become longer-term supporters—or even board members—in the future.

Imagine the kind of match you want. Before you go out there and look, it makes sense to strategize together about exactly what kind of challenge match you would most like to get. How much, at what ratio, over what period of time, for which kind of gifts, for what purpose—and why? You may not ever get it, but thinking through your *Ideal Match Deal* in advance will help you articulate your ideas better to potential match providers, avoid confusion on your task force, and *pull together* towards your goal.

Find the match challenge donor. The next task is to seek and secure your challenge grant. With the potential *Sources* (listed earlier) in mind, brainstorm with your task force about who might be persuaded to offer a match. As you consider potential individuals, families, businesses, foundations or government that might become match donors, remember to:

- **Look locally.** Think about who you have right where you live and work. Sometimes people with wealth are hidden, so you may want to let the community know you are looking, to see if a volunteer surfaces. Keep in mind that some donors who do this (even businesses or foundations, sometimes) may want to remain anonymous. People need to know that you will keep their confidences if they want to keep things quiet.

- **Look regionally and nationally.** Do a little research about who is out there. What regional foundations are in your place or your state? What wealthy families or businesses used to live here that you might approach to give back to the place where they built their lives or companies? You might even identify a local, regional or national foundation offering a challenge grant for which you can compete.
- **Look inside.** If you are drawing a blank, figure out how to use the assets you already have to create your own match. Review your organization's current goals and internal capacity. Are your discretionary dollars sufficient to construct a match? Perhaps you can use your grantmaking funds as a match: For example, offer larger program grants to organizations if they raise a match that goes into their agency's endowment fund that is a component of your community foundation or fund. Can you go to your board or a select set of current donors and create a *Community Match Fund* by pooling pledges they are willing to make over the next two years? There are many ways to gin up your match!

Construct the Match Deal. Once you have found the donor, set the terms of the *Match Deal* as detailed earlier: time frame, ratio, type of donation, and other requirements. Keep in mind the *Ideal Match Deal* that your task force imagined, and see if you can negotiate your challenge donor(s) closer to it. Remember: If you don't ask, it will never happen. And if you do ask, likely the worst they will do is say "no" to your suggested change—not to the match overall. (*See page 8: Step right up: What's your Match Deal?*)

Detail your Meet the Match campaign plan. Now your task force can get to the nitty-gritty of meeting the match. This includes at least the following:

- **Determine your donor and donation targets.** Based on the match deal that emerges, figure out what kind of donors and donations are most important to get if you are to meet your match. Your list might include more than one kind of target. For example, if you want to encourage giving from both large and small givers, you might set these targets: We want to raise \$50,000 of our \$100,000 match in bequests from five donors, and we want to raise \$50,000 in a variety of cash donations from 200 new donors.
- **Figure out the best way to reach your targeted donors.** Who should talk with whom to ask for donations to meet the match? Or what kind of activity or

event can we sponsor to encourage contributions? In the above example, you might determine that board members who already have made bequests might do one-on-one meetings with other potential bequest donors in town to find the five bequests, while you might hold some community fundraisers or send some direct mail letters to get the smaller cash donations from the 200 new donors.

- **Craft your campaign pitch or messages—and the materials to go with them.** Develop a campaign pitch or set of messages that will get to your targeted donors. Tailor them to suit the donor visits or fundraising activities you are planning. Don't forget to appeal to the self-interest and heart of your potential donor—and use the match as a hook. For example: *We have a match available! So give **now** to give **more** to your hometown!*

- **Let everyone know what you are doing—and how you are doing.**

Don't keep your match challenge a secret! Let everyone know what you are doing and the progress you are making *as it happens*. Create excitement by announcing the campaign on bulletin boards, in free “shoppers” fliers, in local newspapers and organization newsletters, on local radio and TV shows, at civic clubs and other community meetings. Provide news releases. Write letters to the editor. Every so often, report your success to date, and hold a come-one-come-all celebration whenever you achieve significant milestones. It will only help build the community spirit and momentum!

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- **Set goals, responsibilities and timelines—and track and adjust them.**

Create a timeline from now until the match period expires, complete with midpoint goals, and scheduled meetings to review your progress and adjust your plan. List the tasks to be accomplished in just the next few weeks, and who is responsible. Then, when you next meet, report what has worked, what hasn't, figure out what to do next—and list the tasks to be accomplished in just the next few weeks. Repeat as needed!

Keep scanning your capacity, recruiting, and don't give up. As you proceed, do keep your eye on your internal capacity to manage all this. For example, during a match campaign, you may receive dozens or hundreds more donations than you typically process. Make sure that you set up a system to process all these small checks, send thank-you acknowledgements, keep any records required for legal purposes—all in a timely manner.

Your energy may sag if you have a rough few weeks or months due to too much or not enough activity, but don't give up. Instead, *ask for more help!* Identify more local leaders with talent and experience in fundraising or organizing big projects or events, and enlist their assistance. Local high school teachers and classes, universities or community colleges, and local businesses all might lend time and talent to your efforts. (Imagine if you had local students writing the “thank you” letters on behalf of your community foundation or fund as part of a community service project!) Remember: The more people who participate in the campaign either as volunteers or donors, the more who feel “ownership” of the endowment. This is what you want for a community fund!

When you meet the match, Celebrate Big Time. Your fund is a success! The challenge donor is a model citizen, as is everyone who helped meet the match! Your community wins! Let everyone know. Claim a noisy and visible victory and move onto your next big thing.

The usual—and unusual—suspects

The suspects who might help you meet the match will vary depending on the challenge grant and its purpose.

- **Individuals with high net worth.** Existing donors may welcome the opportunity to form an even closer relationship with the foundation, and see their next hefty contribution be matched by your challenge donor. Wealthy people who have been on the fence about giving to your community fund, or about when to give, might just jump off that fence to your side today if you can offer the incentive of matching their donation.

<h3>Obstacles & challenges</h3>	<h3>Eliminating the fear factor</h3>
<p>We won't ever find a source for a challenge grant in our rural area. We're too new. Or no one understands what we do. Or no one will ever give us an amount that's big enough.</p>	<p>Launch your own challenge program. We said it before, we'll say it again: Create your own match. If you have exhausted your efforts to find a donor from inside or outside the community, then look inside your foundation or fund. Ask for some multi-year pledges from your board and your existing donors and pool them into a community match challenge. Ask someone who was going to give you an unfettered contribution to make it a match. Have the school children create a small fund with their pennies, and then go out to ask for it to be matched. From such small acorns, large endowments can grow!</p>
<p>We're worried about working with a private foundation that has offered us a really large match. Will there be too many strings attached? What about if we can't do it?</p>	<p>Check it out first. It's okay to say "No." Before accepting a large challenge from a foundation, review the donor foundation's mission, requirements, goals and history. Ask other organizations about their experience with the donor foundation. Some partnerships with national or regional foundations provide tremendous value for community funds and foundations. In other cases, the relationship requires complex reporting and rigid timelines—which can be difficult if you are not ready. Enter into such partnerships very seriously. People have said "No" to match challenges they thought they could not handle—sometimes it is the best decision. But if you can... <i>stretch!</i></p>
<p>We're intimidated by the idea of creating and running a campaign.</p>	<p>Learn from others. Check out the Internet, your local library and other community organizations that have run successful challenge-grant campaigns. Ask for their plan outlines and marketing materials. Get help from local marketing directors or advertising departments. Find the folks who have run a church's capital campaign. If they can do this, you can!</p>
<p>The challenge is so big, and we are so small.</p>	<p>Don't give up. Keep on asking. Get crafty. Keep the fire lit. Take turns coming up with the "Match Idea of the Month." And always remember Margaret Mead's advice: <i>"Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it's the only thing that ever has."</i></p>

- **Individuals with an interest or stake in the grant's purpose.** If your challenge donor is restricting the endowment to a specific issue or purpose, people in your community who care about that issue are likely donor candidates. For example, the board and staff members of organizations that help families in economic crisis—as well as the people those organizations have helped over rough patches—may be eager to contribute to a local endowment if they know it will enable local nonprofits to help more families in the future. Or they might want to contribute to the match by starting their own organization endowment—and getting a match in the process.
- **General public.** Matching-grant campaigns can attract everyone in the community. Why? Because they feel like they are part of a community effort. And when you are meeting a significant match, every dollar helps. Try nifty new ways to get lots of small dollars from everyone. Can you convince the local powers-that-be to add an extra 50 cents onto every ticket for the County Fair or the high school football games that will go to the endowment match?
- **Community alumni and extended family.** A challenge campaign gives you a good reason to reach out to people who have moved away, but who come back or still care. It gives them the opportunity to participate in a hometown effort and give back to the place and people that raised them. Sometimes even your friends and family who have never lived here—but who care about you—will give if you ask. And don't forget folks who pass through on vacation...everyone deserves the chance to be asked.
- **Locally owned,** absentee and stakeholder businesses. Most businesses are good corporate citizens and will be willing to take part. And competition can be a good thing: Challenges might provide the opportunity for companies in the same business to try to outshine each other.

Types of gifts, payoff, payoff horizon

Match challenges generally produce:

- **Small and large gifts from individuals and businesses** with a specific interest in the purpose of the challenge grant

- **Corporate, private or family foundation gifts** (for the challenge grants)
- **Organization endowments** (when the match is targeted to nonprofit organizations that start or build endowments with your community foundation)

The payoffs for this tactic are many, and are usually immediate or short-term, depending on the length of the challenge period. In a small community, a challenge can raise a lot of small gifts from new donors, resulting in a lot of new friends and visible progress in your efforts to build the community endowment. Each new friend now is a partial “owner” of your fund, which means they may care enough to give again. In short, challenge matches may spark the beginning of many beautiful longer-term relationships!

RFD Tool Box

All the resources that follow relate to seeking and meeting challenge matches to grow endowment. The websites listed are active links to the materials that are available online. Where materials are not available online, use the email links provided.

Resources for the field. Key organizations and resources that provide critical tools and information to the entire philanthropy field.

1. The Kresge Foundation Partnership to Raise Community Capital

Details: This generous five-year grant program has helped develop permanent endowment assets for community foundations and nonprofit organizations. The Partnership is a one-time grant program, not likely to be repeated, so there is no current opportunity to apply. But Kresge meant to provide its program as a model for other funders and community stakeholders to consider as they develop programs to strengthen their own regions. You can visit this website to find a good explanation about why endowment is important to build—it might be persuasive to someone you are trying to recruit as your challenge match donor.

Online: www.kresge.org/content/displaycontent.aspx?CID=31

Contact: The Kresge Foundation, 248-643-9630, www.kresge.org

2. GIFT: Giving Indiana Funds for Tomorrow

Details: For more than a decade, the Lilly Endowment has sponsored an intensive program—including an endowment match challenge component—that has helped local leaders build a community foundation or affiliate fund in every one of the state's 92 counties. These websites will provide both rationale and data that you might share with your potential challenge donors about what a difference their match could make. **Note:** There are portions of these websites that only members or GIFT participants can access.

Online: [Lilly Endowment Inc./Community Development/GIFT](http://LillyEndowmentInc./CommunityDevelopment/GIFT), www.lillyendowment.org/cd_gift.html; [Indiana Grantmakers Alliance](http://IndianaGrantmakersAlliance), www.indianagrntmakers.org/Members/community.cfm

3. Endow Iowa

Details: This Iowa Department of Development (IDED) website details the design of the state's challenge match to build rural community endowments. It links you to materials and resources, including the actual legislation.

Online: www.iowalifechanging.com/endowiowa/index.html

Contact: Iowa Department of Economic Development. See website above to be routed to various components—and contacts—for this effort.

4. The Foundation Center

Details: If you are looking for local, regional or national foundations that might offer match challenges, The Foundation Center is a good first stop. You must subscribe to use their most powerful online search services, but you can also access all the information for free at Foundation Center *Cooperating Collections* located in libraries, community foundations, and other nonprofit resource centers across the country. *Cooperating Collections* provide a core collection of Foundation Center publications and a variety of supplementary materials and services in areas useful to grantseekers.

Online: The Foundation Center, www.fdncenter.org
Cooperating Collections by state: www.fdncenter.org/collections

Contact: The Foundation Center, 212-620-4230 or 800-424-9836

Helpful examples from your peers.

Leading or representative examples of good practice by colleague community foundations.

1. Creighton Community Foundation Endowment Challenge Packet

Details: Here are a variety of materials used by Creighton Community Foundation—a rural community affiliate fund of the Nebraska Community Foundation—to meet a \$50,000 challenge that was provided by the second generation of a family that owns a rural telecommunications firm in their region. The materials include a description of the challenge, a case statement, a projection showing how meeting the challenge will grow into significant endowment and grantmaking over time, a script for donor visitations, a pledge card, and a “pyramid” of donations the foundation is targeting and tracking.

Contact: Nebraska Community Foundation, 402-323-7330, www.nebcommfound.org.
www.aspenccsg.org/rdp/_documents/tactics/creighton.pdf

Helpful samples and templates.

Generic templates or additional explanations that may help you.

1. **How to Design a Simple Brochure**

www.aspenccsg.org/rdp/_documents/tactics/simple_brochure.pdf

2. **How to Write a News Release**

www.aspenccsg.org/rdp/_documents/tactics/news_release.pdf

About the publication

Leading Tactics for Rural Fund Development

Raising endowed assets in a rural setting can be very *different* from asset development in urban or metropolitan areas. *Leading Tactics for Rural Fund Development* was written specifically for rural leaders who want to raise endowments in and for their community.

This *Tactic* is one in a series developed specifically to make the job of the rural fund developer easier. The *Leading Tactics* were compiled from on-the-ground experience with rural endowment builders by the Aspen Institute Community Strategies Group with significant assistance from the Southern Rural Development Initiative. Most *Tactics* were then vetted and improved by a dozen rural community fund developers at a Knowledge Lab in early 2005. The Lab was sponsored by New Ventures in Philanthropy, a national initiative of the Forum of Regional Associations of Grantmakers, which also provided follow-up support to help complete the *Tactics*.



Please go to any of our websites to find more than a dozen other *Tactics* in this series in the following four focus categories:

- *Focus A:* Understanding and Leveraging Endowment In and For Your Community
- *Focus B:* Working with Individual Donors
- *Focus C:* Engaging the Entire Community in Building Community Assets
- *Focus D:* Targeting Community Endowment for Community Outcomes

