

The Philanthropy Index

for Small Towns and Rural Areas
of the South



How to Measure
Your Community's Potential
to Build a Charitable Fund

Guidebook

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Please note: If your Philanthropy Index *Guidebook* does not include a data order form, or if you would like additional copies, please call Alan McGregor, Southern Philanthropy Consortium, (828) 285-9230, amcgregor@srdi.org. You also may download the order form from our web site: www.philanthropyindex.org.

Introduction

We Americans have a great tradition of helping each other. During the early days of our country, we came together to raise barns and build places of worship. We helped each other to harvest our crops, and we organized institutions and mutual aid societies to help our neighbors in need. Today we continue to share our talents for the good of our communities.

We lead youth groups and coach athletic teams. We join volunteer fire companies and serve on the boards of community development corporations. We deliver meals to shut-ins and work in hospitals. We give millions of hours of our time to thousands of organizations that exist to improve the quality of our lives.

We also have a tradition of financial generosity — writing checks and making cash contributions to our religious congregations, to health agencies, to colleges and schools, to community chests and to other helping organizations. Americans are quick to send money to the victims of disasters and family crises whom we read about in our newspapers or learn about on television.

A well known story in the New Testament of the Bible describes the miracle of Jesus feeding five thousand hungry

people. No one understands exactly what happened that day, but we do know that it all began when a small boy announced his willingness to share his meal of five small loaves of bread and two fish. When the members of a community come together and pool their resources, as Americans have done throughout their history, all kinds of miracles are possible.

Because we believe that almost all small towns and rural areas have traditions of charitable and voluntary behavior, we have designed a process and a product, **The Philanthropy Index**, to help them build upon those strengths. We have designed this *Guidebook* and a companion *Workbook* to help community leaders produce another kind of miracle: the raising and pooling of permanent assets that can then be invested and used for the benefit of everyone.

Building Permanent Charitable Assets: The Big Picture

One of the unique features of American society is the existence of what we call the nonprofit sector. Most of that sector is made up of the charitable organizations that utilize private and public contributions to respond to important needs like education, health, human services, culture, recreation and community development.

The other portion of the sector includes grantmaking foundations. These institutions exist to distribute the income from their prudently invested permanent assets to the other organizations in the nonprofit sector. Both are partners in the building of strong communities.

We refer to the process of establishing foundations that then make grants to nonprofit organizations as “philanthropy.” The literal translation of the word is “the love of humankind,” but, for our purposes, it refers to the intentional and organized way in which people in a community go beyond simply giving from their income and also transfer a portion of their assets into charitable funds that can serve all their fellow citizens.

Over the years many Americans with discretionary resources have expressed their generosity by using those assets to create grantmaking foundations. Either through bequests or contributions made while they are still alive, they have established permanent funds from which the income is used to support worthy institutions and causes.

As of 2000, there were more than 57,000 foundations in the United States. More than 8,000 of these are in the South. They include multi-billion dollar organizations initially funded by people with enormous wealth, as

well as smaller family foundations. Businesses also have established corporate foundations, and in many communities around the United States, individuals who do not have the personal resources to establish private foundations have pooled their assets to establish community foundations.

Together, all of these foundations demonstrate that many people express their charitable impulse not only by making annual gifts to churches and other nonprofit organizations. They also choose to transfer a portion of their discretionary assets (resources beyond the ones they need to care for themselves and their families) into permanent philanthropic funds. They do so for many reasons: because they want their generosity to continue after they die; because they want to give something back to the communities in which they prospered; because they want to ensure that future generations will be able to draw upon the income from those foundations to preserve the quality of life that they have enjoyed.

Our government recognizes that these foundations are remarkable forces for the common good. Therefore, Congress has established tax incentives that encourage citizens to use a portion of their assets for the building of these permanent charitable endowments.

Permanent Charitable Assets for Small Towns and Rural Areas

It is no surprise that most American grantmaking foundations are located in cities and large towns. As the map on the next page illustrates, much of our country's wealth tends to concentrate in these centers.

People tend to give where they live and work, and they take advantage of the management and advisory services from banks and attorneys that help them with their giving.

Can the citizens of small towns and rural areas also establish charitable foundations? We think they can, because we have discovered that virtually every community — no matter what its size — has assets of leadership, of volunteer traditions, of charitable behavior and, even of real financial wealth.

It's true that some rural and small-population counties and communities don't ever seem to have had good economic times, but we are not ready to write them off. Even in those areas that may statistically be labeled as "poor," some individuals have significant resources (see table at right). Indeed, our research makes it clear that the so-called rural South now is actually home to a surprisingly large number of high-income earners and even millionaires. Perhaps even more important, though, is the fact that a growing number of people who may not have evident wealth still have an increased amount of disposable income and assets. Among these citizens are farmers and businesspeople who have accumulated assets, as well as others who have inherited large estates. Many rural areas now are also home to retired people who have moved to the "country" and brought with them their accumulated assets.

Furthermore, those figures may be just the tip of the iceberg. Financial wealth consists of more than just bank deposits or stock ownership in public companies. Assets in rural areas often include land, timber, mineral rights, farm equipment and other property. The challenge for anyone

interested in building a community's charitable assets is to identify these resources and to harness them for the common good. By pooling gifts from many citizens — not just the very wealthy — community foundations around the country have built up significant charitable assets. Indeed, during the past few decades, the world of philanthropy — once dominated by a relatively small number of super-wealthy and generous givers — has become a place in which donors of much more modest means can express their charitable impulses to help their neighbors.

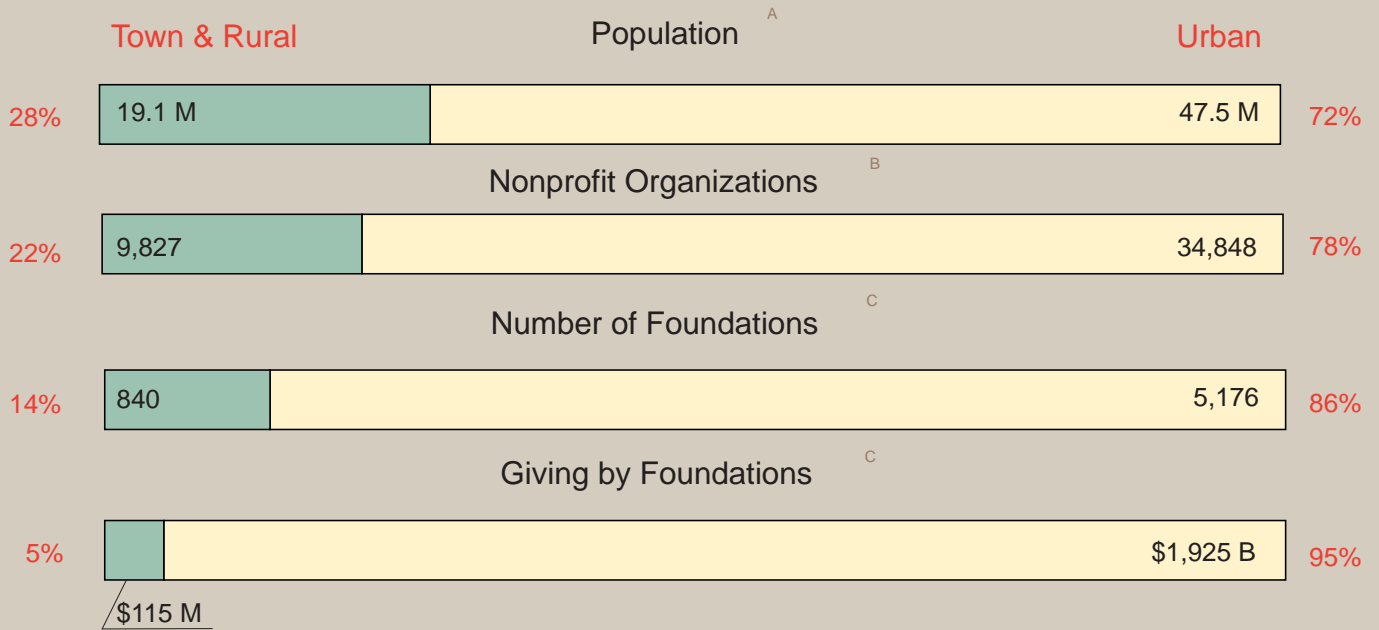
Our assumption is that all communities often have more assets than they may realize. The materials that we have created 1) describe the importance of building permanent charitable resources; 2) explain several ways to identify and measure philanthropic potential in a community; and 3) suggest steps that community leaders can take to harness local assets and put them to work for everyone.

High Income (\$150,000+) Households

	Total Counties	Rural Counties	Total High-Income Households in Rural Counties
Alabama	67	46	13,400
Arkansas	75	64	14,081
Florida	67	33	18,159
Georgia	159	117	32,278
Kentucky	120	98	22,503
Louisiana	64	40	10,864
Mississippi	82	75	18,039
North Carolina	100	65	33,878
South Carolina	46	30	15,918
Tennessee	95	69	21,195
Virginia	98	59	20,212
West Virginia	55	43	10,606

Philanthropic Capacity in the South

The philanthropic strength of Town & Rural areas in the South falls well below that of the region's urban areas.

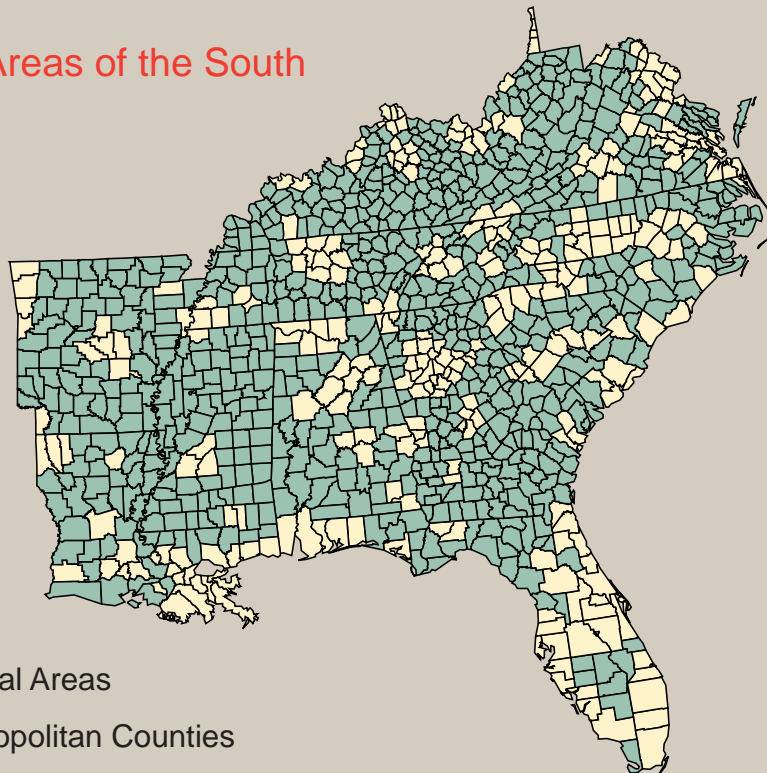


^A 1998 Population Estimate, Census Bureau

^B 1999 501 (C) (3) Organizations filing 990s, National Center for Charitable Statistics

^C Southeastern Foundations II, Foundation Center, 1999

Town & Rural Areas of the South



Countries /
Parishes

Town & Rural Areas

Urban Metropolitan Counties

The Philanthropy Index: An Overview

We believe that giving has a transformational effect on both givers and recipients.

We believe that all communities have assets (including financial resources) that can be harnessed for the benefit of everyone.

We believe that using those resources to build philanthropic institutions like community funds can play a critical role in the building of healthy, caring and just communities.

You are reading this *Guidebook* because you care deeply about your community. The chances are strong that you'd also like to play a part in building permanent assets that can be used to improve the quality of life where you and your fellow citizens live. We're also guessing that you're probably someone who likes to take on challenges and get results.

That entrepreneurial and visionary spirit will be essential. Some of your friends and neighbors are going to be skeptical about the chances of success. As we have already suggested, the kind of assets you're looking for may not be immediately visible. It may be difficult to convince other people that your community's private and individual resources can be brought together for charitable purposes and achieve significant results.

However, if you're still willing to accept the challenge, we would like to help you. We have designed a process by which your community can create its own Philanthropy Index — a kind of “report card” on your potential to tap into local assets and convert them into charitable resources. It is our strong sense that a community that creates this Index will be able to see itself from a new perspective and be energized to begin the process of building those assets.

Stages of the Philanthropy Index Process

- Stage 1: Order the *Data Report* and *Workbook* for your community.**
- Stage 2: Build and Bond the Leadership Team**
- Stage 3: Inventory Your Community's Assets**
- Stage 4: Educate and Decide**
- Stage 5: Deepen and Define the Mission**
- Stage 6: Study the Options**
- Stage 7: Establish an Organization**

We can't offer any guarantees, but we believe this process can set in motion a community-wide effort that will yield positive results. Building community philanthropy also offers a unique opportunity to build a new leadership group or strengthen a leadership group that is dedicated to positive change. As you go through the process, remember that the end goal is to create new opportunity and solve old problems. This takes more than money — it takes new relationships and a team to bridge the fault lines that may have divided communities in the past.

What is the Philanthropy Index?

Put most simply, the Index is a collection of both objective and subjective information about your community that measures your potential to create philanthropic assets. It includes “hard” data from the U.S. Census Bureau and other sources that we will provide for you, as well as information that you will have to collect yourself.

What kind of information will the Southern Philanthropy Consortium provide?

We have tried to keep the process of building a local Philanthropy Index as user-friendly as possible. Therefore, although there are many ways to measure philanthropic potential, the current version of the Index calls for the use of only 12 “indicators” — sets of information primarily from public domain databases that we believe will provide you with highly useful insights about your community and upon which you can build by answering the “Local Knowledge Questions.”

When you order the information that we can provide for you (as well as the *Workbook* to assist you in evaluating it), you will receive three sets of data:

Baseline Data. The first set of data that we will provide for you includes information about four indicators of philanthropic potential in your community: a) grantmaking foundations, b) nonprofit organizations, c) individual charitable giving and d) “social capital” (another way of describing the ways in which people connect with each other to accomplish positive things for their communities). Chances are strong that the presence of some combination of these four indicators means that your community has the potential to increase its philanthropic resources.

Trend Data. We also will provide you with a set of four important indicators that describe changes in your community during recent years. They include information about a) population change; b) emerging

and dominant economic sectors in your community; c) labor force stability; and d) increases in retirees and individual income that are not related to employment earnings.

Target Information. The third set of information includes four indicators that will identify the presence of individuals (not by name) who have the capability to play a key role in the building of permanent philanthropic resources for your community: a) business proprietors; b) farm proprietors; c) affluent and middle-class families; and d) high-income households.

12 Indicators About Your Community Available from the Southern Philanthropy Consortium

Baseline Information

- Grantmaking foundations
- Nonprofit organizations
- Individual charitable giving
- “Social capital”

Trend Information

- Population change
- Emerging/dominant economic sectors
- Labor force stability
- Retirement and investment income

Target Information (not by name)

- Business proprietors
- Farm proprietors
- Affluent and middle-class families
- High-income households

What kind of information will you have to gather?

As noted, the *Workbook* also contains a series of other questions, the answers to which will help you to explore more deeply the information described by the 12 indicators listed above. You will need to compile information about community leadership, nonprofit organizations, patterns of generosity by individuals and businesses to your community's major religious congregations and other institutions, charitable assets (in addition to the information about foundations that we will provide), examples of voluntary service by your community's citizens, and, finally, evidence of your community's “can-do” spirit.

Community Indicators of Philanthropic Potential

Presence and broad distribution of leadership

Patterns of giving

Existing charitable assets

Community voluntarism

Visionary spirit

What makes this information different from other studies?

Many studies and reports about small towns and rural communities do a good job of describing their needs. These kinds of problem-focused statistics and evaluations can focus attention upon the importance of correcting a bad situation. However, because they tend to dwell upon deficits in the community (e.g., high unemployment, low educational achievement, inadequate health coverage) and often are compiled by people who are not members of the community, the result over time can lead a community to develop a negative self-image and sense of hopelessness.

The Philanthropy Index that you compile will be a report from people who live and work in your community, and its emphasis will be upon identifying local assets that have the potential to strengthen the quality of life for everyone. The actual process of collecting the data for the Index can be a community-building process, and the results can provide the collective energy needed to bring about positive change.

How will the Index help your community?

Because the Index will give you documented information (not just hearsay) about individual and business assets as well as positive dynamics in your community that are seldom reported, it should offer you a new appreciation for the possibility of building philanthropic resources. Some of the information you gather will be common knowledge, but much of it will be new.

The information that you collect will be important because you will be able to adjust your Index score based on local knowledge. The data we provide is to supplement, not to replace, your local knowledge and intuition.

We further think you will discover that the process of gathering, discussing and evaluating the information that will form your Index can be a powerful tool for building a sense of community.

Creating a pool of charitable capital from which to make grants in your community will not happen overnight. You should have both a short-term and a long-term vision for building your fund. Most communities will be able to get into the business of grantmaking after a two- or three-year process of fundraising and organization.

Your initial grantmaking ability may seem to be only a small start when measured against the eventual opportunities for community investment. However, our experience shows that once a fund is created, it tends to grow exponentially. The compounding nature of asset investment will help — and if the fund develops the trust of the community, large gifts are likely from planned giving and bequests. “Legacy” gifts like these all too often are made to organizations outside of rural communities because donors are not aware of the home-town opportunities for giving. In one of the communities where we field-tested the Index, a member of the leadership team told us the story of a friend who left several millions of dollars to the state university. “If we would have had a community fund, he would have left the money at home.” We would like to help you keep *your* community’s charitable funds at home.

Why should you consider compiling the Index now?

The American economy periodically takes a hit (as it did during 2000-2002), but its expansion during the 1990s led to the creation of more wealth than ever before in our nation’s history. Some people have become enormously wealthy as a result, but, equally important, a lot of other people with more modest means now have more disposable assets. The existence of these resources in virtually every community — when coupled with the traditions of American optimism and voluntarism — suggest that it is a very appropriate time to begin the work of building permanent charitable funds in virtually every community.

Building Your Community's Philanthropy Index

Stages 1-4: Leadership, Data and Decision-Making

If you share our feeling that your community has the potential to begin the process of building permanent charitable assets to benefit everyone, we would recommend that you follow the process outlined in these stages:

Stage 1: Order the *Data Report and Workbook for your community*

Because the building of the Philanthropy Index will require you to request “hard” data, and because that data is collected according to particular geographical units, you will need to be clear about the way in which you define your community's boundaries.

Using a map that identifies counties (or parishes) and most of the incorporated towns in your area, spend some time reviewing the geography for which you propose to build a Philanthropy Index. In most cases, you probably will simply ask for information about a single county or parish or several that are tied to each other by economic or other conditions. However, it also is possible that you will want information about a smaller unit like a particular town. Yet another possibility is a combination of municipalities that are very close to each other (sometimes on different sides of a state line) and between which people travel frequently to shop, work or socialize. Then fill out the order form that accompanies this *Guidebook*.

The Southern Philanthropy Consortium will provide you with a *Philanthropy Potential Data Report* that includes data about 12 indicators for the area you have identified.

Stage 2: Build and bond the leadership team

A great deal of your eventual success will depend on your ability to recruit a group of leaders who represent the full economic and racial/ethnic make-up of your community. As you go about this process, here are some suggestions:

Think inclusively. By all means include obvious and visible leaders like the chief executive officer of the local bank, the president of Rotary or Ruritan, the school superintendent or the county manager. However, also invite people like influential religious leaders, the head of the local community development corporation, and the director of a significant human services agency.

Establish an appropriate size. It's difficult to be properly inclusive if your leadership team has only five members, but the work may become too cumbersome if you have 25 members. A team of 15 – 20 members is usually a good size.

Promote a visionary tone. As you go about recruiting your leadership team, look for people with a “can do” spirit — the kind of fellow citizens who are willing to dream as well as to work to make dreams come true. They won't be hard to find; you've seen them give leadership to other projects that led to positive changes in your community. The work of building your team can also be a great way to involve promising new leaders. Consider inviting young people. They often add special energy, and this can be a great way for them to learn about their community. Of course you will want at least some of your team members to have a practical bent and a critically analytical way of approaching a job, but you don't need people who spend most of their time telling you why things can't be done.

Bond the team. Even if everybody on the team seems to like the idea of looking for ways to create new philanthropic capital for your community, take the time (and it

will take some time) on the front end of your work for the members to get to know and begin trusting each other. Schedule a social evening, and encourage the team members to talk about their children and families, their hobbies, what they do when they're on vacation and the ideals that are important to them. Once they've started having those kinds of conversations, it will be much easier for all of you to take the discussion to the next level — your shared dreams for your community. Because you will know each other better as individuals, it also will be easier to talk honestly about historic divisions in the community and other potential barriers to the success of your project.

The first meeting of the group is important. Consider how this meeting will set the tone for the group. You may want the first meeting to be at the home of a leader who has trust throughout the community. Or, perhaps a more business-like meeting held in a meeting hall or conference room will be more suitable. Consider carefully who should invite people to come. Generally, those calling the team together should reflect the diversity you plan for the group as a whole.

Stage 3: Inventory your community's assets

Take the time to understand your data score. The *Data Report* you will receive will be accompanied by a *Workbook* that describes the information in greater detail. The entire team should review and discuss this material, keeping in mind that even if the figures paint a less-than-positive picture of your community, they don't tell the whole story. For example, they can't measure the spirit and heart of a community and its leaders. Once your leadership team has reviewed and discussed your data, transfer the scores for each of the 12 indicators included in the *Data Report* onto the score sheet included in the *Workbook*.

Develop your "Local Knowledge" score. Your *Workbook* will also include a series of questions associated with each of the 12 social and economic indicators, that will help you to flesh out the objective data you received from us. The *Workbook* describes the kind of information you will need to consider and provides you with a scoring system to measure your results. You may also come up with some other indicators of your own about which you will want to collect information.

Your group may decide to answer the Local Knowledge Questions based on "gut" feelings — or you may decide to research these questions within your community to develop more accurate answers. If you decide to do your own research, it will be important for every member of the leadership team to have an assignment (and a deadline) for the collection of the information needed. However, since your team's members are busy people, you may also want to explore the use of other volunteers — perhaps a club of retired persons or a professor and students from a local community college.

Finally, before anyone goes into the community and begins asking questions, it will be important for the group to discuss how to conduct this kind of research in a discreet and sensitive fashion. Since many of the questions relate to money, the people being interviewed will need to understand fully the purpose of the study and the way in which information will and will not be used. What you are doing has the potential to be of great help to the community, but the search for information also has to respect personal privacy.

Once you have answered the "Local Knowledge Questions" in the *Workbook*, adjust your score based on your community research and local knowledge.

Stage 4: Educate and Decide

After you have scored your Philanthropy Index, your leadership team will have to ask itself the key question: Does it make sense to proceed with the work of building a charitable fund of assets that can be a resource for the entire community? It is a decision that only you as leaders of your community can make.

Your team may want to talk with key members of the community before making this decision. You may also want to undertake more research on the Local Knowledge questions.

Remember that you are not deciding what kind of organization you need for your charitable fund. Nor are you setting fundraising goals, or deciding what projects need funding. At this point you are simply deciding whether to go forward and establish an organization.

Using What You Have Learned to Build Permanent Charitable Assets for Your Community

Stages 5-7: Mission, Options and Organization

We hope that the research process and your Index score encourage you to continue with the process of developing the philanthropic resources of your community. The stages outlined here will guide your team as it establishes an organization to build permanent charitable assets.

Stage 5: Deepen and Define the Mission

The Mission Statement. Your next step is to work on your vision of what philanthropy can achieve in your community. The Mission Statement for your new organization should be a single paragraph that captures your group's vision for the community. It should also make clear the role your community fund will play in making that vision into a reality. Developing your Mission Statement can be one of the most exciting things your group will do.

A good Mission Statement is concise. It should be bold and optimistic. It should challenge the community to find the best in itself. Many versions and revisions may be necessary before your group is ready to formally adopt the statement. It's worth taking the time to do this job well. These words will introduce your group's work and intentions to your community.

Informing the community. Next you will want to share the results of your research and your Mission Statement with the rest of the community. Ask the local newspaper or radio station to carry a story about what you've been doing. This story might include: an explanation of why your team assembled and the importance of philanthropy to all communities; a description of the team's membership and quotes from some of the leaders about why the project is important; a summary of the research and its implications; and an outline of proposed next steps. (The *Workbook* includes further suggestions about how to develop this story.)

Stage 6: Study the Options

You will now need to consider how you want to structure the management of the assets that you bring together. Many options for this are available. You will want to study them carefully. People will want to be sure that their contributions to this philanthropic fund will be well managed.

Perhaps the simplest approach at the outset would be to establish contact with a community foundation that serves or is willing to serve your area. Some are local, some statewide and some regional (see "Building Permanent Charitable Resources — The Big Picture" earlier in this Guidebook). Upon request, the Southern Philanthropy Consortium will provide a list of community foundations in your area. Many community foundations are pleased to assist small communities with the establishment of local or "affiliate" funds. They can provide important technical assistance with asset building, grant-making and investment management. Because they already are well-established, working with one of them will free you from a lot of organizational detail and give you the opportunity to focus upon your most important task — identifying and recruiting donors for your community fund.

■ You could ask a local bank or other financial institution to serve as the investment manager of the assets you raise.

- You may also create an independent public foundation by incorporating, creating bylaws and applying for IRS tax exemption as a 501(c)(3) public charity. This option involves a much higher level of administrative and legal burden than working with existing community foundations or financial institutions.
- You may have determined that the timing is not right for raising permanent charitable assets. Instead of establishing a fund for the community, you could set up an endowment for a local nonprofit organization. You could establish a scholarship fund, or conduct an annual fund drive. “Leave a Legacy” (www.leavealegacy.org) is a national program that can provide you with ideas for this kind of community-wide fundraising effort.

Stage 7: Establish an Organization

Governance. Any permanent philanthropic organization will require a governing or advisory body to set funding guidelines and priorities, do fundraising, maintain communications, manage finances and make grants.

Work carefully as you choose the group that will govern your organization. Keep in mind the basic principles used to select your Index research team. You want this new group to reflect the complexity of your community. Economic, ethnic and gender diversity remain critical. Leaders from all sectors are important. Many active leaders will also serve on boards or staffs of community organizations that may be grantees of the new fund. Don't automatically disqualify these leaders. Sometimes they are the most qualified. Potential conflicts can usually be managed by sound conflict of interest policies.

- If you affiliate with a community foundation, your group will be accountable to the board of directors of that organization. They, in turn, will be accountable to the IRS, your donors, the public and state agencies.
- If you form an independent public foundation, your group will be directly accountable to all of the institutions and individuals listed in the previous paragraph. There are many important laws and regulations governing the activities of charitable organizations. Conformity with these rules is important for maintaining the tax-exempt status of your organization and the tax deductions of your donors. You should seek professional assistance from a community foundation, lawyer or accountant with knowledge of those laws and regulations.

Asset Development. You now will want to begin the process of encouraging individuals and organizations to make contributions to this pool. If that sounds like a fundraising campaign to you, you're right. It does rely on some of the same organization and techniques (for example, the need for strong leadership, the identification and cultivation of donor prospects, the use of volunteers and the development of materials to communicate what you are doing). However, building a pool of philanthropic funds is a very different process. You are not going to be asking people to write checks to help buy a new ambulance or underwrite a Little League team. Instead, you are going to be encouraging folks to transfer a portion of their assets into a charitable fund, or to make provisions for a gift from their estates. This kind of fundraising is not a sprint. It is a community-wide process that will continue far into the future.

Try to reach a consensus about what an appropriate goal for your initial fundraising might be. It is possible to envision contributions of individual and corporate assets that total in the hundreds of thousands of dollars. But it may be more reasonable in some communities to set a first goal in a smaller amount, like \$50,000 to \$100,000. Eventually, you will be able to make grants from the earnings of your permanently invested assets. For example, with a fund of \$200,000 it would be reasonable to make \$10,000 to \$12,000 in annual grants. Communities that expect the development of permanent assets to be slow may choose to raise money for annual giving, while also building their permanently endowed assets. This allows grantmaking in the early years that demonstrates the impact of the growing fund in the community.

Conclusion

We are convinced that the presence of philanthropic resources in a community can contribute enormously to the quality of life for all of its citizens. As we have said throughout this *Guidebook*, we believe that an asset-based review of local resources can help communities discover that they have the potential to build philanthropy in their own backyards. It is our hope that this *Guidebook* has interested you in exploring how your community might begin to create a pool of charitable assets and has encouraged you to take the next step and request further information, using the accompanying order form.

About the Southern Philanthropy Consortium

The Southern Philanthropy Consortium is a collaborative endeavor to increase philanthropic support for rural and other underserved communities in the South. Its partners are:

- The Southeastern Council of Foundations, a 355-member association of grantmakers in 12 Southeastern states;
- The Southern Rural Development Initiative, a 28-member collaborative of community-based development organizations that build rural development capacity and capital across the South; and
- The Mid South Collaborative to Build Philanthropy, an association of private, corporate and community foundations working to increase philanthropic assets in Arkansas, Louisiana and Mississippi. The Collaborative is administered by the Foundation for the Mid South.

Funders

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Local Data Report Order Form

Use this form to order a report on the 12 philanthropic potential indicators for your area. You may order data for your primary rural county/parish and up to three additional adjoining counties/parishes. You may also request specific data on up to three towns in your area. (Review a sample data report at www.philanthropyindex.org.)

Important: Data is currently available only for the following states in the South: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, and West Virginia.

The fee for the report is \$500. A check for this amount must be enclosed with this order form. The fee covers the costs of generating your customized data report. The fee includes one printed copy of the report and a CD Rom copy. Additional copies cost \$15. The reports are up to 24 color pages. The purchaser is free to make unlimited copies. An electronic copy may be provided via e-mail.

Name of Group: _____

Name of Contact Individual: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Telephone: (____) ____-____ Email: _____

Name of Primary Rural County/Parish: _____

Adjoining Counties/Parishes (up to 3): _____

Nearest/most important metropolitan area: _____

(Optional) Please send additional information on these towns in our area: _____

Number of additional copies (at \$15 each): _____

Email address for electronic copy of report: _____

By submitting this order form, we certify that our community is located in one of the eligible southern states and that we agree to share our final "score sheet" with the Southern Philanthropy Consortium for evaluation purposes and the development of aggregate data.

Signature: _____

Date: _____

**Please enclose a check for \$500 plus cost of additional copies.
Make the check payable to SRDI - Philanthropy Index.**

Mail to: Fax to: 828-285-9231
Philanthropy Index Clearinghouse
Southern Philanthropy Consortium
20 Battery Park Avenue, Suite 211
Asheville, NC 28801

Please provide the following information about your group:

1. What is the nature of your group?
 Ad hoc concerned citizens group
 Associated with a local nonprofit organization or civic club
 Associated with a community foundation
 Private or family foundation
 Governmental organization
 Business related organization
 Concerned individual
 Other, please describe: _____

2. If you are sponsored by an organization like those listed above, please name it: _____

3. List other organizations working with you:

4. If you are an existing fund or foundation, what are your current total assets? _____
 Annual grants? _____

5. Are you aware of a community foundation serving your area? yes no
 If so, are you in contact with them? yes no
 If so, do you plan to work with them on this project? yes no not sure

6. How would you rate your group's experience level in nonprofit management? low medium high
 In fund raising? low medium high

7. At this point, how would you rate the possibility of success in starting a permanent philanthropic fund
 for your community? low medium high

8. If a fund is created in your community, what is your prediction for its total assets in two years? \$ _____
 In five years? \$ _____ In 15 years? \$ _____

9. Would you like to consult with someone from the Southern Philanthropy Consortium as you begin
 the Philanthropy Index process? Yes No