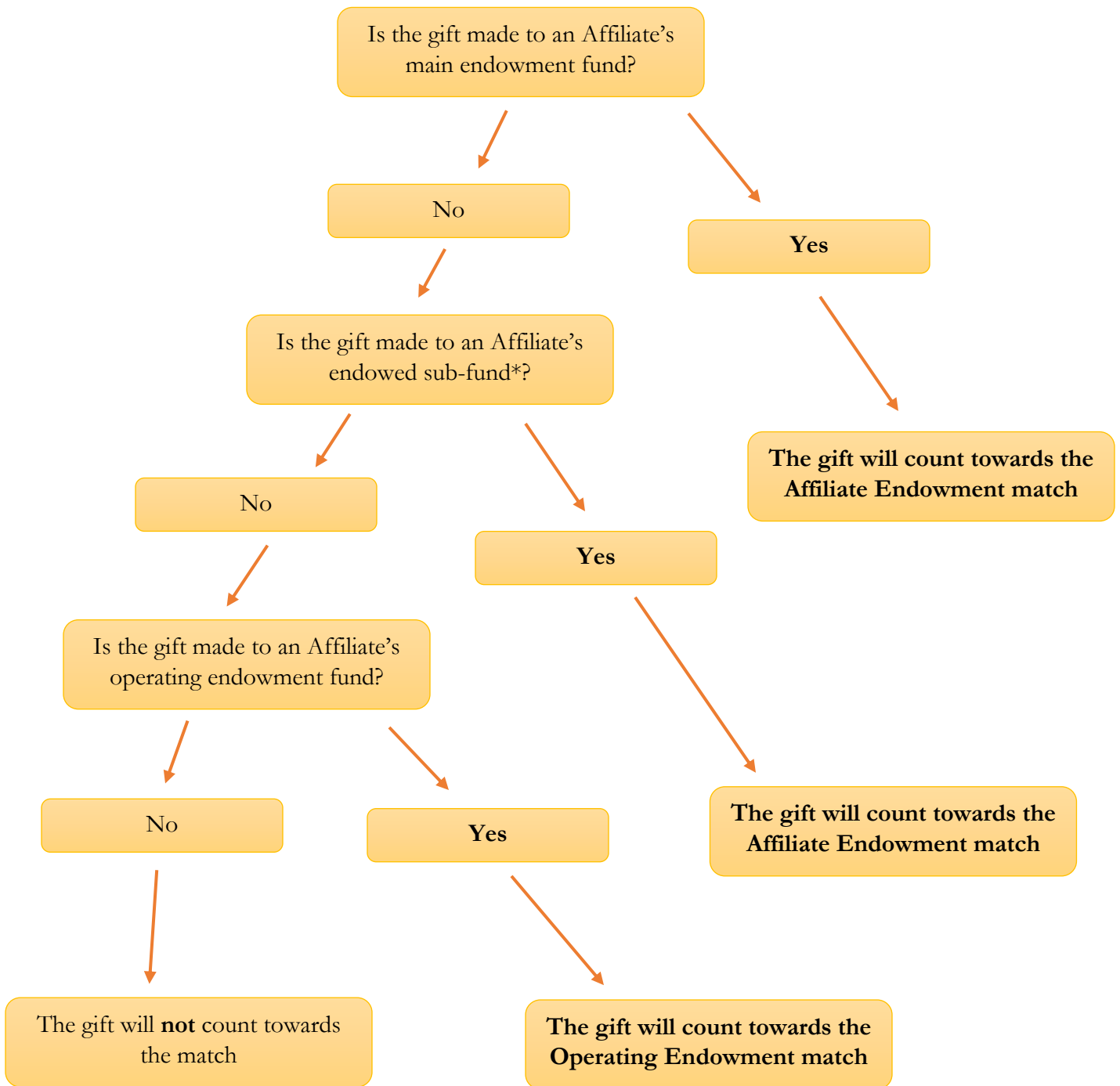


**Affiliate Program Match Incentive 2017 - 2020**



*\*Affiliate sub-funds gifts that count towards the match are gifts to endowed unrestricted and endowed field of interest funds.*

## **Affiliate Match Incentives**

The match is designed to incentivize Affiliate communities to raise additional dollars over the next 4 years to support their communities. Donors are able to double their impact when giving endowed gifts to specific Affiliate funds during the time period of 2017 – 2020.

### **Meeting Your Affiliate's Annual Fundraising Goal**

- If you raise the amount identified in your Affiliate's fundraising plan, in the current year, your Affiliate will receive the match. If you raise above the annual goal, the additional dollars will roll-over into the next year's match.
- If you raise below the amount identified in your Affiliate's fundraising plan, in the current year, your Affiliate will not receive the match for that year. Thus, it is important for each Affiliate Advisory Board to thoughtfully establish a reasonable annual fundraising goal.
- The match to your Affiliate's main endowment is a 1:1 match of up to \$100,000 over four years.
- The match will be calculated for gifts received or postmarked on or before December 31. Matching dollars will be transferred in Q1 of the following year.

### **Gifts That Count Towards the Match (2017 – 2020)**

- Any gift made to your Affiliate's main endowment fund.
- Any gift made to your Affiliate's endowed sub-funds (i.e. endowed unrestricted funds, endowed unrestricted memorial funds, or endowed field of interest funds).

### **Gifts That Do Not Count Towards the Match**

- Gifts made to any non-endowed fund, including Affiliate non-endowed funds.
- Gifts made to any scholarship fund.
- Gifts made to any agency fund.
- Gifts made to any designated fund.

### **Affiliate Operating Endowment Fund Match (2017 – 2020)**

- The match for the Operating Endowment Fund is a 1:1 match to the amount raised, up to \$15K per year.

### **Bequest Gifts to Affiliate Endowed Funds**

- Bequest gifts will be counted towards the match at 5% value of the bequest gift, capped at \$5K per bequest.

- To confirm a bequest, a Legacy Form (though not legally binding) is available if the donor is comfortable ensuring the gift. Customized Legacy Forms are available through your Affiliate's online Toolkit.

### **Bonus Match of \$25,000**

A bonus of \$25,000 is available for all Affiliates after the \$100,000 match is raised. This is a 1:1 match of up to \$25,000. Once the additional \$25,000 is raised by an Affiliate, the Affiliate Advisory Board may decide how best to utilize the unrestricted funds. For example, the funds may be used for one of the following options:

- The \$25,000 can be added to the Affiliate's main endowment fund.
- The \$25,000 can be added to any Affiliate's endowed sub-fund.
- The \$25,000 can be utilized for grantmaking.
- The \$25,000 can be added to the Affiliate's operating endowment fund.

### **Additional Grantmaking Dollars (2017 – 2020)**

- ACF and Rasmuson Foundation are providing each Affiliate community an additional \$5,000 per year to galvanize each Affiliate's grantmaking impact.
- The \$5K will be made available to each Affiliate on June 1.
- Grants can be made during annual cycle (if after June 1) or made as discretionary grants.
- The \$5K is intended to be used during the current year. Funds will need to be used by December 31<sup>st</sup> of the current year.
- The intention of spending out these additional dollars in the current year is to put additional grants into Affiliate communities as soon as possible to increase the impact of local philanthropy & create a broader awareness for the great work of Affiliates.