Link to Recorded Webinar:

http://energizingentrepreneurs.adobeconnect.com/pmeaieiiguns/
Call Agenda

• Project Background
• Moving Forward
• Helpful Models
Call Objectives

- Refresh
- Explore the Strategy
- Finalize the Strategy
Project Background
Project Timeline

• 2017 – Center completed Transfer of Wealth Opportunity Analysis for Rural Maryland
• October 20, 2017 – Strategy Development begins with a “Goal Clarification” working session
• January 19, 2018 – Strategy Options and Considerations are Explored by the Team
• February 16, 2018 – A Strategy Development working session is held with the Team
• February-April Interim – The Rural Maryland Team undertakes research and partner exploration
• April 20, 2018 – Interim work is shared in a working session and the Center commits to develop a strategy paper by mid-May for consideration by the Team
• July 24, 2018 – A final working session will be held to review and finalize the strategy
Prosperity Endgame

Keep wealth in rural Maryland.

Engage foundations in the initiative.

Engage community foundations, private foundations and non-profit.

Support enhanced estate planning.

Provide best practices.

Help rural Maryland minority farmers.

Provide gap financing.
Strategy Goal

Keeping wealth in rural Maryland so that it can be used to support community economic development work.
# Foundation Roles

<table>
<thead>
<tr>
<th>Historic or Traditional Foundation Role &amp; Mission</th>
<th>Donor Advisory Funds</th>
<th>Affinity Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support</td>
<td>Do Good Work Focus Strategic?</td>
<td></td>
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<tr>
<td>Favorite Charities</td>
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## Community Focus

<table>
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<tr>
<th>Convening Role</th>
<th>Supporting Research</th>
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<td>Non-Profit Engagement</td>
<td>Strategic Initiatives</td>
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## Strategic Grant Making

<table>
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<tr>
<th>Challenge Grants</th>
<th>Strategic Endowments</th>
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## Impact Oriented Donor Development

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<tr>
<th>Strategic Directions</th>
<th>Strategic Grant Making</th>
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## Future Funds

- **Donor Centric**
  - Targeted Grant Making like Scholarships
  - Aligning Donor Advised Funds and Targeted Grant Making with Community Priorities

- **Threat of Private & For-Profit Donor Service Firms Competition**
  - Non-Profit Endowments

- **Community Impact Centric**
  - Philanthropic Impact Investing
Rural Maryland 2017 TOW Findings

Household Net Worth

$530 billion

Transfer of Wealth

$64 billion OVER 10 YEARS

$703 billion OVER 50 YEARS
## Philanthropy Development Illustrations

<table>
<thead>
<tr>
<th>Increased Charitable Giving</th>
<th>Legacy Giving &amp; Endowment Building</th>
<th>Philanthropic Impact Investing</th>
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<tbody>
<tr>
<td>There is massive potential to increase annual charitable giving and support charitable focused capital improvement campaigns throughout rural Maryland.</td>
<td>Over the coming decade there is a $64 billion transfer of wealth opportunity available to rural Maryland. There is significant potential to grow endowments through legacy giving.</td>
<td>A rapidly growing trend in philanthropy is impact investing. For some charitable purposes investing versus grant making could result in greater impact with the same dollars.</td>
</tr>
</tbody>
</table>
Moving Forward
Getting Started

- Consortium
- MD REDPIN
Potential Models

- Minnesota
- Kansas
- Nebraska
- Iowa
- South Dakota
Questions & Discussion
Thank you!

For More Information:

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<th>Name</th>
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