

## Low-Touch to High-Touch: Rural Donor Services from Basic to Bodacious

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1. 3 Key Facts
  - a. The northwestern coast of California is relatively low in per capita income compared to other areas of the state. However, per capita volunteering is above average and so is philanthropic giving, enough for a population of 175,000 people to support more than 800 local nonprofits. Wealth is not generally displayed. Much of it is in appreciated land, which partially explains our 19 charitable remainder trusts.
  - b. Local people are adverse to “glitz.” Marketing materials that work elsewhere bomb here. Straightforwardness seems to be a local value. However, just like people everywhere, our donors do respond to high quality customized service and some of them want lots of it.
  - c. As an example, local donors prefer recognition events that are personal and individual rather than large and formal. They prefer information to recognition. For instance, donors will always say “yes” to an invitation to lunch with our E.D. However, while at lunch, they will deflect expressed appreciation and ask for information about the community and the foundation. While they will not come out for group recognition, they will respond to a personalized invitation to come learn something new or to provide service for the community at large or for the foundation itself.
2. Goal  
We don’t have an endowment-building goal. We offer planned giving as a donor service rather than as a development tool. We support professional advisors and help donors make gifts that make the biggest difference and give them the most satisfaction whether or not HAF benefits directly. “Giving it away” turns out to be a pretty good development strategy for us.
3. Tactics, Targets & Story  
The list of the high touch donor services HAF provides includes those listed in the “Tactic” handout as well as
  - Inclusion in our donor yearbook
  - Press release or press conference at fund inception
  - Holiday poinsettias delivered by Board & staff to new fund donors as well as to frail elders and those who are bereaved
  - Small group scholarship coffees for donors and their scholarship recipients
  - A quarterly donor newsletter
  - Donor education forums
  - Planned giving assistance for donors and their professional advisors
  - Home and hospital visits, phone calls and frequent handwritten correspondence, i.e. birthday, get well and sympathy cards

With the exception of reduced fees for large nonprofit funds and investment management options for all large funds, we offer all services to all donors regardless of their level of giving, responding to the needs expressed by some and initiating contacts with those from whom we haven’t heard. In addition to sending gift letters and fund statements, we average more than 120 donor contacts each month.

I've been asked to show you our Donor Yearbook. This year it's in chronological order, beginning with the story and photo of the couple that created HAF in 1972 and continuing on with descriptions of every fund ever established, including those that subsequently closed. Fund balances range from \$100 to several millions. We send 7,800 Yearbooks out at Thanksgiving and distribute another 3,000 during the course of the year. Our annual report is now a separate and much shorter document, mailed in midwinter. This Donor Yearbook moves local residents to tears because they see their friends in it, both living and deceased. It's a living memorial and it calls forth a generous response whenever it is distributed. It costs a fortune to produce and we continue to look for ways to reduce those costs without reducing the Yearbook's impact.

#### 4. Capacities

The donor services budget is approximately \$200,000, including the Donor Yearbook. Board members are committed to donor services and assist with donor recognition. There are three donor services staff and we work closely with fiscal, program, scholarship and reception staff to provide donor services as a team. We spend a great deal of time building this team, communicating information, brainstorming solutions, developing procedures, honing systems, and recording and sharing donor contacts by means of our software (FIMS).

#### 5. Outcomes, Lessons & Advice

##### Outcomes

- a. Donors are sufficiently happy with our services to tell their friends. On average, we open between two and four new funds each month.
- b. We receive about 2000 gifts a year totaling approximately \$5 million dollars. This December, we received 100 more gifts than we did last December.
- c. Our support is broad based. 20% of the \$5 million we received last year were gifts under \$25, and over 61% were gifts under \$100.

##### Lessons

- a. Don't over commit. Add services gradually, never promising more than you can deliver.
- b. High touch donor services can only happen if there is a foundation-wide committed team. Teamwork takes time.
- c. As heady as it is to be the staff member whom donors know and love, it all works better if donors know and love us all as a service organization.

##### Advice

- a. Inspire your coworkers – tell them donor stories.
- b. Share the work – build systems for your coworkers' direct involvement with donors so that they too become donor advocates.
- c. Remember the "service" in donor services. Put your donor's agenda first and be a faithful and agile servant to them.

