

I.1 Low-Touch to High-Touch: Rural Donor Services from Basic to Bodacious

Thursday, January 30 / 4:00-6:00 p.m.

Session Leader

Pat Vasbinder

Consultant; Former Vice President and COO, New Hampshire Charitable Foundation

Peer Leaders/Storytellers

Elizabeth Myrick: Senior Associate, Community Strategies Group, The Aspen Institute

Alexandra Reid: Director of Donor Services and Planned Giving, Humboldt Area Foundation

Judy Sjostedt: Executive Director, Parkersburg Area Community Foundation

Session Topic (text from Agenda)

Perhaps even more so than in urban areas, a community foundation’s rural endowment building success can sink or swim based on how deft its touch is with donors. If a regional or statewide foundation is reaching out to rural areas, its geographic distance from rural donors requires special effort to establish a close and ongoing connection. A rural-based foundation, because of its proximity to the donors, must take care in matching its donor services and recognition to the local culture – which may vary from community to community. And that’s just the start. In this session, we’ll start by hearing stories from RDP peers about how several rural-focused community foundations handle donor services from the basics to the bodacious – with excellence. We’ll include many services that might come into play over the lifecycle of a donor, including:

- Gift Acceptance Policies
- Investment Options
- Donor Contact
- Donor Recognition
- Special Services for Donors
- Donor Learning and Involvement

Session Flow

Three “peer leaders/storytellers” will offer brief presentations during this breakout session. Pat Vasbinder will facilitate the session and will also introduce the topic, presenters and the flow of the session to participants. We have asked the other presenters to focus attention on the donor service spectrum and to briefly tell *one specific* high-touch *rural* donor services story from your foundation experience.

Presenters were asked to tell their stories *like a story*, always emphasizing the practical over the theoretical. Participants will be provided with some specific “what to do’s, “what *not* to do’s” and “how-to’s” based on things presenters have learned. The session will flow something like this:

Pat	Intro, Context, Introductions	5 mins
Pat	What it takes to launch and sustain basic donor services...what makes donor services bodacious?	15 mins
Alex	High-touch spectrum + Donor Book Story	10 mins
Judy	High-touch spectrum + You choose	10 mins
Elizabeth	Donor Learning/Research Story	10 mins
Participants	Peer Advice and Stories <i>Open it up for others to present their approaches and challenges for advice and comment from Pat, Alex, Judy, Elizabeth & fellow participants.</i>	Remaining time

Presenters’ Assignment

The following is a five-step outline for the stories.

1. **Know your environment.** Think about the area in which you work. JUST FOR CONTEXT, start your story by listing **three key facts** that you (or the local organizers) knew (or assumed) about the place, your foundations' prior work with donors and the donors themselves. Here are a few suggestions:
 - Type and quantity of rural giving that had gone on
 - Type and quantity of rural wealth that was there
 - Type and quantity of endowment-building or donor-based “competitors”
 - State of the economy – local and global
 - Character of the place and its donors
2. **State the endowment-building goal.** Think about where your rural endowment-building effort was at the start of your story. Whether explicit or not, fully or not, did your donor services strategy have a specific fundraising goal statement like this in mind?

To build our rural endowment, we will raise _____ dollars from _____ donors (type and number) through _____ type of fund over _____ time.

If they had none or you have no idea, PLEASE JUST SKIP this and go to #3.

3. **Tactics, Targets & Story.** *This section is the guts and color of your story – and should take the most of your time.* Look at the attached “Tactic” drafts related to basic and high-touch donor services. Now tell us from your *real life experience*:
 - What is the list of high-touch services you provide to your *rural* donors? (Alex and Judy only)
 - If you do this in reality, please categorize which high-touch services go to which categories of donors. (Alex and Judy only)
 - If there is some basic service you provide to rural donors that was not on Pat Vasbinder’s list, please list what it is! (Alex and Judy only)
 - Now please tell us the one specific high-touch donor services story indicated in the “Session Flow” box above. (Alex, Judy and Elizabeth)
4. **Capacities.** Related to your specific approach to donor services and your story, please briefly detail the relevant capacities that you use or have had to newly develop to carry this off, in terms of:
 - Financial (cash, in-kind)
 - Staffing (who does the actual work -- CF and local volunteers)
 - Board involvement and role(s)
 - Expertise/policies learned/needed (converting bales of hay into endowment, flower arranging, press relations, drinking large quantities of one-bean coffee in one sitting, survey analysis, etc.)
 - Relationships
 - Other

Please – in this step, just tell us the facts. SAVE YOUR LESSONS FOR Step 5. (If you don’t, your story will take 20 minutes. We are trying to *start a conversation* with your story here, not deliver a lecture!)

5. **So what? Outcomes and Lessons.** Tell us the rural endowment-building outcome (good or bad, significant or paltry) related to your high-touch donor services and/or your story in terms of one or more of the following: dollars, range and number of donors, type of gifts, and enhanced endowment-building efforts that it has led to (or not). Please finish up with these **lessons**. Try to make them brief, clever and bumper-sticker-ish. Conclude by answering the following questions as they relate to your story and experience:
 - ✓ What are the top *three truest (positive or tough) lessons* your foundation or the community learned in developing and offering basic and/or bodacious donor services? (Or, if you had it to do over again, what are top *three things* you would or would not change about the design of your donor services efforts?)
 - ✓ What *three lessons or pieces of advice* would you offer to another community that is in the process of beginning or “touching **UP**” a donor services program?