

2.2 Expanding Your Pie: Partnering with Private Foundations, Government and Individual Philanthropists to Cook Up Plenty Rural Endowment

Friday, January 31 - 8:15 – 10:00 a.m.

Session Leader

Sidney Armstrong

Consultant; Former Executive Director, Montana Community Foundation

Peer Leaders/Storytellers

Diane Harrop: Board Member, Wyoming Community Foundation

Michael Chamberlain: Chief Development and Operating Officer, New Mexico Community Foundation

Christine Delport: Executive Director, Greater Rustenburg Community Foundation (South Africa)

Session Topic (text from Agenda)

“If we could only get that REALLYBIG private foundation, the Osbourne Family Fund, Mrs. Leevalegacy and/or Governor NoNewTaxes interested in helping us build our rural endowments... with their resources, it could make a real difference.” Well it *has* in some places and times, and a few of your colleagues can you tell you how they leveraged them in, kneading the dough slowly until they got a real rise out of some partners.

Session Flow

Three “peer leaders/storytellers” will lead this breakout session. Sidney Armstrong will facilitate the session and will also introduce the topic, presenters and the flow of the session to participants – and she’ll tell a story herself!

We have asked each presenter to focus attention on and briefly tell *one specific* story about building a partnership with another organization that led to rural endowment-building. The stories will be told *like stories*, always emphasizing the practical “what it really took” over the theoretical. Overall, the stories will provide participants with some specific “what to do’s, “what *not* to do’s” and “how-to’s” based on things learned. The session will flow something like this:

Sidney	Intro, Context, Introductions	5 mins
Sidney	Government: Getting the Governor and legislature to pass Montana Legislation	10 mins
Diane	Private Foundation: Landing the Kresge Challenge	10 mins
Bob	Local (Family?) Foundation: Getting McCune on board	10 mins
Christine	Local Corporations: Getting the Platinum Mine(s) to give	10 mins
Participants	Peer Advice and Stories <i>Open it up for others to present their approaches and challenges for advice and comment from Sidney, Diane, Bob, Christine & fellow participants.</i>	Remaining time

Presenters’ Assignment

- 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 your board and staff) knew (or assumed) about your place, the institutional resource partner (foundation, government, corporation) and your foundations’ prior work with the targeted institution. Here are a few suggestions:
 - Type and quantity of giving to rural endowment
 - 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 rural endowment-building goal.** Think about the endowment-building effort at the start of building your relationship with *the funding partner*. Whether explicit or not, fully or not, did your strategy have a specific fundraising goal statement like this in mind?

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

3. **The Story Itself.** *This section is the guts and color of your story – and should take the most of your time.* Simply tell us the *real life experience* of your story about how you worked to build a relationship with this partner that led to building endowment resources for rural. To keep from detailing each conversation, try to organize it into phases or stages of the relationship building, and list the types of things you had to do in each phase. (e.g., in the Getting to Know You Phase, our ED and one board member met with every significant corporate officer/legislator on the committee over the course of six weeks with this message: “_____”)
4. **Capacities.** Please briefly detail the list of relevant capacities that were used or newly developed over the course of this effort, in terms of:
- Financial (cash, in-kind)
 - Staffing (who did the actual work -- CF and local volunteers)
 - Board involvement and role(s)
 - Expertise/policies learned/needed (designing new match programs, golf lessons, 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 be 20 minutes. *Start a conversation* with your story here, don't deliver a lecture!)

5. **So what? Outcomes and Lessons.** Tell us the endowment-building outcome (good or bad, significant or paltry) related to your story in terms of one or more of the following:
- Dollars
 - Range and number of donors
 - Type of gifts
 - Enhanced endowment-building efforts that it has led to (or not) in the community/ area

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 as it developed this endowment-building partnership? (Or, if you had it to do over again, what are top *three things* you would -- or would not -- change about the design of this effort?)
- ✓ What *three lessons or pieces of advice* would you offer to another community foundation that is in the process of developing a similar partnership or relationship in hopes of building rural endowment?