

3.1 Endowment for What? Using Good Rural Program to Produce Great Rural Endowments

Friday, January 31 - 10:30 a.m. –12:15 p.m.

Session Leader

Janet Topolsky

Associate Director, Community Strategies Group, Aspen Institute

Peer Leaders/Storytellers

Diane Harrop: Board Member, Wyoming Community Foundation

Monica Mutuku: Director, Kenya Community Development Foundation

Session Topic (text from Agenda)

Everyone says they are connected – now we can prove it. This session will feature a few rousing and very stories from community foundations that have effectively utilized rural grantmaking and program efforts to spark and spur rural endowment building. And then you can all talk amongst yourselves about how you can try this at home!

Session Flow

Three “peer leaders/storytellers” will lead this breakout session. Janet Topolsky will facilitate the session and will also introduce the topic, presenters and the flow of the session to participants.

Presenters were asked to focus attention on and briefly tell *one specific* story from their foundation experience about building on your community foundation’s existing rural programmatic and community building work to develop rural endowment. Stories will be told *like stories*, always emphasizing the practical over the theoretical. Participants will be offered some specific “what to do’s,” “what *not* to do’s” and “how-to’s” based on things the presenters have learned. The session will flow something like this:

Janet	Intro, Context, Introductions	5 mins
Janet	Overview: Why/how link rural endowment building to rural program efforts? (include South Carolina Beaufort story)	10 mins
Bob	Raton Story	10 mins
Diane	Converse County Story	10 mins
Monica	South Imenti Story (sorry if that is spelled wrong!)	10 mins
Participants	Peer Advice and Stories <i>Open it up for others to present their approaches and challenges for advice and comment from Janet, Bob, Diane, Monica & fellow participants.</i>	Remaining time

Presenters’ Assignment

- I. **Know your environment.** Think about the area in which your story took place, and where you work. JUST FOR CONTEXT, start your story by listing **three key facts** that you (or your board and staff) knew (or assumed) about the place, about your foundations’ prior programmatic work in these rural communities, and about donors who care about the area. 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
 - Type of grantmaking you had done in the area

2. **State the endowment-building goal.** Think about the endowment-building effort at the start of your effort. Whether explicit or not, fully or not, did your link between program and endowment-building 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 there was none or you have no idea, PLEASE JUST SKIP this and go to #3.

3. **Tactics and Targets Chosen.** *This section is the guts and color of your story – and should take the most of your time.* Look at the attached matrix arraying tactics and donor targets for building rural endowment. Now tell us the *real life experience* of your story about how your community building/grantmaking work in this area built or leveraged into an endowment-building strategy – but please focus in your story on how those rural efforts used specific endowment-building tactics, and delineate which donor targets the effort was aiming at. If you used a tactic or target that is missing from the list, add it!

Please – in this step and Step 4, just tell us the facts. **SAVE YOUR LESSONS FOR Step 5.** (If you don't, your story will take 20 minutes. *Start a conversation with your story here, don't produce a lecture!*)

4. **Capacities.** Briefly detail the 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 volunteer?)
 - Board involvement and role(s)
 - Expertise/policies learned/needed (adjusting investment policies, devising a new kind of fund or match arrangement, converting bales of hay into endowment, press relations, drinking large quantities of weak one-bean coffee in one sitting, survey analysis, etc.)
 - Relationships
 - Other
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 about what it takes to capitalize on strong rural program work so as to build rural endowment? (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 drawing donor attention to and building rural endowments based on existing rural community building and program work?