

Identifying & Working With Local Leaders, Volunteers and Advisory Boards

Wednesday, 8:15-10:00 a.m. Room #4, Meeting Room Level

Terry Holley, Vice President for Programs and Rural Development

Heather Larkin Eason, Vice President, Development, Arkansas Community Foundation

Session Topic

The focus of this session is how your foundation finds and works with local leaders in underserved and well-served rural areas so as to help establish donor and advisor connections, or area fund or affiliate relationships to the central foundation. In addition, participants are interested in what techniques and support you use to train, sustain and effectively transition rural leaders and advisory bodies connected to the foundation.

Strategic Issue Breakout Session Flow

The flow of the breakout session will go something like this:

CSG Lead	Intro, Context, Introductions	5 minutes
Terry	ETF Approach and Experience	20 minutes
CSG Lead	<i>Question Queue</i> for Terry	15 minutes
Heather	ACF Approach and Experience	20 minutes
CSG Lead	<i>Question Queue</i> for Heather	15 minutes
CSG Lead	<i>Instant Advice</i> : Open it up for others to present their approaches and challenges for advice and comment from Heather, Terry and other participants.	Remainder of time

We will engage two process innovations during this session:

1. *The Question Queue*. We will ask participants to write their questions (and constructive ideas) on post-it notes for posting throughout the session — posing them to Terry, Heather, each other, or the cosmos. We will begin using these during Q&A. Aspen CSG will work with the presenters to answer any questions that are not answered during the session on the RDPLN website in the week or two following the workshop.
2. *Instant Advice*. In the last segment of the session, we will ask any participant to pose in 5 (or fewer) minutes a situation they are facing in relation to the breakout topic, and then we will ask participants for their Instant Advice responses of one minute or less (with post-its encouraged as well).

Note: We may adjust this process a bit, but you get the idea.

Presentation Outline

Here are the questions we asked Terry and Heather to focus on during their initial *Identifying & Working With Local Leaders, Volunteers & Advisory Boards* presentation.

1. **Your Structure**. Just for context, tell us what rural coverage structure you think your foundation represents. (See attached draft *Rural Coverage Structures and Characteristics* matrix).

(over)

2. ***Your Approach to Rural Leadership Identification.*** Please describe your foundation's approach and process for *identifying and finding* leaders in underserved rural areas and connecting them to the foundation. If applicable to your foundation, address how you surface the usual and unusual suspects for:
 - Formal or informal advisors (individuals)
 - Lead rural donors
 - Rural organizing or advisory committees
 - Foundation board members
 - Rural organizations that cheerlead for the foundation
 - Other volunteers

3. ***Your Approach to Rural Leadership Training.*** Please describe what you do to train identified rural leaders in the ways and whys of the community foundation. For example:
 - What process, techniques and materials do you use to help and new rural individual or group get what the community foundation is and how it might be useful to them?
 - In what order (if any) do you generally introduce community foundation concepts and activities to rural leaders and advisors?
 - What ongoing board, staff or training support do you provide to rural-based advisory bodies — for example, rural grant committees or affiliate boards — to help increase their community foundation engagement and expertise?
 - How do you engage rural leaders in the ownership and activities of the central foundation?

4. ***Your Approach to Leadership Transition.*** Please describe what you do to help established rural leadership committees or boards transition their leadership over time and thus build more local ownership of and legacy in community foundation activity. For example:
 - What do your rural advisory bodies or boards do effectively to identify and orient new members or volunteers for local foundation activity? What role does the central foundation play in this?
 - How do you keep lapsed or emeritus rural leaders engaged in the foundation's activities?

5. ***Resources.*** Please tell us briefly what staff time and financial resources it takes for you to do the above, and how your organization and operations are organized to support it.

6. ***The Lessons.*** Please finish up with these lessons.
 - What are the top 3 *toughest things* your foundation has experienced in identifying and working with local rural leaders?
 - What are the top 3 *best things* that working with rural leaders has produced for your foundation?
 - What 3 *lessons or pieces of advice* would you offer to another community foundation that seeks to identify and involve more leaders from underserved rural areas - things that are different from identifying urban or metropolitan leaders?