

Covering Rural Territory: Case Studies

Tuesday Morning and early afternoon

Ben Johnson, President and CEO, Greater New Orleans Foundation

Elizabeth Myrick, Senior Associate, Aspen Institute CSG; former Program Director, Maine CF

Pat Vasbinder, Former Vice President and Chief Operating Officer, New Hampshire CF

Jeffrey Yost, Executive Vice President and Chief Operating Officer, Nebraska Community Foundation

Peter Pennekamp, Executive Director, Humboldt Area Foundation

Session Orientation and Flow

After our workshop introduction and a motivating and spirit-filled keynote by Marion Kane on Tuesday morning, we will go straight into substance — devoting the remainder of the morning to back-to-back presentations on what we consider to be the five (of six) lead structure models for covering rural territory. The presenters below will each describe one of these structures and what they have learned about implementing it in their specific locations.

- *Consolidated Service Structure*: Ben Johnson — Greater New Orleans Foundation
- *Area Funds Structure*: Elizabeth Myrick - Maine Community Foundation
- *Federation Structure*: Pat Vasbinder — New Hampshire Charitable Foundation
- *Service Bureau Structure*: Jeff Yost — Nebraska Community Foundation
- *Incubator Structure*: Peter Pennekamp — Humboldt Area Foundation

After lunch, we will go into five breakouts — one for each structure, so that you can go deep with the model that most interests you without using the time of all participants. We will assign a facilitator to each breakout to help field questions and move the session along.

These structure models and the relationships and distinctions among them are a piece of basic intellectual capital we are offering the field to use as fodder for improving Rural Development Philanthropy. We are not trying to advocate, rather we are trying to surface and detail useful distinctions and constructive questions that will improve the thinking and doing of community foundation leaders who want to do rural well. We expect that this workshop will provoke and produce much commentary and feedback on the structures — and we surely invite it!

Presentation Outline

Here are the questions we asked each resource presenter to focus on during their initial presentation.

Note: We know that a few of the questions or sub-questions are more important or relevant to some structure's development than others. If that is the case, the presenters will focus on those areas or issues that they think are most important to the model.

1. ***Introduction.***
Name your model - and offer whatever brief orienting introduction you want (if any).
2. ***What initially motivated your foundation to develop its structure for rural coverage?*** Using the *Rural Catalysts* categories and descriptions, tell us what the primary initiators have been that have moved you to consider rural coverage and the use of this particular rural coverage structure. If the structure is the result of an evolution of structures that had different motivators over time, name them all but focus on what has landed you with the model you are detailing today.

(over)

3. **What three (or so) things (geographic, cultural, economic, historic, whatever) do we need to know about your foundation's region that will be important to understanding why you chose this structure?**

4. **Now elucidate your particular rural coverage structure.** To do so, address these questions or points:

- What are the community foundation's *key goals or values* that underlie the choice of this structure?

- In *operational terms*, describe the structure and how it works. This is where you outline the *basics* of what you are doing without yet getting into detail on the below issues.

- *Governance and Representation and Roles:* In your structure,

What type of rural advisors or advisory bodies do you have that connect to the central foundation?

What roles does each body or type of advisor play in program/ grantmaking, endowment building and policy setting for its rural area?

What authority do they have — whether legal or not? (In other words, what does the central foundation let rural advisors make decisions on — and then generally simply approve?)

In what ways and with what roles and authority do rural advisors connect to the program/grantmaking, endowment building and policy setting for the central (parent) foundation and/or the entire region?

*And ..*What is the central foundation's method for finding, orienting, sustaining and transitioning local rural advisors?

- *Management and Staffing:* In your structure,

What deal does the central foundation offer its component rural entities (whether divisions, funds, affiliates, whatever). That is, what will the central foundation do for and provide to the local rural entity, and what must the rural entity do for itself or provide to the central foundation?

What staff and financial resources does the central foundation devote to the development and maintenance of this rural coverage structure?

What is the fee arrangement and investment policy of the central foundation in relation to the rural entities and the philanthropic funds they generate?

From a cost-benefit standpoint, how do you justify this structure? How (or at what point) does this structure pay for itself? Or do you subsidize it for some non-financial reason?

5. *How is it working?* Tell us:

- What are the top 3-5 *toughest things* you have experienced in establishing and maintaining this structure?
- What are the top 3-5 *best things* about using this structure to promote Rural Development Philanthropy in your context?
- What 3-5 *lessons or pieces of advice* would you offer to another community foundation that wants to develop this rural coverage structure?