

MATRIX OF MOST EFFECTIVE TACTICS FOR REACHING RURAL DONOR GROUPS  
DONOR GROUPS

Tactic	High-wealth	General public	High-wealth	General public	2nd-home owners	Snow/ Sun birds	Alumni	Locally owned	Absentee	Stakeholders	Nonprofs/schools/churches	Government	National	Family	Corporate
Educate Professional advisors	X		X								X				
Exclusive events	X		X		X										
Community events		X			X	X	X	X							
Cultivate one-on-one relationships	X				X								X	X	X
Provide match incentive		X					X	X	X	X	X	X		X	X
Pitch via direct mail		X		X		X	X								
Reach out to local media	X	X		X				X							
Ensure high-quality "basic" services	X	X		X	X	X	X				X				
Offer menu of "high touch" donor services	X		X											X	
Emphasize donor-advised funds			X												
Emphasize community and/or area funds		X		X				X	X	X		X		X	
Emphasize issue-oriented and/or unrestricted funds				X	X	X	X	X	X	X		X	X	X	X
Emphasize agency endowments and scholarship funds			X		X		X				X				
Emphasize foundation's leadership and program delivery								X							

Current donors | Current residents | Part time / Former residents | Business | Organizations | Foundations

Community Foundation of Greater Dubuque

# Building Your Rural Endowment

## Choose your tactics

You've got a rural endowment-building goal. That's great. Now what tactics will you use to achieve it? Choosing the right tactics that will help you achieve your goal is important.

You want to choose tactics that have three primary qualities:

- They will help you achieve your goal-that is, they actually *work!*
- They also will advance or reinforce the market position you want to establish.
- You have the capacity to carry them off.

## Matching tactics with donor targets

Over the last decade, community foundations have noted that there are 14 primary tactics that community foundations use to build rural endowment. Namely:

- Educate professional advisors
- Exclusive events
- Community events
- Cultivate one-on-one relationships (with specific types of rural donors)
- Provide match incentive
- Pitch via direct mail
- Reach out to local media
- Ensure high-quality "basic" donor services
- Offer menu of "high touch" donor services
- Emphasize donor-advised funds
- Emphasize community and/or area funds
- Emphasize issue-oriented and/or unrestricted funds
- Emphasize agency endowments and scholarship funds
- Emphasize foundation's leadership and program delivery

These tactics are not mutually exclusive; in fact, sometimes they are better used in tandem to support each other. But each can be separated out, considered and weighed individually. And each tends to be utilized better with certain donor targets than others.

This will help you think about and choose your tactics, basically answering the question: *How will we achieve our goal?* To move forward in determining this, have your rural endowment-building team follow these steps:

a) Look first at the **Matrix of Most Effective Tactics for Reaching Rural Donor Groups**. This matrix lists which tactics tend to be used most successfully with which donor targets, based on Rural Community Foundation experience. Check the column for your goals' donor targets, and note which tactics got a checkmark.

**b) Explore the tactics. After the matrix, you will find a two page summary description and discussion of each tactic. Each of these summaries details:**

- **Explanation of the tactic**
- **Best donor target(s)**
- **Helpful capacities (for implementing the tactic)**
- **Obstacles/challenges**
- **Pay off**
- **Pay-off horizon**
- **Gifts**

**Read through these brief summaries for the tactics you noted in (a). Consider which tactics you think will best suit you, your foundation's current capacities, and your market position in order to reach your goal.**

**Don't be constrained by the Matrix! Please review all the other tactics as well, if you are so inclined. And add any you think are missing!**

**c) Choose your tactics. Have your team come to agreement on what tactic or set of tactics you plan to use to achieve your rural endowment-building goal. Note the combination of "helpful capacities" and "challenges" each entails.**

## **TACTIC 1: Educate Professional Advisors**

### **Explanation:**

Educating professional advisors includes any one or a combination of activities or events aimed at sharing information about the community foundation-or endowed philanthropy in general-with individuals who advise potential donors on financial matters, especially will and estate planning. In rural communities, general-practice attorneys often play this role; however, financial advisors may also include accountants, financial planners and trust attorneys, bankers and funeral home directors residing in or outside the rural community. In some states and regions, financial planners have formed associations or planned giving councils (see [www.ncpg.org](http://www.ncpg.org)) that can provide useful tips and partners for educational activities, especially when the community foundation hopes to encourage and increase participation by offering continuing education credits.

### **Best target(s):**

- High wealth donors (current and prospective)
- Nonprofit organizations for agency endowments

### **Helpful capacities:**

- Referrals to rural-based advisors who work with rural clients on wills, bequests, trusts, etc.
- Trusting relationships with regional financial advisors who work in rural areas
- Established Leave A Legacy (see [www.leavealegacy.org](http://www.leavealegacy.org)) program in region
- Staff/organizational capacity to accept gifts of stock, trusts, bequests, etc.

### **Obstacles/challenges:**

- Identifying the advisors themselves
- Hiring or training staff on planned giving issues
- Building relationships and credibility (trust) with rural attorneys, financial planners
- Perceived issues of competition with financial planners and advisors
- Limited number and capability of rural financial advisors
- May have trouble drawing advisors to education events

## Pay off:

- *Huge* leverage point-bequests can be an even greater source of contributions in rural communities than in metro areas since wealth may be held in land or other non-cash holdings
- In rural communities, the "town lawyer" is often a respected figure who advises clients while also lending instant credibility to foundation's mission
- Access to intellectual capital: wealth/assets held within small, rural communities are guarded-financial planners can assess a region's fundraising potential in ways few others can

## Pay-off horizon:

Intermediate and long-term

## Gifts:

### Intermediate

- Gifts might begin as non-endowed and later become endowed (either at donor's death or during the donor's lifetime, if donor becomes satisfied with service)
- Donor-advised and designated funds through vehicles such as charitable remainder trusts and through gifts of stock, land and other appreciated assets as well as contributions given during donor's lifetime to avoid estate taxes or to help donor introduce family members to philanthropic giving

### Long-term

- Bequests

## Examples:

- Maine Community Foundation
- The Community Foundation Serving Coastal South Carolina
- Parkersburg Area Community Foundation

## **TACTIC 2: Exclusive Events**

### **Explanation:**

Community foundation joins with an individual donor/host to invite high wealth prospects to an invitation-only dinner, cocktail hour, exhibit or reception where guests mingle with one another or tour a beautiful home and at some point during the event hear some information about the community foundation, what it does and how they can become involved.

### **Best target(s):**

- High wealth donors (current and prospective)
- Second home owners

### **Helpful capacities:**

- Event planning expertise
- The right guest list: people/homes that others admire, envy or aspire to be
- Group of similarly situated high wealth individuals to invite the "right" individual willing to host an event
- Inspiring community foundation representative who briefly and deftly describes difficult-to-grasp ideas: endowment, community-building, etc.
- Ability to follow up event with a specific request for a gift or "the ask"
- Pre-planning: what is the goal, what is the message, who is the audience
- Helps to have a gift or challenge to announce or if a large gift can be announced

### **Obstacles/challenges:**

- Cost-these are not events to "skimp" on-helps if the host offers to foot the bill
- Critical mass of people to create "giving peer pressure"
- Inviting the right people, timing, etc.-events must be highly orchestrated; easy to become "just another cocktail party"
- Host and/or staff follow-up since checks are often not written until after the event
- This audience requires hands-on and professional services, so staff time must be committed

## Pay off:

- Introduces foundation to community's high wealth individuals through an admired friend/colleague
- Connects endowment to the "right" set of people-connects foundation to social aspirations
- Pay-off may be long-term (bequests may result from the event)
- A sense of excitement and celebration around community endowment
- Gives staff a reference point when following up on new prospects: "I met you at so-and-so's home... "
- May lead to gifts to other community foundation funds
- More potential for contributions than the community social event (See *Tactic 3*), but pay-off usually is not immediate

## Pay-off horizon:

Mostly intermediate or long-term

## Gifts:

- Bequests (see *Tactic 1: it is wise to coordinate with professional advisors to follow up these events*)
- Depending on "theme" of event, may result in small gifts to particular community or issue-oriented funds

## Examples:

- The Community Foundation Serving Coastal South Carolina
- Maine Community Foundation
- New Hampshire Charitable Foundation

## TACTIC 3: Community Events

### Explanation:

Community events can be similar to exclusive events, but are carried off in a more homespun and inclusive manner. Community foundations can partner with a community organization (grange, community center, civic group, grantees) to host a "come one, come all" community dinner, festival or reception. Depending on the event, the foundation can send individual invitations, publicize in local media or even sell tickets. These events allow for mingling but may also showcase community foundation grantees and include some information about the foundation and its role in the community. Most importantly, it provides an opportunity to tell people how they might get involved by giving financially or volunteering. Some foundations hold these events annually and hand out grant checks. Others use these events as traditional fundraisers-selling tickets, holding raffles, silent auctions, etc.

### Best target(s):

- General public
- Current donors
- Second home owners
- Snow/sun birds
- Alumni of the region or community
- Locally owned businesses

### Helpful capacities:

- A "hook": something unique and place-based that will draw people-hint: the word *endowment* doesn't do it
- Inspiring community foundation representative who is able to briefly and deftly describe difficult-to-grasp ideas: endowment, community-building, etc.
- An active force of on-the-ground volunteers to help design, invite and host
- Staff-time to coordinate invitations, facilitate volunteers and keep things moving
- Pre-planning: what is the goal, what is the message, who is the audience
- Helps to have a new challenge or match or grant recipients to announce-especially if the press is present
- FOLLOW-UP: who, when and how to follow up quickly after the event
- If new to region, consider co-hosting with established community group



## Obstacles/challenges:

- Cost-must decide whether to charge admission or choose other methods to cover costs
- Must walk line between celebratory and fundraising-this group may not be used to the "cocktail party ask"
- The impact of these events can be varied: the diversity of participants may lead to diverse requests. Prospective donors, grantees, the press, local government each may ask for follow-up
- Invitation list is critical-look for mix of people, but be aware, grant *seekers* are the most likely to show up

## Pay off:

- Events help affirm foundation's commitment to specific region
- Offer the chance to mix social groups and give face to philanthropy
- These events say: "Everyone can be a philanthropist"
- Celebrate nonprofits and help remind people of the *NPs* contribution to communities-could help increase donation to showcased *NPs*
- Potential for sparking people's desire help with fundraising and community-building cause
- Good public relations and positive press
- Can lead to new community foundation volunteers
- Lower potential for gifts
- *Community Building!*

## Pay-off horizon:

Immediate and long-term

## Gifts:

- Depending on "theme" of event, may result in small gifts from both individuals and businesses to particular community or issue-oriented funds
- *Bequests (see "Educate Financial Advisors, "as it is wise to coordinate with professional advisors to follow up these events)*

## Examples:

- Montana Community Foundation
- Maine Community Foundation
- New Mexico Community Foundation

## **TACTIC 4: Cultivate One-On-One Relationships**

### Explanation:

This tactic is pretty self-explanatory, but still sounds simpler than it is. Trust, credibility and personal comfort are the keys to successfully building any relationship-whether with an individual or an institution. One-on-one relationships with individual donors, prospective donors and foundation officers require preparation, administrative support, follow-through and schmoozing to sustain positive feelings and credibility between that individual and the community foundation, as an institution.

Many foundations bolster these relationships by remembering donor birthdays, sending personal notes, providing customized research on a donor's charitable passion. Foundations with large enough staffs also "assign" a staff member to be the point of contact for the donor. Often, the president/CEO is the main relationship-builder for the foundation. Regardless, "data" regarding donor interests, family members and personal likes and dislikes must be assembled and constantly updated. Relationships must also be cultivated through consistent contact-which may be a challenge when donors are spread far and wide across a rural region or when donors summer or winter elsewhere.

Relationships with national, private and corporate foundations are often initiated by that national, private and corporate foundation itself. Or, in some cases, a foundation's known role as a community leader and a successful deliverer of programs leads to national, private or corporate foundation interest. Nevertheless, it is incumbent upon the *community foundation* to maintain this relationship over time by applying similar attention to preparation, administrative support and follow-through that it would provide to individual donors.

### Best target(s):

- High wealth individuals
- Second home owners or snow/sun birds
- National, family and corporate foundations

### Helpful capacities:

- Relationships with "gatekeepers"-someone whom the donor or foundation program officer trusts that introduces staff or board members to the donor
- Organizational (often technological) capacity to track key information about relationships (from birthdays to spouse's name to fund balances)
- Referrals to prospective donors as well as foundation staff
- Staff and board member time to initiate and, more importantly, to follow up on meetings
- Staff and board members with highly tuned interpersonal skills and manners
- Ability and inclination to "make the ask" at the right time for the right amount

**Obstacles/challenges:**

- Relationships are always labor intensive; these relationships often revolve around delicate family, financial and other personal matters; must protect privacy of donors through systems that ensure confidentiality
- This tactic can require a high level of "back-office" support to make the relationship appear as effortless and unforced as possible
- Changes in staff can affect these relationships--efforts should be made to ensure that the trust and credibility is built for both the community foundation *and* the individual staff members who come and go

**Pay off:**

This is absolutely the most effective method of building endowed assets--immediately and over time as the relationship with the individual donor or institution matures

**Pay-off horizon:**

Immediate and long-term

**Gifts:**

- Immediate gifts establishing or contributing to the range of funds, as well as bequests
- Foundations often provide pass-through grants and operating support for specific initiatives as well as matching funds to encourage local endowment building

**Examples:**

All foundations

## **TACTIC 5: Provide Match Incentive**

### Explanation:

A challenge grant or "match" involves using a portion of existing funds as an incentive for others to give. Prospective donors are encouraged to give because their gifts will be "matched" at a certain level by another donor or fund. For example, community members might be asked to give because every dollar they give will be matched 1-1 allowing that donor, in effect, to "double their money." The match can be offered at 50 cents on the dollar, \$2 for every dollar raised, etc.

### Best target(s):

- General public
- High wealth individuals
- Alumni of community or region
- Locally owned, absentee and stakeholder businesses
- Nonprofits and government
- Family and corporate foundations

### Helpful capacities:

- Ability to re-direct existing funds
- Individual donor or private foundation gift
- Corporate gift
- Ability to implement a campaign-like strategy to raise endowment
- Financial and administrative capacities to manage the gifts and the match

### Obstacles/challenges:

- Finding matching funds
- Setting appropriate match
- Developing an effective campaign message-"endowment for what?"

### Pay off:

- Brings urgency to what is often a long-term process
- Allows individual gifts to become more substantial which is important when raising large sums for endowment-since only five percent will be immediately apparent
- Offers fundraisers a vehicle for approaching a potential donor
- Can be combined with another tactic to make it more urgent, inclusive or successful
- Offers structure for involving corporate or foundation giving in building community endowments
- Can be useful in kick-starting fundraising campaign

Pay-off horizon:

Immediate

Gifts:

- Small and large gifts from both individuals and businesses to particular community or issue-oriented funds and scholarships
- Agency endowments (when nonprofits are offered matching funds to establish an agency endowment)
- Operating endowment for the community foundation itself

Examples:

- Montana Community Foundation
- Maine Community Foundation
- Northwest Arkansas Foundation
- Kenya Community Development Foundation

## **TACTIC 6: Pitch Via Direct Mail**

### **Explanation:**

More often than not, direct mail is used to reach the broadest possible audience, but with a narrower message. Depending on the community foundation's ability to develop mailing lists and to cover postage expense, direct mail could include personally addressed letters describing a particular field of interest fund or community/area fund and a return envelope, or it might be an insert in the region's newspaper or even in utility bills. The method casts a wide net and focuses on communicating the "short and sweet" of the community foundation to the community.

### **Best target(s):**

- General public
- Snow/sun birds
- Alumni of community or region

### **Helpful capacities:**

- Funds (often area or unrestricted funds) suited to accepting and pooling multiple small contributions
- In some cases, community leaders to write the letter *on behalf* of the community foundation
- Committee or staff willingness to help create and keep current mailing list, sign appeal letters and add personal notes
- Technology to manage and update mailing database
- Staff time to manage process and accept/acknowledge/track numerous, small contributions

### **Obstacles/challenges:**

- Volunteers may be averse to sending/signing appeal letters to friends/family
- May give the impression of competing with smaller nonprofits annual appeals
- Costs of staff time and mailing expenses
- Broad, not deep impact-not traditional community foundation approach since more difficult for letter to sell "endowment" than, say, a new church steeple or playground

### Pay off:

- Good way to blanket a region and build awareness of community foundation
- Gives every level of donor a chance to contribute and become part of the community foundation "family"
- Donors may "try out" giving through relative anonymity of appeal envelope and later give more or add community foundation to will
- Good way to ease a volunteer committee into fundraising
- Great way to reach goal of increasing *numbers* of gifts especially for fund that has had corporate or "angel donors"

### Pay-off horizon:

Immediate

### Gifts:

- Small and large gifts from both individuals and businesses to particular community or issue-oriented funds and scholarships (and sometimes operating endowment)
- Gifts to agency endowments (when nonprofits with agency endowments join in appeal)

## **TACTIC 7: Reach Out To Local Media**

### **Explanation:**

Community foundations initiate a range of activities to develop public awareness of the existence and role of the community foundation through contacts and relationships with local media. This is less direct than other endowment-building tactics in that the immediate goal is to raise a positive profile of the foundation in the community in ways that will then lead to gifts.

Rural media may include daily, weekly and monthly newspapers, locally owned, private radio and television stations, community radio and public television stations, regional magazines as well as community websites. Many community foundations begin by having lunch or a meeting with editors, programmers and web designers to raise that individual's awareness of the community foundation and, hopefully, ensure coverage of the foundation's newsworthy events. Some community foundations sponsor shows or -time slots on community and public radio and television as one method of advertising. Still others actively seek opportunities to appear on local radio and television shows to help the region match a "face/voice" with the community foundation. As community foundations raise their profile and/or make grants on specific issues, some are asked by the media to appear or comment on community issues as they arise.

### **Best target(s):**

- General public (current and prospective donors)
- Locally owned businesses

### **Helpful capacities:**

- Something to point at, such as successful grants or gifts to endowment
- A media kit is extremely useful-it should contain your consistent and concise message along with some "real life" stories, profiles of key staff, board members, donors and grantees as well as a media-friendly description of how to give
- Willingness to meet local reporters on their own (sometimes distant) turf
- Openness to press presence in grantmaking, committee meetings, etc.
- Local volunteers and staff willing to follow-up



### Obstacles/challenges:

- Challenge of getting message out through intermediary-point may be missed, names may be misspelled, etc.
- What the community foundation considers newsworthy may not match what an editor believes-this is where relationships with staff writers, editors, etc., can influence coverage
- Donors and/or board may want foundation to stay behind the scenes and more lowkey - may be seen as self-promoting
- There is always risk that press may not be flattering
- Takes staff and volunteer time, travel and persistence

### Pay off:

- Good way to get message out and build awareness-particularly among local government and other local players
- Shows relevance and impact of community foundation in local community
- Local press tend to know everyone and everything-this is a good network for community foundation to develop for grantmaking and development
- Consistent, objective appearances in local press can introduce the community foundation to donors who never would have been found otherwise-a good way to find "angel donors"

### Pay-off horizon:

Long-term

### Gifts:

Depends on focus of media coverage, might include contributions to area, unrestricted or issue-oriented pooled funds as well as establishment of donor advised, designated and scholarship funds

### Examples:

Nebraska Community Foundation

## **TACTIC 8: Ensure High Quality "Basic" Donor Services**

### **Explanation:**

Basic donor services include those activities and systems offered to all donors. While services may differ somewhat depending upon whether a donor is one of many givers to a pooled fund or is the sole establisher of a fund, some basic donor services are offered to every contributor regardless of the size of their gifts.

To ensure basic donor services, community foundation boards ratify policies to assure donors that gifts can be effectively and legally accepted. Systems are then established that respond automatically each time the community foundation receives a new gift.

Basic donor services include:

- Donors receive detailed, but straightforward information about community foundation's mission, procedures and policies as well as donor responsibilities
- Gifts are acknowledged promptly
- Gifts of cash (or sale of stock or other non-cash gifts occurs) are deposited promptly
- Community foundation's status as a public charity under federal tax laws (allowing donors maximum deductibility for income, gift and estate tax purposes) is kept current
- Gifts are directed to the appropriate foundation fund(s)
- Funds are accepted under board-approved and shared gift acceptance policy
- Funds are invested under board-approved and shared investment policy
- Fund statements are accurate and distributed on a timely basis
- Fund balances are available to fund advisors upon request
- All grantmaking is carried out according to the foundation's mission and board policies
- Credible financial accounting and audits, overseen by board and independent auditor
- Community foundation has capacity to accept non-cash gifts and to work with financial advisors and accept planned gifts
- Friendly and courteous staff or volunteers are available at prescribed times to answer questions and address concerns
- Inclusion in community foundation's basic communications materials: newsletters, annual reports, on-line materials

### **Best target(s):**

All donors

### Helpful capacities:

- Staff and/or volunteer financial and legal capacity to establish financial systems and policies and to carry out complex financial transactions
- Technology (hardware, software and training) to support systems and policies
- Shared commitment of all staff (regardless of function) to achieving 100 percent success in providing all donors with basic donor services
- Methods for tracking and addressing donor satisfaction, complaints and "supplemental gifts." These methods can be as simple as a spreadsheet or donor list with someone assigned to track new gifts to existing funds or as formal as an annual donor survey of leading indicators of satisfaction.

### Obstacles/challenges:

- Depending on the size of the foundation (number of staff, number of donors), basic donor services can be more or less taxing-sudden growth in the foundation's assets sometimes leads to deterioration of donor services
- Basic donor services are often taken for granted by both donor and staff-it takes discipline to maintain the more rudimentary systems and procedures
- Tracking donor satisfaction can be challenging; however, it is a good use of foundation resources to invest in tracking donor satisfaction; just tracking donor dissatisfaction (through complaint logs) is not sufficient

### Pay off:

- Most foundations find that the majority of annual gifts comes from *existing* donors-treat *your current customers well and they will continue to give*
- Surprise gifts! More sizeable bequests often come from donors who make small gifts during their lifetime, but grow to trust the community foundation over time

### Pay-off horizon:

Immediate and long-term

### Gifts:

All funds

### Examples:

The Community Foundation Serving Coastal South Carolina

## TACTIC 9: Offer Menu of "High-Touch" Donor Services

### Explanation:

High-touch donor services supplement basic donor services for a select group of either current or potential high-wealth donors on whom the foundation will bestow more frequent contact as well as special services, appreciation and rewards. The word *menu* above is key to this tactic, in that the donor selects discreet services offered by the foundation that can be *customized* for that donor. By providing a menu for the range of services a donor of significant means might expect, the community foundation can both *impress the donor and prevent the community foundation from over-extending itself with a blank statement of "whatever the donor wants, we can do..."*

High-touch donor services are most often offered at a designated threshold of giving—for example, donors of \$25,000 and above receive a certain level of services, donors of \$100,000 receive others. Some foundations also offer a range of special services to donors who are board members, donors who give significantly to the foundation's operating endowment, or annual fund, or donors who give significantly to the foundation's unrestricted funds. Becoming specific about high-touch donor services can help the foundation place a price tag on each of them—allowing the foundation to choose at what threshold of contribution it will become cost effective to provide them. As a starting point, the community foundation might meet with a select group of existing high-wealth donors or board members to explore the types of ad hoc services these stakeholders have or would like to have offered. Most often, the menu of "high touch" donor services include the following:

- Key contact—a designated staff member assigned to donor and fund
- Upon request, nonprofit research, advice and site visits provided by professional program staff
- Group activities (site visits, dinners, discussion groups, presentations) with other donors and/or nonprofit leaders with similar interests
- When appropriate, referrals of grant applications or nonprofit programs that match donor's specified interests
- Regular luncheons or meetings with development or executive staff to discuss philanthropic ideas and satisfaction with community foundation services
- Diverse investment options
- A sliding scale of fees—i.e., the larger the fund, the lower the annual fees

### Best target(s):

- Current high-wealth donors
- Prospective high-wealth donors
- Family foundations

### Helpful capacities:

- Staffing—the type of services promised can be extremely staff-intensive even when only a small number of donors are involved

- Entire organization is donor-service oriented-particularly at donor points of contact
- Ability to judge realistically the current, imminent and long-term growth and capacity of the organization-in other words, donors who receive certain services at the start will always expect them, so be sure you can provide 10 donors with the same level of services you will someday need to provide 50-100 donors
- The ability to say "no" to certain donor requests for ethical and legal reasons, obviously, but also when such requests threaten the financial sustainability of the organization; high-touch services should bring in considerably more money than they cost to provide
- *More and variation:* capacities depend on the services the foundation chooses to offer

#### Obstacles/challenges:

- Sudden growth in number or demand of "high-touch" donors can lead to imbalance between cost of services and size of gifts/fees
- The benefits of providing high-touch services can be great, but it is critical that *basic donor services* are flawless before high-touch services are attempted-nothing is worse than having an error-ridden fund statement arrive the same day as an invitation to a high-touch donor luncheon
- Donors may not necessarily link the special, customized services with the community foundation's efforts to develop additional gifts. With existing donors, the "ask" (and for these donors, an even more carefully crafted "ask") is just as important as it was during initial meetings

#### Pay off:

Again, existing donors are your best source for additional funds and high touch-donor services target the donors who are best situated to give more.

This is the most direct approach to increasing endowment-these are individuals who already know and love you: you simply need to deepen your bonds.

#### Pay-off horizon:

Immediate and long-term

#### Gifts:

- To existing endowments
- Also, to special issue funds, unrestricted and operating funds (keep in mind though, that donors may choose to transfer funds from existing advised funds to the new fund, resulting in no net gain for the foundation's total assets)

#### Examples:

- Humboldt Area Foundation
- Maine Community Foundation

*What if you could reduce hunger?  
'(ti"hat if you could teach someone to read?  
What f you could share the joy of the arts with others?  
' W hat if-you could leave a legacy for generations to come?*

*Please join us for a Summer Gathering in our home.*

*1Rela,~ with good company.*

*Et joy scrumptious desserts, wine and coffee.*

*Learn about your Community Foundation.*

*TVhere: ~1~oss and Sally's*

*Address*

*When: `Wednesday, June 2.3, 2004*

*Seven o'clock p. m.*

*c5AAP- Sally Phone #*

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resources to male our community a better place to five?*

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