

CENTENNIAL PLAN

STRATEGIES FOR A STRONG COMMUNITY FOUNDATION FIELD 2011-2014

SEPTEMBER 2010

1

ORGANIZATION IN
CLEVELAND, OHIO
STARTED IT ALL

4.6

BILLION DOLLARS PUT TO
WORK EACH YEAR SERVING
DONORS AND STRENGTHENING
COMMUNITIES

717

INSTITUTIONS STRONG,
USING IN-DEPTH
KNOWLEDGE OF LOCAL
ISSUES AND RESOURCES

86

PERCENT OF THE U.S.
POPULATION SERVED

100

YEARS LATER, WE'VE BECOME A
VIBRANT, COLLABORATIVE FIELD

WHAT DOES IT ALL ADD UP TO? **WE DECIDE TOGETHER.**



COUNCIL *on* FOUNDATIONS

Community Foundations Leadership Team

Serving and Representing All Community Foundations

Today serving an estimated 86% of the U.S. population, the community foundation field is as diverse—in communities served, asset size, development approach and program emphasis—as it is vast.

The Community Foundations Leadership Team (CFLT) exists to serve and represent all members of this growing field, providing leadership for community foundations as a collective, and advising the delivery of services that benefit each local organization.

VISION FOR COMMUNITY FOUNDATIONS

We are recognized leaders and valued partners strengthening our communities through effective philanthropy and convening based on intimate knowledge of the community and expertise.

MISSION OF THE COMMUNITY FOUNDATIONS LEADERSHIP TEAM

To serve as a strong voice, advocate and resource for community foundations.

100

100-YEAR ANNIVERSARY of the
FIRST COMMUNITY FOUNDATION

The CFLT serves the diversity of community foundations that, in turn, serve communities across the United States.

MIDWEST	
Total # Foundations	221
Total Assets	\$14.9B
% of Assets of Field	31%
Average Asset Size	\$68M
Average Population Served	463k
% of Population Covered	86%
WEST	
Total # Foundations	80
Total Assets	\$10.9B
% of Assets of Field	23%
Average Asset Size	\$137M
Average Population Served	1.3M
% of Population Covered	98%
NORTHEAST	
Total # Foundations	73
Total Assets	\$7.8B
% of Assets of Field	16%
Average Asset Size	\$107M
Average Population Served	1.1M
% of Population Covered	96%
SOUTH	
Total # Foundations	121
Total Assets	\$14.4B
% of Assets of Field	30%
Average Asset Size	\$119M
Average Population Served	1.1M
% of Population Covered	72%

See the last page for a list of CFLT members and Council on Foundations staff serving community foundations.

To sustain and grow, community foundations must demonstrate active community leadership, anticipate trends, respond quickly to opportunities and threats, and often act in concert as a field. As community foundations engaged in strategies defined by the CFLT Plan of Action, 2007–2010, we have advanced community philanthropy by:

- Sharing our work as a professional learning community
- Committing to and upholding National Standards for U.S. Community Foundations
- Elevating the visibility of a field-wide identity and value
- Investing in innovations that strengthen the field
- Promoting a legislative agenda for community benefit energized by a common voice
- Engaging the diversity of our communities and board members to work on behalf of the needs of virtually all communities across our nation

Despite an economic downturn that calls to mind the Great Depression faced by the country’s earliest community foundations, the momentum created by these accomplishments (see page 7 for detail) poises our field to make significant strides outlined in the Centennial Plan.

REALIZING YOUR PLAN

Building on extensive research and input from the field, the Community Foundations Leadership Team drafted goals and supportive strategies to initiate the Centennial Plan for the Community Foundation Field, 2011-2014. The plan’s key components were presented to community foundation practitioners field-wide in the form of a survey inviting feedback. More than 320 individuals responded, largely validating the plan and guiding the CFLT to prioritize and publish it for further development and use by community foundations across the country.

Like the extraordinary milestone it commemorates, the Centennial Plan belongs to the field of community foundations. To be realized, it calls for the investment and participation of organizations large and small, rural and urban, and everywhere in between.



National Work with Local Value

Organized into four broad goals, the Centennial Plan is focused on strengthening the collaborative field of community foundations and promoting a philanthropic environment supportive of our work. It also seeks to support individual success, through community leadership and brand building efforts, as individual community foundations work to deliver local value in their communities.

1	GOAL ONE FIELD BUILDING Community foundations enhance their practice and effectiveness to remain relevant and competitive in the philanthropic marketplace and collaborate to collectively strengthen the field as a whole.
2	GOAL TWO LEGISLATIVE AND REGULATORY SUPPORT Members of Congress and other public officials understand community foundations and are supportive of them.
3	GOAL THREE COMMUNITY LEADERSHIP The community foundation is a catalyzing force that creates a better future for all by addressing the community's most critical or persistent challenges, inclusively uniting people, institutions and resources, and producing significant, widely shared and lasting results.
4	GOAL FOUR BRAND BUILDING Community foundations identify and communicate their distinctive features and community value to gain broader external recognition of who they are and what they do.

The desired result of these goals is increasing the recognition of community foundations as valued community leaders and partners.



GOAL ONE FIELD BUILDING

Community foundations enhance their practice and effectiveness to remain relevant and competitive in the philanthropic marketplace and collaborate to collectively strengthen the field as a whole.

WE WILL BUILD THE FIELD BY CONNECTING, SUPPORTING, EDUCATING AND INSPIRING.

STRATEGY A: Strengthen organizational effectiveness to promote sustainability and maintain sound operating practices. This may involve...

- Sharing best practices on effective business models (including shared back-office services), affiliation models, fiduciary responsibilities and investment strategies in a time of uncertain markets
- Championing the value of National Standards for U.S. Community Foundations
- Identifying and sharing methods to evaluate impact

STRATEGY B: Create robust and innovative approaches to capture and share knowledge. This may involve...

- Promoting and supporting the broadest participation and exchange of ideas
- Mining the knowledge that has been previously created (e.g., via CFLT Idea Lab grants)
- Participating in the development of the Council on Foundations knowledge management platform, as well as other technology services, to better serve the sector

STRATEGY C: Be nimble and respond to emerging issues, opportunities and needs of the field (e.g., IRS audits, Social Innovation Fund). This may involve...

- Identifying trends and other changes in the external environment that have implications for community foundations
- Developing activities to address those issues that are the most promising opportunities or substantial threats to the field

STRATEGY D: Promote high quality professional development for staff, trustees and volunteers. This may involve...

- Continuing and building on Center for Community Foundation Excellence courses
- Promoting more opportunities for peer-to-peer learning at national conferences and other convenings
- Providing diverse in-person and virtual opportunities to increase trustees' knowledge, skills and involvement in the work of their community foundations and the broader field
- Facilitating regional meetings and online convenings and encouraging others to do the same



GOAL TWO LEGISLATIVE AND REGULATORY SUPPORT

Members of Congress and other public officials understand community foundations and are supportive of them.

WE WILL ENSURE THAT THE NATIONAL LEGISLATIVE AND REGULATORY ENVIRONMENTS ARE SUPPORTIVE OF COMMUNITY FOUNDATIONS.

STRATEGY A: Ensure the structure and resources are in place to effectively anticipate, monitor and respond to legislative and regulatory opportunities and threats. This may involve...

- Engaging in effective and timely communications with the field about emerging legislative and regulatory issues relevant to community foundations
- Actively engaging our trustees, and other key community voices, in advancing our legislative interests through outreach and education/communications with our policymakers
- Promoting communication among community foundations about key legislative and regulatory issues
- Identifying and promoting inclusion of issues relating to community foundations into the overall Council on Foundations legislative agenda

STRATEGY B: Prepare the field for an expanded advocacy role and track progress. This may involve...

- Engaging community foundation leaders and trustees in more deliberate, active and organized communications with policymakers in ways that enhance and advance the role of community-based philanthropy
- Aggressively pursuing enhanced incentives to increase charitable giving, including but not limited to expansion of the IRA Charitable Rollover, maximizing charitable deductions, reinstating an appropriate estate tax, and supporting community-based endowments
- Supporting community foundations by cultivating relationships with key IRS and U.S. Treasury officials and through comments on proposed regulations affecting community foundations

Community foundations serve caring donors and strengthen communities—engaging leaders, supporting important initiatives and collaborating with local organizations.



GOAL THREE COMMUNITY LEADERSHIP

The community foundation is a catalyzing force that creates a better future for all by addressing the community's most critical or persistent challenges, inclusively uniting people, institutions and resources, and producing significant, widely shared and lasting results.

We will advance the capacity for community leadership throughout the field and communicate the impact.

STRATEGY A: Promote the practice and measurement of community leadership. This may involve...

- Cultivating partnerships with diverse groups to leverage collective expertise (e.g., regional associations, affinity groups and others)
- Building on previous community leadership projects by developing new ways to disseminate and use existing tools and resources
- Rolling out community leadership evaluation metrics and integrating information into a national data system

STRATEGY B: Expand and strengthen community foundations' leadership skills, including convening, consensus building, working across sectors and advocacy. This may involve...

- Providing senior community foundation leaders and trustees with opportunities to learn from each other about diverse aspects of community leadership
- Providing programming for emerging community foundation leaders and trustees to increase their understanding and skills in community leadership
- Capitalizing on existing professional development opportunities (e.g., Fall Conference for Community Foundations, webinars, Council on Foundations leader programs, Next-Gen programming, regional associations and affinity group offerings)

STRATEGY C: Communicate the impact of community leadership activities across the field. This may involve...

- Developing and implementing a communications strategy to highlight the community leadership work of community foundations
- Highlighting and broadly disseminating information on community leadership as part of communications about the distinctive features of the field



GOAL FOUR BRAND BUILDING

Community foundations identify and communicate their distinctive features and community value to gain broader external recognition of who they are and what they do.

We will be nationally and internationally known for our distinctive and vital community value.

STRATEGY A: Promote external recognition of community foundations' common value. This may involve...

- Equipping community foundations to communicate even more effectively to those within our communities
- Building upon National Standards to identify key features that define community foundations
- Identifying, reviewing and building on existing branding materials
- Engaging community foundations to incorporate the common identity in their own communications (e.g., contests/awards, conference presentations, social media, webinars, etc.)
- Creating a taskforce comprising representatives from the CFLT, Comma, Community Foundations National Standards Board and the Council on Foundations to articulate common messaging for community foundations

STRATEGY B: Use the centennial anniversary of community foundations as an opportunity to promote community foundations' distinctive value. This may involve...

- Developing an engaging and cost-effective communications plan
- Promoting use of common centennial messages by community foundations across the field

OUTCOMES OF THE CENTENNIAL PLAN ARE POSSIBLE BECAUSE OF...

- You, through your participation and contributions
- Volunteer leadership by the CFLT and individual community foundations
- Council on Foundations membership dues
- Partner organizations, including private foundations and associations

BUILDING ON PAST PERFORMANCE

Thanks to collective work in recent years, the Centennial Plan doesn't start from square one. Here are just a few accomplishments won by community foundations in pursuit of the CFLT Plan of Action, 2007-2010.

WE CREATED, CAPTURED AND SHARED KNOWLEDGE **Idea Lab** grant program supported innovative, collaborative community foundation efforts to address issues important to the field. Field-wide feedback helped finalize updated **National Standards** for U.S. Community Foundations, key elements in the **accreditation** process and the **definition** of a community foundation. **Regional Learning Forum** learning events shared Plan of Action project information and promoted peer exchanges; insights were further shared by **CF Solutions** e-publication. **CFSource** e-newsletter transmitted information from the Council, CFLT and the field to 4,000+ subscribers monthly.

WE INCREASED COMMUNITY FOUNDATION INTEREST, UNDERSTANDING AND PRACTICE OF COMMUNITY LEADERSHIP

CFLT implementation partner CFLeads developed a variety of leadership resources for community foundations, including... The **Framework for Community Leadership** by a Community Foundation, which served as a foundation for many other efforts (created in conjunction with the National Task Force on Community Leadership). Two intensive skill-building **Community Leadership Networks** (created in conjunction with Aspen Institute's Community Strategies Group) and similar but more cost-effective **Community Leadership Clusters**. New course for the Council's Center for Community Foundation Excellence: **Public Policy for Community Foundations. Webinars, case studies, Cool Tools**, and community leadership **stories**.

WE STRENGTHENED COMMUNITY FOUNDATION ORGANIZATIONAL EFFECTIVENESS Updated **National Standards** for U.S. Community Foundations, including **reconfirmation** process and **supporting organization** to administer National Standards. Updated **Technology Vendor Analysis** survey and a study specific to **smaller foundations**. CFLT implementation partner CF Insights developed a variety of organizational effectiveness resources for community foundations, including... Tools to use benchmarking data for **planning and decision making. Taking Informed Action in Challenging Times** study. The Economic Scenario Planning Model or "**stress test**" (created in conjunction with FSG – Social Impact Advisors). **Fueling Impact: A Fresh Look at Business Model Innovation and New Revenue Sources** (created in conjunction with FSG – Social Impact Advisors).

WE WORKED TOWARD LEGISLATIVE AND REGULATORY ENVIRONMENTS SUPPORTIVE OF COMMUNITY FOUNDATIONS

Assessment of **community foundation needs** to advance through advocacy. New levels of **public-philanthropic partnerships** designed to serve local communities. Information disseminated to **members of Congress** and others to promote understanding of the importance of **community-based philanthropy** in addressing community needs. Community foundation participation in **Foundations on the Hill** and **District Days**. Community foundation participation in Council-organized meetings with **key elected government officials** to discuss a key social initiative.

Front cover notes:

In 2007, there were **717** community foundations.

Estimated community foundation giving in 2008 was **4.6** billion dollars.

As of 2008, **86** percent of the U.S. population was served by community foundations.



COUNCIL *on* FOUNDATIONS

Community Foundations Leadership Team

COMMUNITY FOUNDATIONS LEADERSHIP TEAM

Terry Mazany, CFLT Chair, The Chicago Community Trust
Usha R. Balakrishnan, The Community Foundation of Johnson County
Michael L. Batchelor, The Erie Community Foundation
Brenda Chumley, Greater Kansas City Community Foundation
Martha Darling, Ann Arbor Area Community Foundation
Teri A. Hansen, Gulf Coast Community Foundation of Venice
Felecia L. Jones, Black Belt Community Foundation
Douglas F. Kridler, The Columbus Foundation
Paul Major, The Telluride Foundation
Grant Oliphant, The Pittsburgh Foundation
Monica Patten, Community Foundations of Canada
Carla Roberts, Arizona Community Foundation
Judith W. Sjostedt, Parkersburg Area Community Foundation
Sherry Risk Stark, Heritage Fund - The Community Foundation of Bartholomew County
George C. Stevens, Coastal Community Foundation of South Carolina
Nancy Straw, West Central Initiative
Nicole Taylor, East Bay Community Foundation
Gay Young, New York Community Trust

The Centennial Plan is also the work of Carleen Rhodes of the Saint Paul Foundation and Kelly Lucas of the Community Foundation of South Wood County, who have since completed their service as members of the CFLT.

COUNCIL ON FOUNDATIONS COMMUNITY FOUNDATION SERVICES STAFF

Heather Scott, Director

Kensei H. Brittain, Manager, Community Foundation Services

Diane Miller, Manager, National Standards

The CFLT recognizes the contributions of Linda Raybin, former managing director of Community Foundation Services at the Council.

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