



# CFSOURCE

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### Special Announcement

## **CFSource** Survey Coming Soon †

[CFSource](#) was launched in July 2003 by the [Community Foundations Leadership Team](#) and the [Community Foundation Services Department](#) of the [Council on Foundations](#) to provide consistent, quality news to the community foundation field and others interested in community foundations. It is delivered monthly to more than 3,000 subscribers around the world. We are constantly seeking fresh ideas to make CFSource an added value to your work. As we approach our one-year anniversary, we want to hear from you! Watch your inbox for a special survey announcement later this week.

## Community Foundations Leadership Team News

### New Standards Action Team Chair Named †

Mary Jalonick, executive director, [Dallas Foundation](#) (Dallas, TX), was recently named incoming chair of the [Standards Action Team](#) (SAT) by [Community Foundations Leadership Team](#) Chair Dennis Riggs. She begins her two-year term July 1, 2004, succeeding Jennifer Leonard, president, [Rochester Area Community Foundation](#) (Rochester, NY), who is the incoming Leadership Team chair. A lifelong Dallas resident, Mary has served as the foundation's executive director since 1987. In addition, she is a member of SAT, the [National Marketing Action Team](#) (NMAT), the R&D Incubator Committee and the faculty for the [Center for Community Foundation Excellence](#) (CCFE). She also serves on the board of the [Conference of Southwest Foundations](#) and as the organizational development and effectiveness working group coordinator for the [Transatlantic Community Foundation Network](#) (TCFN).

### Confirmation of Compliance: Reviewers Needed †

Building on the commitment of more than 400 U.S. community foundations to comply with [National Standards for U.S. Community Foundations](#), the [Standards Action Team](#) (SAT) invites experienced community foundation practitioners to become trained National Standards reviewers. SAT will select 30 applicants to review documents from community foundations seeking independent confirmation of their compliance with standards. Reviewers will receive a free and expenses-paid training workshop in Washington, DC, and \$120 for each community foundation record book reviewed. Applicants are sought who have:

- Five years of senior management experience with community foundations and an additional five years of nonprofit experience OR ten years of high-level community foundation experience across at least two functional areas (e.g., communications and resource development).
- Knowledge of community foundations of different asset sizes, staff resources, organizational longevity and geographical service areas (e.g., urban, rural, suburban).
- At least one bilingual (Spanish-English) applicant is needed.

If you (or any of your colleagues) fit this description, submit the one-page [application](#) by Friday, May 14, 2004. For more information, visit the Council's [website](#).

### Small Grants Offered for National Standards Implementation †

Thirteen regional associations of grantmakers and community foundation associations have been invited by the Council, on behalf of the [Standards Action Team](#) (SAT), to submit proposals for grant funding to participate in the next stage of implementation for [National Standards for U.S. Community Foundations](#). The small grants program offers an opportunity for regional and community foundation associations to access seed funding for state- or region-based confirmation processes that are complementary to the national confirmation system, which will be announced to the field and launched during the summer of 2004. By encouraging state- or region-based confirmation processes, SAT hopes to respond to local circumstances and needs, allow community foundations to continue to work with trusted local organizations and individuals and promote innovative thinking about this stage of National Standards implementation. For more information about the request for proposals, contact [Lynne Manrique](#), program manager, [Community Foundation Services](#).

### Complying with National Standards: Get Help, Give Help †

What you are doing in your community foundation may help others through the [Community Foundation Standards & Effective Practices Database](#), developed to assist community foundations in meeting the [National Standards for U.S. Community Foundations](#). Your practices in the following areas are sought:

- Strategic planning
- Internal control policies
- Process for selecting an auditor
- Conducting a communications audit
- Developing and implementing a communications plan, including crisis management
- Public information campaigns
- Providing technical assistance to grantseekers
- Using technology in the grant application process

If you have a process you might like to share on one of these topics or that applies to any of the 43 National Standards, email [Angela Powers](#), project consultant, [Ekstrom & Associates](#). For more information about the project, visit <http://bestpractices.cof.org> and login using your personal COF.org username and password.

### Technology Update †

The [Technology Steering Committee](#) (TSC) reports steady progress on a number of vital fronts in the [TSC 2004 Annual Report](#), released April 21, 2004.

## Hot Topic: Carson Elected to Chair Council Board †

The [Council on Foundations](#) elected five new members and re-elected ten current members to its board of directors Tuesday, April 27, 2004, during its Annual Conference in Toronto, Ontario, Canada. There are now 33 directors on the governing board of the Council. [Emmett D. Carson](#), Ph.D., president and CEO, [Minneapolis Foundation](#) (Minneapolis, MN), was elected by the board April 28 to serve a two-year term as the board's chair, effective immediately. The full press release is available on the Council's [website](#). Other community foundation representatives on the Council board include:

- John Binsted, Vice President and COO, [Vancouver Foundation](#) (Vancouver, BC, Canada)
- Nancy Jones, President, [Community Foundation of Abilene](#) (Abilene, TX)
- Kathy Merchant, President and CEO, [Greater Cincinnati Foundation](#) (Cincinnati, OH)
- Dennis Riggs, President and CEO, [Community Foundation of Louisville](#) (Louisville, KY)

## Opportunity Knocks: Annual Conference Call for Sessions †

On the heels of a successful conference in Toronto, Ontario, Canada, April 26–27, 2004, the [Council on Foundations](#) is already planning its 56th Annual Conference in San Diego, California, April 10–12, 2005. The conference will focus on building strong and ethical foundations. Conference planners seek peer-led sessions that will inform and encourage grantmakers to excel in these areas:

- the legal, regulatory and governance aspects of establishing and managing foundations and corporate giving programs, and
- the management and leadership challenges of making a positive difference in the world through grantmaking.

Session applications are due 5:00 PM EDT, July 2, 2004. For complete details, visit the Council's [website](#).

## Council Column: Register Online for Summer Institutes †

Complete program details and registration are now [online](#) for this summer's Institute for New Board Members (Sunday, July 18) and Institute for New Grantmakers (Monday–Wednesday, July 19–21) in San Francisco, California. [Register now](#) for one or both of these informative institutes and a special seminar designed for those establishing a new private foundation.

## Save the Date †

### Professional Development

- June 14–16: [Community Foundation Fundamentals](#) (Washington, DC)
- June 17–18: [Financial Administration for Community Foundations](#) (Washington, DC)
- July 18: Institute for New Board Members (San Francisco, CA)
- July 19: Special Seminar: Establishing a New Foundation (San Francisco, CA)
- July 19–21: Institute for New Grantmakers (San Francisco, CA)
- July 22–23: [Resource Development for Community Foundations](#) (Washington, DC)
- October 7–9: [Community Foundation Fundamentals](#) (Twin Cities, MN)
- October 10–13: 20th Fall Conference for Community Foundations & Pre-conference Events (Twin Cities, MN)

### Events & Reminders

- May 13–15: [Community Foundations of Canada 2004 National Conference](#) (Québec City, Québec, Canada)

## Executive Transitions †

The [Council on Foundations](#) and the [Community Foundations Leadership Team](#) are pleased to congratulate the following executives on their new posts:

- Kathi Horton, President, [Community Foundation of Greater Flint](#) (Flint, MI)
- Dianna Sutton, President and CEO, Community Foundation of the Florida Keys (Key West, FL)

Please send notices of staff changes at your community foundation to [Bill Walker](#) (202/467-0454) to ensure your membership records are current.

Center for Effective Philanthropy Examines Grantee Perceptions †  
A new report from the [Center for Effective Philanthropy](#) (CEP) draws on a survey of thousands of grantees of 30 large private and community foundations to describe the key dimensions that nonprofits value in their foundation funders. The report offers the first large-scale and systematic analysis of grantee perceptions of foundations and debunks a number of myths concerning the relationship between grantees and foundations. Since early 2003, CEP has surveyed more than 16,000 grantees of 87 foundations, receiving more than 9,000 responses. [Listening to Grantees: What Nonprofits Value in their Foundation Funders](#) analyzes results from the Center's spring 2003 survey round, in which more than 6,000 grantees of 30 foundations were surveyed and nearly 3,200 completed responses were received.

## Aspen Institute Awards Grants of \$225,000 to Study Community Foundations †

The [Nonprofit Sector Research Fund](#) (NSRF) of the [Aspen Institute](#) recently awarded grants totaling \$225,000 to three research projects under NSRF's Community Foundation Initiative. They are:

- **Together is Better: Regional Alliances and Small Community Foundation Sustainability:** Robert Collier, [Council of Michigan Foundations](#), and Lucy Bernholz, [Blueprint Research & Design](#) (\$85,000)

This research will examine regional collaborations among geographically adjacent community foundations with less than \$20 million in assets. The study seeks to determine the effects of collaborations on the operational, marketing and financial sustainability of participating foundations.

- **Understanding the Decision-Making Behavior of Community Foundation Boards:** Judith Miller-Millesen, [Ohio University](#), and Sandra Hughes, [BoardSource](#) (\$85,000)

The goal of this project is to develop a research-based, empirical understanding of how community foundation boards balance their complex—and often competing—roles as grantors, grantees, community representatives and providers of fiduciary oversight. The research is designed to provide detailed information about the activities performed by community foundation boards, leading to improved skills training and development programs for community foundation board members.

- **Organizational Excellence and Sustainability in Community Foundations:** Francie Ostrower, [Urban Institute](#) (\$55,000)

This study is designed to understand what practices, organizational models and collaborations are being used by community foundations to achieve organizational excellence and to determine how well these efforts are working. The project will also determine how "organizational excellence" is defined by staff and board of participating community foundations.

Sydney Community Foundation Formed †  
The Sydney Community Foundation (SCF) recently was formed through a collaboration of four founding members—[Philanthropy Australia](#), [Charities Aid Foundation \(CAF\) Australia](#), [United Way Sydney](#) and Ms. Heather Kent. This steering committee spent a year working together to consult in the community, establish the necessary legal and regulatory structures and conduct a feasibility study and donor research. Seed funding for the foundation was provided by the [Myer Foundation](#) and the [NSW Premiers Department](#). At the official launch March 24, two grants were made to community groups that operate in Sydney, made possible by a grant from [CAF United Kingdom](#). SCF's mission is to enrich the life of Sydney with a lasting investment of people, knowledge and giving. For more information, contact [Heather Kent](#), Executive Officer, Sydney Community Foundation.

Chicago Community Trust Funds Youth-Related Programming †  
Chicago's award-winning [Chicago Matters](#) series continues its yearlong focus on young people ages 11 through 22 with premieres of new programming from [Chicago Public Radio](#), [The Chicago Reporter](#) and the [Chicago Public Library](#). [Chicago Matters: Our Next Generation](#) officially launched in February and continues throughout 2004. Established by the [Chicago Community Trust](#) (Chicago, IL) in 1990 to illuminate matters of vital interest to Chicago-area communities, [Chicago Matters](#) is the nation's longest-running multimedia public affairs series. Previous series have focused on housing, the environment, children-at-risk, race, aging, violence, immigration, religion, work, health, justice and education. For more information, visit the [Chicago Matters website](#).

#### Other Headlines †

Ever wonder what publications like [The New York Times](#), [The Wall Street Journal](#) or [Money Magazine](#) are saying about the foundation world? As a member of the Council on Foundations you can receive Breaking News—a free email with the day's top articles covering the philanthropy sector. Foundation staff, board members and trustees can subscribe to Breaking News by sending an email to [media@cof.org](mailto:media@cof.org). Please include your name, title, foundation name and contact information. Below are some of the news items you might see featured in Breaking News:

- [Charities Surprise Donor Foundations with Bluntness](#) ([The New York Times](#): April 23, 2004)
- [Community Foundation Sees Growing Trend in Market-Proof Gift Giving](#) ([Birmingham Business Journal](#): April 12, 2004)
- [Giving by Affluent is Less Generous on Basis of Assets](#) ([The Wall Street Journal](#): April 22, 2004 ) Paid subscription required.

## About **CFSource**

[CFSource](#) is published by the [Council on Foundations](#) and the [Community Foundations Leadership Team](#). CFSource consolidates a wide variety of information for community foundations into a single, electronic communication.

CFSource editors welcome your feedback. Please send your comments, suggestions, news and story ideas to [CFSource](#).

CFSource is distributed via e-mail by the [Community Foundation Services Department](#) of the Council on an opt-out basis. You may subscribe or unsubscribe by writing to [CFSource](#).

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