

Community Foundation Fundamentals

New community foundations staff and board members often find the most difficult challenge is understanding precisely what a community foundation is.

Community Foundation Fundamentals is designed to help staff and volunteers quickly comprehend organizational essentials. The three-day course covers topics including:

- history of the community foundation movement
- basic information on governance, resource development and donor relations
- key legal and legislative issues information on grantmaking
- community leadership and fiduciary responsibilities

Through this course, participants gain new professional contacts and valuable resources as well as expert training from experienced leaders in the community foundation field.

Community Foundation Fundamentals is targeted for people in the early stages of their careers, as well as more experienced staff who have not had community foundation training and would like a review. Applicable to volunteers and staff at community foundations of all sizes, some comments from previous course participants offer insights:

- *Coming in, I had a rough idea of what the tasks were, but I didn't know what I didn't know. I didn't know even what to ask.*
- *A great overview of a complex field—it's always wonderful to spend time with colleagues and learn from their experiences.*
- *As a rookie you provided the momentum I needed to get this foundation off the ground.*
- *I am the first professional staff. I was pleased to learn that all in all we're not doing too badly relative to that which the field defines as standard.*
- *This filled in the gaps as to the workings of the rest*

ACKNOWLEDGEMENT

The Center for Community Foundation Excellence courses Community Foundation Fundamentals, Resource Development for Community Foundations, Financial Administration for Community Foundations were developed in conjunction with Indiana University's Center on Philanthropy. Marketing for Community Foundations was created by Williams Group in partnership with Michigan Community Foundation Ventures.

Course Agenda

Day One

- 8:30 a.m. **Introduction and Course Overview**
- 9:45 a.m. **Break**
- 10:00 a.m. **History of the Community Foundation Movement**
This session offers an overview of the rich history of the community foundation movement. Learn about the start of community foundations and their evolving roles.
- 10:30 a.m. **National Standards and Community Foundations Today**
Gain an understanding of the common and disparate characteristics of the field, the unique role that the field plays in philanthropy and how the National Standards for U.S. Community Foundations undergird the development of the field.
- 11:00 a.m. **Governance Issues**
This session will increase your understanding of the laws affecting community foundations. From critical legislation and regulations, to examples of governing structures and board responsibilities, this session will provide you with important knowledge on the underpinnings of your organization that relate to the National Standards for U.S. Community Foundations.
- 12:00 p.m. **Lunch**
- 1:15 p.m. **Governance Issues** (continued)
- 3:15 p.m. **Break**
- 3:30 p.m. **Resource Development**
Asset development and donor relations are a large part of the daily business of a community foundation. When considering what motivates a donor, it helps to understand how the foundation is uniquely positioned to assist donors in fulfilling their philanthropic goals. In this first of three sessions on resource development, you will learn about different types of potential donors and the many options community foundations can offer.
- 4:15 p.m. **Wrap-up, Questions and Answers**

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- 4:30 p.m. **Site Visit**
When possible, a site visit to a local community foundation will be arranged. The visit will allow participants to tour the facility, see their systems, meet staff and learn about their challenges and lessons learned.
- TBD **Dinner (optional)**
Enjoy a night out as you gather with your colleagues to continue your peer learning over dinner. Staff will provide restaurant recommendations and directions to a variety of restaurants (self-pay).

Day Two

- 8:30 a.m. **Resource Development and Donor Relations**
There are several characteristics that make community foundations unique and give them the ability to serve donors. This session provides an overview of the many ways for donors to contribute—directly and through planned giving. It will also address marketing and communications issues and the responsibilities and services to donors.
- 9:45 a.m. **Break**
- 10:00 a.m. **Resource Development and Donor Relations (continued)**
- 12:15 p.m. **Lunch**
- 1:15 p.m. **Grantmaking and Community Leadership**
This session offers an overview of the grantmaking process from developing grantmaking priorities to program monitoring. Gain insight into the different approaches to grantmaking and the different roles community foundations play in community leadership.
- 2:45 p.m. **Legal and Legislative Issues**
An attorney will discuss issues critical to community foundations, including the public support test, variance power, material restrictions rules and current and upcoming legislation.
- 4:45 p.m. **Wrap-up, Questions and Answers**

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5:00 p.m.	Adjourn
TBD	Dinner (optional) Enjoy a night out as you gather with your colleagues to continue your peer learning over dinner. Staff will provide restaurant recommendations and directions to a variety of restaurants (self-pay).

Day Three

8:30 a.m.	Stewardship, Accountability and Fiduciary Responsibilities This session covers the best practices in foundation accountability. See examples of how records and standards relate to good stewardship practices. Gain an understanding of the implications of investment, spending policies and the budgeting process.
10:15 a.m.	Break
10:30 a.m.	Stewardship, Accountability and Fiduciary Responsibilities (continued)
12:00 p.m.	Lunch
1:00 p.m.	Grantmaking, Part 2: Community Leadership Learn about the leveraging activities involved in community leadership—one of a community foundation's most important added values.
2:30 p.m.	Wrap-up
2:45 p.m.	Adjourn

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