

Community Foundation Executive Roundtable *(Abridged Notes and Key Takeaways)*
Council on Foundations | 6.18.19 | Seattle Foundation

I. FRAME FOR THE DAY: INNOVATIONS *proposed by Seattle Foundation*

- Changing the Narrative
- Centering Equity
- Scaling Philanthropy
- Cross-Sector Table and Regional Dashboard

II. BIG ASPIRATIONS / CHALLENGES TO OUR PRECONVEIVED NOTIONS:

- Assume most, including own org staff and board, are aware of how the systems are or aren't functioning to support people in our community.
 - We assume community and civic leaders and nonprofit leaders and engaged donors engrained in community affairs are aware of how bad it is for some, but that is not always the case. Is more Broad educational awareness needed in the community?
- Leading, following or partnering with our donors?
- Is all philanthropy good?
 - When we think about poverty, in US our empathy suggests "those poor people" versus the rest of the world sees its poverty around them and says "that could be me if...". They can better relate than we attempt to do in the US.
- Changes happening in the community around demographics, power shifts, wealth and opportunity - how to speed up the change of power dynamics and shared ownership of community?
- Discourse around DAFs - resist or reform?
- Why are CFs still relevant and who are we relevant for? Are we relevant in a sustainable way? Who pays for the work that is required in convening and engaging?
- IF WE were to design an organization with the mission of a CF from the ground up, what would the institution look like? How does it differ from our current structure, form and strategies?
- A good reputation is social capital—What is purpose of a good reputation if not willing to risk it?
- Radically re-inventing ourselves— how much of our organizational energy is spent on administering assets versus investing the energy on creating change?
- Assets under influence, not just under management?
- How do we create a platform in which people invest in us and our work in community, not just invest through us?
- If we are not best at something, why are we not investing in letting someone else manage that aspect of the business to focus our energy where we can be best — local community philanthropy endeavors?
- "We are still operating on a bus when we need a race car" - that is to say 100 years ago we were designed on a small bank model. That is no longer competitive or efficient

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III. BROAD REFLECTIONS FROM THE DAY:

- Defining community - (Changing the narrative)
 - Soft and general awareness of the CF, but no concrete understanding of how they have improved or created betterment of the community.
- What does it mean to actually be known as a civic leader, convener?
 - Broad stakeholders and diverse perspectives
- If not careful, can become distinctly separate from the people you intend to serve and support.
- Access to Capital - breaking open and fostering new financial systems to engage in solution-making. How do we lock into deeper use of the endowment beyond just grant making dollars?
- What was true 25 years ago is still true today - we were built on the premise of being a charitable trust and that still rings true today.
- Growth was driving some of the conversation. Asset size has nothing to do with who we are and need to be today. Even as the largest CF in the world, Silicon Valley still struggles with the same challenges with which other CFs struggle.
- In a worse position as CFs than we were today 25 years ago because commercials / nationals have stepped into the role of more efficient traditional philanthropic bank. Losing the game of competing in the traditional philanthropic bank space.
- No new investment being spurred around technology driven solutions of connecting donors with local projects and nonprofits; not brokering philanthropic deals in the digital age.
- Others are defining CFs for us. What is our relevance and how do we define it for ourselves — ?
- Amassing assets and absent in leading at a community level. Don't have operating capacity to actually do that. From the biggest to the smallest CF, this is an urgent matter.
- The value proposition says nothing about being the best in fund management and investment resources, not the best in donor platforms for technologies to lead grant making or donor engagement. However, it is where we spend much of our institutional energies.
- Is it about elevate voicing, lifting up others, brokering relationships and deploying new capital? Or this is just wishful thinking and marketing endeavors?

CF roles *(as defined by Seattle Foundation):*

1. *Traditional philanthropic bank*
 - Mostly self-directed donors
2. *General Supporter*
 - Support varied issues
3. *Intentional Convener*
 - Bring groups together on specific issues but not always public
4. *Civic Leader and Catalyst*
 - Lead prominently and effectively on specific issues

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IV. Common Themes (related to Roundtable Series):

1. What does it mean to be a community foundation today?

- a. What is the relevance of who we are and who we want to be?
- b. How do we honor the local impact work while still fulfilling our mission?
 - i. “Strong more vital community for all”
- c. Different roles in the improvement of social impact and solving big systemic problems are being done by various types of community foundation
 - i. Some with intentional local work and other work for a system change.
- d. Value orientated – cross functional sector partnerships
- e. CFs are the Swiss army knife – be the trusted go to tool for community
 - i. Will admin fees for assets under mgmt. continue to sustain this model/work?

2. Finding a better measure of success to achieve the real questions.

- a. Moved away from using asset size as a KPI
- b. Involving the voices/feedback of the people we serve as our KPI (be aware who those people are)
- c. Show results – help to ensure our race, incomes, zip codes from our communities don’t determine our success

3. Improving the existing infrastructure

- a. Expectation money will fix everything without having solution.
 - i. It’s not about how much money we have, it’s about what are we doing with the money.
- b. Some organizations do not have the infrastructure to receive large amount of money.
- c. Assumption of awareness of broken systems and situation in our communities.
 - i. Do we understand the major source of turbulence affecting us now?

4. Role of accountability for our community

- a. Being ready to shift and take the position to be equitable in our work.
 - i. Finding a system of self-regulation for DAFs since we understand and are affected the most by DAFs.

5. Stronger language

- a. Define equity
 - i. *One definition:* A just society where everyone can achieve their full potential.
- b. Critical to recognize *that there has never been an equitable society, community, country, or culture.*
 - i. We are trying to build something that has never existed before. This means we shouldn’t look nostalgically backwards for solutions; it also means we should have some humility about the endeavor.
 - ii. As an important addendum, though, don’t get stuck on the definition.
 - iii. Often equity is more about how we work and the methods leaders should be applying with internal operations and external impact, so focus on the outcomes and what will bring people along.
- c. Consistent language for the whole sector

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- i. When going to our local Representative, etc. using consistent language to make a strong argument.
 - ii. Consistent language will help unite the sector.
- d. Improve language around DAFs
 - i. Coming away from banks
 - ii. True stories of what's happening and happened through DAFs

V. Takeaways:

Reflections of the day and what's next:

1. What matters?
 - a. Connecting with other fields – finance, tech, etc. – to revolutionize offerings/tools
 - b. Government most influential in all we care about - public policy, and advocacy, is a critical tool to help communities
 - c. Data and Showing results matter
 - d. Our model does matter in how we pay for this
2. Community Foundations Now
 - a. Vital signs for the US
 - b. Continue to struggle with how we describe ourselves
 - c. Acknowledging the staffing limitations to execute
 - d. Defining the governance role in all of this work
 - e. Learning from the experience of large CFs that assets under management is not what sets you free to focus on impact
3. How to improve Community Foundation sector
 - a. Improving success measures - Community Indicators by Knight Foundation
 - b. Disseminate what is happening on CA DAF legislation, other firms, etc.
 - c. Philanthropy owned enterprises/donor platform
 - d. Supporting transformative financial tools and local offerings for social impact
 - e. Convening trustees and board chairs supporting governing board to stay engaged.

Keep and/or Add for future Roundtables:

1. Keep: Including all type of community foundations (rural/urban, big/small)
2. Keep: Space to share experience, to show we are all grappling with the same challenge
3. Add: How to share our story more effectively (marketing/comms)
4. Add: Consider implications on board governance – role of boards/beyond our staff
5. Add: Additional training for boards – use boards more effectively
6. Add: Community indicators projects (Knight Foundation)
7. Add: local partners and regional leaders

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Requests for the Council:

1. Leading the sector
 - a. Connect with strong partnerships to leverage strengths
 - b. Have conversations to take leadership for the field – be our voice
 - c. On-going reality check for the council
2. Tools for the sector
 - a. Communication/Marketing:
 - i. COF Resource: Role disseminating conversations of what’s transpiring in the different states.
 - ii. Training: Helping us build the best language and marketing/communications tools – what are the branding projects we are all building?
 - b. Equity
 - i. COF Resource: Defining equity. Defining where people are on the journey of equity (DEI? Equity? Racial Equity?)
 - ii. Training: How to have conversations with staff, leadership, board members, etc. about incorporating equity?
 - c. Governance
 - i. COF Resource: helping provide resources for role of board, being effective, working across sectors, recruitment of members, advocating, etc.
 - ii. Trainings: Board trainings, convening with CEOs and board chairs and trustees, etc.

Resources referred to in workshop

1. **Changing the Narrative**
 - a. [Community Foundation Business Model Disruption in the 21st Century paper and discussion guide](#)
 - b. [“Color of Law” by Richard Rothstein](#)
 - c. [Google Housing Crisis Commitment Announcement](#)
 - d. [“Our Towns” by James and Deborah Fallows](#)
 - e. [“Who Do We Choose To Be?” by Margaret Wheatley](#)
 - f. [No Time for Complacency: Preparing Foundations for a More Turbulent Future](#) *In this report, research faculty at the Wharton School of the University of Pennsylvania and the John S. and James L. Knight Foundation.*
2. **Scaling Philanthropy**
 - a. [Opportunity Zones](#)

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- b. [Four Pathways to Greater Giving](#) – *The Bridgespan Group, with support from the Bill & Melinda Gates Foundation*

3. Centering Equity

- a. [The Curb Cut Effect by Angela Glover Blackwell – Stanford Social Innovation Reviews](#)
- b. [Targeted Universalism: Policy and Practice by John A. Powell, Stephen Menendian, Wendy Ake](#)
- c. [“Greater Seattle punches below its weight in philanthropy” by Tony Mestres](#)
- d. [Inclusive Economic Prosperity at COF](#)
- e. [Protest DEI at COF](#)
- f. For questions or support, contact [Ruth Latoison Ifill](#), Vice President, Culture, Talent, & Equity at COF

4. Cross-Sector Table and Regional Dashboard

- a. [Silver Tsunami Research](#)
- b. [Scaling Partners with Mike Green](#)

5. DAFs and Transparency

- a. [Policy and Advocacy Toolkit for Community Foundation](#), contact Bryan Del Rosario or govt@cof.org
- b. [National Philanthropic Trust’s Annual DAF Report](#)
- c. For questions or support, contact [Suzanne Friday](#), Managing Director, National Standards, And Vice President Of Legal Affairs or legal@cof.org

6. Valuable Subscriptions from COF

- a. Washington Snapshot
- b. Community Philanthropy Update
- c. This Week at the Council

To subscribe log into your [COF account](#) to edit preference, or contact membership@cof.org

7. Additional sector resources

- a. [CFLeads resources](#) - Report coming out Q1 for the sector

8. Workshop: “How to talk to your kids about race in America” – Mike Green Scale Up Partners

- a. Contact Mike Green, Scale-Up Partners (mike@scaleuppartners.com)

9. Inclusive Economic Prosperity Resources

- i. <https://www.cof.org/content/inclusive-economic-prosperity-resources>
- ii. <https://www.cof.org/content/inclusive-economic-prosperity-midwest-resources>

10. Software solutions for CFs – IT review and analysis report (request for Brad Ward for digital copy)

11. Council’s Grantmakers Policy on Hate and [COF Grantmaking Policies](#)

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- a. <http://www.d5coalition.org/wp-content/uploads/2013/07/BuildingAbetterFoundation.pdf>

12. COFs staff – for questions or help on range of issues

- a. [Ruth Latoison Ifill](#) – VP of culture, talent, equity,
- b. [Suzanne Friday](#) – VP of Legal Affairs and National Standards
- c. [Bryan Del Rosario](#) – Legal Counsel