Community Foundation Executive Roundtable

March 28, 2019 | Community Foundation of Southern Arizona

5049 E Broadway Blvd | Tucson, AZ 85711

Located on northwest side of intersection at Broadway and Rosemont, behind New World Plaza and near Williams Center. Click here for directions.

Self-Parking on-site | Enter main entrance – Directions to meeting room found in Lobby

Morning Session

9:00 – 9:30 Networking Breakfast

9:30 – 9:45 Welcome

Clint Mabie, Community Foundation for Southern Arizona
Randy Royster, Albuquerque Community Foundation and Council Board Member

9:45 – 10:00 Introductions, review agenda, attendees’ one-word check-in:
Brad Ward, Council on Foundations

10:00 – 10:40 What is keeping Executives up at night? | How can the Council on Foundations optimally and concretely help to move the field forward?
Listening Session: Council

10:40 – 11:00 Networking Break

11:00 – 11:15 Why we convened this session: Brad

1. To discuss the collective aspirations, culture and identity of Community Foundations as a field in 21st Century
2. To glean how the Council can optimally help Community Foundations strengthen the competitive edge of the field

11:15 – 11:45 Reflections on DC Executive Roundtable: Our collective calling as Community Foundations: Kedren Crosby | Response and Revising by the Attendees

11:45 – 12:00 Resource Partners in the Room:

1. Dan Templin, Board Member CEO Net
2. Diana Anderson, Board Chair National Standards
3. Chantal Forster, Executive Director, Technology Affinity Group (tagTech.org)
4. Poney Carpenter, Philanthropy.io, Data/Technology Consultation
5. Robin Ferriby, Council Policy Advisor

12:00 – 12:45 Networking Lunch (w/Resource Partners)

12:45 – 1:00 Break and Regroup prior Afternoon Session
**Afternoon Session**

1:00 – 3:00  **Big Question(s) for the Field**—Eliciting Discussion and Listening Session  
*Brad and Council Staff*

1. **Suzanne Friday, Vice President of Legal Affairs and Managing Director, National Standards**  
   *Legal, Tax Policy, Regulations, Standards*  
   a. Top Legislative Issues Impacting Community Foundations—Universal Deduction, Post-Graduate Scholarships, UBIT?  
   b. DAFs and Commercial Funds—Eroding a mission-driven, place-based approach for local generosity OR just real market pressures to manage?

2. **Stephanie Powers, Vice President for Policy and Partnerships**  
   *Public Policy, Federal and National Partnerships*  
   a. CFs Competitive Edge in Leading Social Change—How is our work evolving in the community, expectations and core competencies shifting?

3. **Russ Barratt, Vice President of Technology**  
   *IT, Systems and Data Change, Software Management and National Partners*  
   a. The Shifting Landscape of Technology—What is happening in the land of software management systems (like FIMS) and how do you remain competitive with managing your data?

3:15 – 4:00  **What we heard and captured | What we miss? | How can the Council on Foundations optimally and concretely help to move the field forward? | Recap and next steps:**  
*Allison Rafti, Director, Membership and Marketing and Brad*

4:00 – 4:30  **Livestream** on today’s Executive Roundtable  
*Allison*

4:00 – 5:00  **Networking Reception**  
*Courtyard & Lobby Area*

**LIVESTREAM:**


Roundtables were made possible by the support of Knight Foundation and Council on Foundations as well as the support and contributions of our host foundations.