

Community Foundations
LEADERSHIP MULTIPLIED

2007 REPORT TO THE FIELD



COUNCIL *on* **FOUNDATIONS**

Community Foundations Leadership Team



Many lawmakers, charitable individuals and local leaders understand the difference that philanthropy can make through the visibility and impact of community foundations.

*You are the public face
of philanthropy.*

Community foundations have an opportunity to share innovative best practices at every level, learn new skills, and network with like-minded leaders to advance the common good.

Steve Gunderson
President and CEO
Council on Foundations



Acting as a unified field

A single community foundation can do an extraordinary amount of good. New Mexico Community Foundation is attracting national investment in key regional issues. Ann Arbor Area Community Foundation is engaging youth in volunteerism and community leadership.

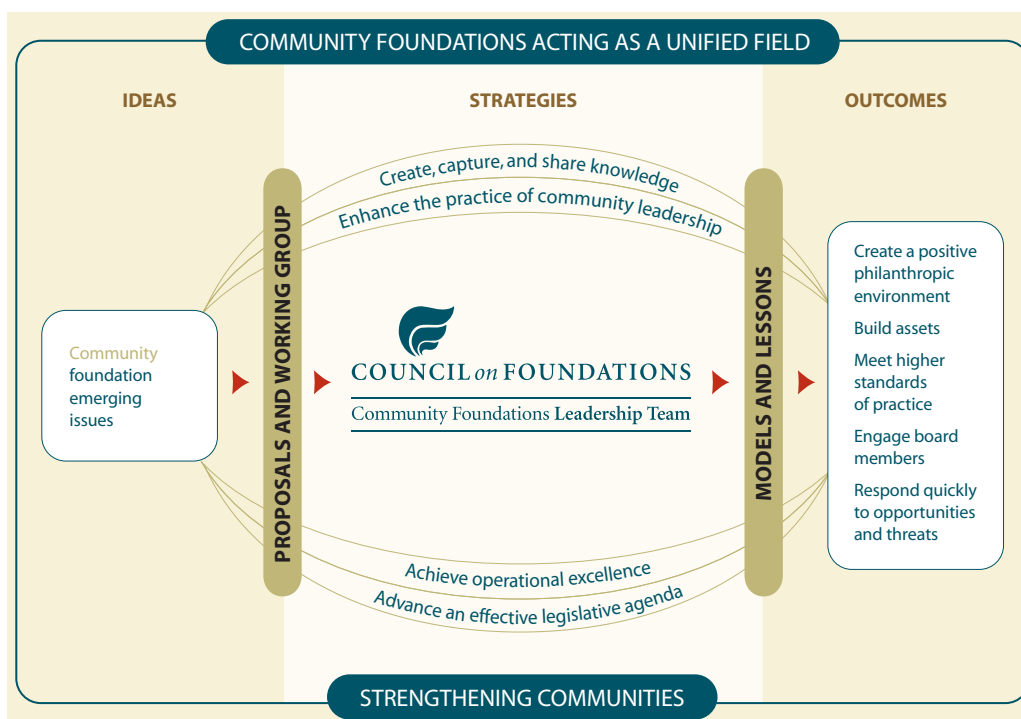
The Community Foundations Leadership Team vision is that community foundations are recognized leaders and partners in strengthening their communities. We seek to *multiply* our impact, helping us attain our full, collective potential for the communities and the country we serve. I would like to thank members of the Leadership Team who completed their service this past June. Their contributions have provided the new team a strong foundation for success.

In our new Plan of Action, the Leadership Team builds on past achievements, draws on insights about the changing philanthropic landscape documented in the report *On the Brink of New Promise*, and responds to the clear, specific direction provided in our 2006 survey of the community foundation field. Findings have led the Leadership Team to retool the way we lead and serve. The new field engagement model illustrated below, capitalizes on the vast diversity and valuable knowledge in community foundations. Rather than act by consensus, we will advance a field agenda by fueling innovations among working groups that share geographic or issue-based interests. Field advancement relies upon our ability to identify emerging issues and multiply successes.

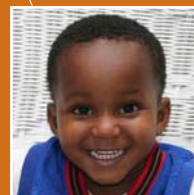
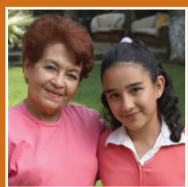
This *Report to the Field* provides context and action steps supporting four goals: an effective legislative agenda, enhanced community leadership, operational excellence, and increased knowledge sharing. As strategies take shape and funds are raised, we invite you to factor in.



Darcy S. Oman
Chair, Community Foundations Leadership Team
President and CEO, The Community Foundation Serving Richmond and Central Virginia



A New Era



People of every means have an opportunity to create and receive social good through their local community foundations.

While community philanthropy is available in multiple forms, no other organizations are as aptly called the public face of philanthropy. Nationwide, community foundations are rising to new levels of performance in response to what On the Brink of New Promise labels a new era in community giving.

GROWING IN SIZE, SERVICE, AND SCRUTINY

In coming decades, community foundations aspire to translate a sizeable portion of the \$41 trillion transfer of wealth into community capital. To secure and steward these resources, we must also grow in our service to the common good. Community foundations continue to expand beyond the realm of donor service and grant management to embrace new levels of leadership. We are engaging government, business, and private sector partners in fruitful cross-sector collaboration. With our willingness to lead change comes an understandable increase in scrutiny by policymakers and the media. Our ability to self-regulate and earn public trust is, therefore, mission-critical.

REDEFINING THE METRICS OF SUCCESS

No longer can we define success by counting gifts, assets, and grant dollars. Today, community members, donors, and legislators are seeking a greater understanding of how community foundations make a difference. We must demonstrate our value using new ways to measure lives touched, nonprofits supported, and communities improved—and assess our collective impact in substantive ways.

ACTING ON OUR DISTINCTIVE VALUE

Our long-term relevance and viability depend on the distinct value we deliver: community leadership, personalized philanthropic services, and our local expertise.

To sustain and grow, we must continue to develop our unique offering of expertise and impact.

For an individual community foundation, this is a tall order—but we can learn from one another and utilize new tools and models from within and beyond our field. The Community Foundations Leadership Team's Plan of Action creates a platform to help community foundations engage in cutting edge initiatives, grow in our understanding and practice of community leadership, continue to increase our operational excellence, and share our varied knowledge and experiences.

Together, we can create even greater results and impact.

Value Voice

The rapidly changing legal and regulatory environment is one of the greatest reasons for community foundations to organize, speak, and act as a field. Only by understanding the issues and leveraging our collective strength can we cultivate an environment that promotes community philanthropy and protects our field.

Amid increasing scrutiny of our sector, community foundations have demonstrated a willingness and ability to self-regulate through National Standards for U.S. Community Foundations.

We need to be even more active in setting a legislative agenda. Community foundations—together with the Council on Foundations and other associations—are playing an essential role in advocating for legislative provisions that make it possible for donors to give IRA assets to donor-advised funds. We also are working actively to protect donor-advised funds and supporting organizations from other restrictive legislation and regulations.

Community foundations, in partnership with the Council's Government Relations team, have helped convince Congress to establish the Congressional Philanthropy Caucus that will keep senators, representatives, and their staffs informed about foundations and the many important roles we play.

We have a track record of creating value, stewarding community resources, and serving people. Too often, we fly under the radar screens of lawmakers—but our stories are worth telling and our interests worth defending.



We have a responsibility—to each other, our donors, and our communities—to protect and enhance the legislative and regulatory context that allows us to best serve communities.

DOUGLAS KRIDLER
Chair, Legal and Regulatory Action Team



Together, we can ensure legislative and regulatory environments are supportive of community foundations.

GOAL *Advance an effective legislative agenda*

Ways your community foundation can factor in

Get to know your members of Congress by participating in Foundations on the Hill, District Days, and hometown visits. Understand issues of mutual interest, promote the value of community foundations as problem solvers with the important role of building local philanthropic capital, and share concerns about limiting our potential for doing good.

Visit www.cof.org/policy

Engage trustees in public policy issues. As community leaders, informed board members can contribute to a positive local, regional, and national philanthropic environment. Politically experienced trustees can lead strategic board discussions, guide key decisions, and open the door for others to engage. Some trustees may already be working with government staff and elected officials; they can represent the interests of community and philanthropy through advocacy, collaboration, and involvement.

Get the latest news from Washington, D.C., and connect with philanthropy's policy activists by registering for the Council on Foundations Legislative Network (LegNet), a group committed to educating government officials about the value of organized philanthropy. LegNet members receive weekly email updates when Congress is in session.

Register at www.cof.org/policy

Take action on hot policy issues that impact the field. Register for action alerts from the Policy Action Center. Current calls to action include urging your representatives to join the new Congressional Philanthropy Caucus and asking them to co-sponsor the Public Good IRA Rollover Act of 2007 to expand and extend the IRA giving incentive.

Register at www.cof.org/policy

Inform the Community Foundations Legal and Regulatory Action Team about issues that matter to you so the team can accurately voice community foundation interests as resources are allocated to advocacy.

Contact us at community@cof.org

Proof Positive

In 2007, a record number of foundation trustees, executives and staff traveled to Washington, D.C., to articulate the philanthropic interests of 44 states and the District of Columbia by meeting with 80 U.S. senators and 250 representatives on Capitol Hill. Community foundations represent the largest constituency participating regularly in Foundations on the Hill.

Direction × Discovery



Community foundations never have the most money. But we have some money—and we have leadership expertise that we can bring to bear on issues in our communities.

GAY YOUNG

Co-chair, Field Engagement Action Team



Neutrality isn't our only value proposition. We are compelled to learn deeply about critical issues facing our communities, have a point of view, and provide tools to create change.

BRIAN BYRNES

Co-chair, Field Engagement Action Team



Across the country, community foundations are taking a hard look at what makes us high-value resources in our local communities amid a host of other giving options. Many conclude that community leadership is both the differentiator and an imperative that calls community foundations to practice a transformational rather than transactional form of philanthropy. Many want to be more than great grantmakers. Community foundation leaders interviewed as part of the 2006 survey of the field strongly supported community leadership as a priority in the Plan of Action.

This shared conclusion marks the beginning of a new strategy for leadership. Now is the time for community foundations to engage in leadership in its many facets: convening, facilitating, catalyzing, challenging, investing, and mobilizing.

Still, questions abound. If community foundations engage in community leadership, what are the acceptable issues and risks? What does leadership look like from one community to the next? Is time more important than money? What skills do we need? How can community foundations weave solutions from the fabric of many sectors—within and beyond geographic boundaries? How can we make the solutions last?

As we work together, answers to these questions will surface in the offices and board rooms of individual community foundations. The Community Foundations Leadership Team will create a number of forums and opportunities to support this process of collaboration, strategy, and discovery.

Field engagement and project collaborations can build interest, understanding, and the practice of community leadership.

GOAL *Enhance the practice of community leadership*

Ways your community foundation can factor in

Apply to join a Community Leadership Network, two- to four-person teams from 10 to 15 community foundations working together on real community issues in real time.

Visit www.cof.org/leadershipteam

Access the field's leadership knowledge through your professional relationships with colleagues who share geographic- or issue-based interests and in publications, such as white papers published by CFLeads.

Visit www.cfleads.org

Share an innovative leadership strategy from your community foundation or current partnerships. People want to learn from your experiences today. As the Leadership Team moves forward, we hope to secure funding that fuels pilot projects and networking to support the spread of lessons these projects generate.

Contact us at community@cof.org

In 2008, watch for more information on the national framework for community leadership and identify your community foundation's path to engage.

Register for Community Leadership for Community Foundations, a professional development course for your staff, board members, and volunteers, offered by the Council's Center for Community Foundation Excellence.

Register at www.cof.org/ccfe

Proof Positive

New Mexico Community Foundation is stimulating new investment and broad participation in vital issues that matter to New Mexicans. It builds resources and makes grants that pursue equity, provide opportunity, promote culture, and protect the environment. The community foundation works with leaders in local communities to identify key issues, develop an effective case for support, and leverage local private and public funding with grant dollars attracted from major national and international funders. New Mexico Community Foundation also manages a variety of innovative programs across the state, including an initiative that eases transitions in early childhood, and another that enhances the middle school experience with integrated services for extended-day learning, school-based healthcare, and family support.

ADDED ADVANTAGE

CFLeads www.cfleads.org

The Community Foundations Leadership Team is partnering with **CFLeads** to help community foundations link, learn, and leverage for stronger leadership. Formerly the Coalition of Community Foundations for Youth, CFLeads connects community foundations to their peers and other sources of knowledge and expertise as they take on crucial leadership roles to build thriving communities.

Performance Practice

More than 550 community foundations have agreed to comply with National Standards for U.S. Community Foundations; more than 350 are in compliance and many more are in the process. This accomplishment is a significant, proactive response to a philanthropic environment affected increasingly by technology, competition for donors, and political and media scrutiny.

Community foundations place a high importance on integrity and performance. In the 2006 field survey, CEOs widely agreed that the Community Foundations Leadership Team has invested wisely to improve marketing, operational efficiencies, and accountability, in addition to enhancing professional development.

Community foundations have developed a noteworthy complement of resources to optimize the ways we do business. The National Marketing Action Team, in collaboration with the Community Foundations R&D Incubator, developed more than 140 marketing tools to increase our visibility and build relationships with high net worth individuals and their professional advisors. These strategic tools, along with other resources, are available at CFMarketplace.org. The Center for Community Foundation Excellence offers professional development that is tailored to our field.

In partnership with Community Foundation Insights, community foundations are building a searchable database of operations and finance information that integrates with the FSG Cost-Revenue Model. The power of this new resource depends on widespread participation.

With these operational resources available, our opportunity is to find efficiencies in what we share and effectiveness in what we can do together.



Standards create a guide that community foundation leaders can use to ensure continuity. They are a unifier for the field in a time of scrutiny.

RUBEN ORDUÑA
Chair, Standards Action Team

Building on past investments, community foundations can strengthen organizational effectiveness.

GOAL *Achieve operational excellence*

Ways your community foundation can factor in

Comply with National Standards. These legal, ethical, and effective practices will help strengthen your organizations and the collective field as we grow in size, service, and accountability. The Council on Foundations website has resources to support your compliance process. You can use the Participant Handbook as an overall guide, see how new legislation affects National Standards, and listen to recorded assistance for compiling your record book. In addition, you can access the community foundation knowledge collected to date as a result of the Standards compliance process; this database is searchable by practice, methodology, and example.

Visit www.cof.org/nationalstandards

Promote your community foundation with effective strategies and professional marketing tools. Customize the National Marketing Action Team Portfolios to expand your existing communications materials to target key audiences, support your planned giving expertise, and market your community knowledge to engaged donors.

Download materials at www.cfmarkeplace.org

Analyze and benchmark operations information with peer organizations. When you participate in the Community Foundation Insights data resource, it's easy to catalog, cross-examine, and report on your statistics. An online tool allows foundations to generate comparative financial and operating data for a set of other community foundations you select. This analysis will contain data collected from community foundations across the country, including the results of foundations' cost-revenue analyses as well as the myriad of surveys on community foundation operations.

Share your experiences and innovative strategies with the community foundation field. Funding may become available for pilot projects and the dissemination of their lessons.

Register for professional development courses available through the Center for Community Foundation Excellence. In addition to community leadership, you can improve your capabilities in community foundation fundamentals, financial administration, resource development, and community impact.

Register at www.cof.org/ccfe

Deaf Positive

Staff members at **Heritage Fund – The Community Foundation of Bartholomew County** in Columbus, Indiana, learned just how much their donors value operational excellence and accountability. When the community foundation published a newsletter article about its compliance with National Standards, many donors offered their appreciation—including one reader who mailed back a copy of the article with notations of praise and a \$10,000 check.

ADDED ADVANTAGE

Community Foundation Insights

www.cfinsights.org

The Community Foundations Leadership Team is partnering with **Community Foundation Insights** to help community foundations collect, analyze and benchmark financial and operational data. FSG Social Impact Advisors established Community Foundation Insights to give participating community foundations access to up-to-date information on the finances and best practices of their peers.

Innovation Involvement

Progress is made when one good idea builds on another. In decades past, community foundations have shared knowledge spontaneously and informally. From one another, we have learned about new ideas and ways to give tired programs new vitality, strength, or reach. Progress was real, albeit incidental.

Personal networks, conferences, email, and webinars have made it easier to link our organizations and insights. What we lack—and what community foundations strongly support—is a comprehensive, cumulative system of knowledge management.

The Leadership Team is in the process of planning and seeking funding for such a system. In its early stages, we will use it to connect the field to key resources and catalog best practices from individual community foundations and regional partnerships. In full operation, a robust knowledge management portal will ensure that every community foundation effort—to cultivate donors, to help children succeed in school, to curb environmental threats, to nurture the arts, to lead change—can build on the best and latest thinking in philanthropy.



By our nature, community foundations want to share their learnings with one another. Our charge is to create a system for making this knowledge easy to access.

RICHARD REED, JR.

Chair, Knowledge Management Committee



The Community Foundations Leadership Team will serve as a resource and catalyst for knowledge sharing.

GOAL *Create, capture, and share knowledge*

Ways your community foundation can factor in

Join an electronic discussion list. Subscription-based email groups provide a forum for practitioners to discuss topics of mutual interest. To date, available listservs share issues and ideas about advancement and donor services, programming and grantmaking, scholarships, communications and marketing, finance, human resources, information technology, board governance, executive leadership, affiliate organizations, and community foundation service providers.

Contact us at cflistadmin@cof.org

Use resources and reports from the community foundation section of the Council on Foundations website. For example, the section offers a plan community foundations can use to prepare and respond to local disasters.

Visit www.cof.org/community

Document and share your knowledge with colleagues, a member of the Community Foundations Leadership Team or the Council on Foundations Community Foundations Services staff. Participate in site visits, conferences, volunteer committees, and other interactive gatherings.

Contact us at community@cof.org

Proof Positive

Using an example from outside the community foundation field, it is easy to see the value of relevant, accessible knowledge management. Connect Richmond provides residents of that community instant, free access to nonprofits, civic leaders, and community resources. In doing so, the site extends the reach and capacity of area nonprofits, funnels passionate people to opportunities for civic engagement and giving, and creates cross-sector connections. Nonprofit members visit connectnetwork.org/richmond to share issues, best practices, training, resources—and the spotlight. A project of the Partnership for Nonprofit Excellence, a supporting organization of **The Community Foundation Serving Richmond & Central Virginia**, Connect Richmond was developed by faculty, staff, and students at the University of Richmond.

Field Leadership

COMMUNITY FOUNDATIONS LEADERSHIP TEAM

This team of volunteers began their service to the field on July 1, 2007.

DARCY S. OMAN, CHAIR

*The Community Foundation
Serving Richmond & Central Virginia*

STEVE ALLEY

*Community Foundation for
Southern Arizona*

SARA BARNES

Marin Community Foundation

BRIAN T. BYRNES

The Vermont Community Foundation

JOHNNY DANOS

*Greater Des Moines Community
Foundation*

RICHARD FROST

The Winnipeg Foundation

ANTONIA HERNANDEZ

California Community Foundation

GREGORY BEN JOHNSON

The Greater New Orleans Foundation

DOUGLAS F. KRIDLER

*The Columbus Foundation & Affiliated
Organizations*

LESLIE LILLY

*The Foundation for
Appalachian Ohio*

KELLY LUCAS

*Community Foundation of
South Wood County*

TERRY MAZANY

The Chicago Community Trust

KEVIN K. MURPHY

Berks County Community Foundation

RUBEN D. ORDUÑA

Boston Foundation

RICHARD W. REED, JR.

The Pittsburgh Foundation

CARLEEN K. RHODES

The Saint Paul Foundation

HENRY L.P. SCHMELZER

Maine Community Foundation, Inc.

PATRICK M. WOODS

Marin Community Foundation

GAY YOUNG

New York Community Trust

In addition to the Leadership Team, more than 30 community foundation colleagues volunteer on the Legal and Regulatory Action Team, Standards Action Team, and Field Engagement Action Team. Thank you for your time and talent.

KEY RESOURCES

COUNCIL ON FOUNDATIONS

STEVE GUNDERSON

President and CEO

KEN STRMISKA

*Managing Director,
Community Foundation Services*

DORI KREIGER

*Director,
Community Foundation Services*

HEATHER SCOTT

*Member Services Manager,
Community Foundation Services*

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*National Standards Coordinator,
Community Foundation Services*

JANNE GALLAGHER

*Vice President and General Counsel,
Legal Services and Standards*

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*Deputy General Counsel,
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and Public Policy*

BRIAN FLAHAVER

*Manager, Government Relations
and Public Policy*

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*Chair, Board of Directors,
CFLeads*

CINDY BALLARD

*Executive Director,
CFLeads*

THOMAS S. HAY

*Chair, Advisory Board,
Community Foundation Insights*

WENDY HORTON

*Executive Director,
Community Foundation Insights*

COMMUNITY FOUNDATIONS LEADERSHIP TEAM ALUMNI

A special thank you to the Leadership Team volunteers who have just completed their service.

NANCY ANTHONY

Oklahoma City Community Foundation

DONALD ARNOFF

Community Foundation Alliance

SANDY DANIELS

Johnson County Community Foundation

TERRI FREEMAN

The Community Foundation
for the National Capital Region

SID HARTMAN

Marin Community Foundation

THOMAS S. HAY

The Pittsburgh Foundation

MARY JALONICK

The Dallas Foundation

JENNIFER JOBRACK

The Chicago Community Trust (formerly)

JENNIFER LEONARD

Rochester Area Community Foundation

RICHARD MAPPIN

Berks County Community Foundation

SUSAN NICHOLSON

Community Foundation of Louisville

JOAN PRINCE

Greater Milwaukee Foundation (formerly)

DONNA RADER

The Vermont Community Foundation

HOLLY C. SAMPSON

Duluth-Superior Area Community
Foundation

MOLLY STEARNS

The Seattle Foundation

GREG ZERLAUT

Fremont Area Community Foundation

We also recognize the contributions of those who served on the team since its inception.

SHERYL AIKMAN

Community Foundation of Western
North Carolina

STUART APPELBAUM

The Minneapolis Foundation

SIDNEY ARMSTRONG

Montana Community Foundation (formerly)

RICK BATYKO

The Cleveland Foundation (formerly)

ALAN CANTOR

New Hampshire Charitable Foundation
(formerly)

NELSON COLON

Puerto Rico Community Foundation

KATHRYN "KIT" CONROY

New York Community Trust

SUSAN BROWN DAVIS

The Community Foundation Serving
Richmond & Central Virginia

CAROL GOLDEN

Rhode Island Community Foundation

DAVID HATFIELD

Kalamazoo Community Foundation (formerly)

JACK HOPKINS

Kalamazoo Community Foundation

WENDY HORTON

Greater Milwaukee Foundation (formerly)

NANCY JONES

Community Foundation of Abilene

JAMES A. KING, III

The Community Foundation
of Greater Birmingham (formerly)

CATHY M. LEWIS

The Cleveland Foundation (formerly)

JOE LUMARDA

California Community Foundation (formerly)

MADELEINE MCGEE

Coastal South Carolina Community Foundation
(formerly)

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John S. & James L. Knight Foundation

MARK NEITHERCUT

Community Foundation for Southeastern Michigan
(formerly)

KATE NIELSEN

Community Foundation of Greater Birmingham

PEGGY OGDEN

Central New York Community Foundation

THOMAS PETERS

Marin Community Foundation

ALICIA PHILIPP

Community Foundation for Greater Atlanta

MARCIA RAPP

Grand Rapids Community Foundation

R. DENNIS RIGGS

Community Foundation of Louisville

CHRISTINE SEARSON

Saint Paul Foundation

GID SMITH

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DIANA SIEGER

Grand Rapids Community Foundation

FRED SILVERMAN

Marin Community Foundation

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Community Foundations of Canada

DEBORAH WHITEHURST

Arizona Community Foundation

SCOTT WIERMAN

Winston-Salem Foundation

TOM WILCOX

Baltimore Community Foundation

CLARENCE "REGGIE" WILLIAMS

San Antonio Area Foundation



COUNCIL *on* FOUNDATIONS

Community Foundations Leadership Team

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