



COUNCIL *on* FOUNDATIONS

21th Fall Conference for Community Foundations

CONFERENCE PROGRAM

Selected Pre-Conference Sessions

Special Workshop: Finding Meaning in Grantee Financial Information

Are you confused by the finances involved in community foundations work? This workshop will show you how to use key financial information—audited financial statements, IRS Form 990 and budget documents—to evaluate the financial health, resiliency and priorities of grantees. You'll explore case studies and accompanying exercises to help you put this new knowledge into practice.

Speaker:

Susan Kenny Stevens, Ph.D.

Executive Principal

LarsonAllen Public Service Group

Empowering the Community: Exploring Privilege

Community foundations have a unique opportunity to lead the effort to create a more equitable society in which all individuals can thrive. In this session participants will explore how the existence of unearned privilege can create roadblocks to the successful partnerships that drive positive social change. Many of us enjoy privileges—based on our race, gender, sexual orientation or socio-economic status—that can over empower some groups and disenfranchise others. Participants will explore how privilege can impact their relationships with people in other foundations, colleagues, donors, and grantees. Noted scholar Dr. Peggy McIntosh will share her insights and engage participants in critical dialogue that will help them to recognize and use unearned advantage to weaken systems of unearned advantage.

Facilitator:

Peggy McIntosh

Founder and Co-director, National SEED Project on Inclusive Curriculum

Wellesley College

Monday

Opening Plenary Breakfast

Join Emmett Carson, Board Chair of the Council on Foundations and President and CEO of the Minneapolis Foundation and Ben Johnson, Chair, 2005 Fall Conference and President and CEO of the Greater New Orleans Foundation as they welcome you to the 21st Fall Conference!

Seattle is home to many world famous icons - the Space Needle, Starbucks Coffee Company and the Pike Place Fish Market, an otherwise ordinary fish market that's extraordinarily successful. We will take a lesson from this fish market, where the work is hard and the hours are long-yet these employees make a personal choice to bring amazing passion, playfulness, commitment and a positive attitude to work every day.

Special guest speaker Andy Halper from Charthouse Learning will help launch the conference using The FISH! Philosophy. This exciting--and extremely entertaining—movie has been used by thousands of other organizations worldwide (including Saturn, Sprint and Southwest Airlines) to tap into the secrets of creating a super-satisfying work environment and even more... delighted customers. This philosophy will give you and your team a common language and inspire new conversations about what's possible. FISH! will get into your heart and mind, and empower you to be alive and engaged. The bottom line? FISH! has created a new vocabulary that won't just change how you view work; it just may change your entire view on life.

Concurrent Sessions

9:00–10:30 a.m.

Investment Survey: Review of 2004 Community Foundation Investment Performance

A great resource for board members and financial administration staff, this survey reveals the latest data on foundation performance. In addition to analyzing the data collected, this session will cover the articles presented in the report as well as the role and responsibilities of board members and investment committee members from a fiduciary perspective.

Speaker:

Michael Miller, CFA

Managing Director

Colonial Consulting, LLC

Creating and Nurturing Your Legacy Society

A frequent topic for questions on the AdNet listserve involves legacy societies. What are they? How are they used to support the development activities of community foundations? How does one create a legacy society and what are the options regarding cost, size, scope and activities? In general, legacy societies are honorary associations of individuals who are willing to attest to making a gift in their estate plan for their local community foundation.

Membership is uniquely defined by the differing community foundations but usually anyone who has made a provision for a planned gift is eligible. In this session experienced development professionals will talk about their particular community foundations, legacy society's practices, costs and value, and get ideas for building your own legacy society.

Speakers:

Mary Ellis Peterson

Gift Planning Officer
The Minneapolis Foundation

Robert Potter

President
Centre County Community Foundation, Inc.

Marketing Community Knowledge: Messages That Motivate and Move Donors

Based on recent research on donor perceptions and priorities, this session will examine how community knowledge fits into these priorities, how community knowledge can be marketed to appeal to prospective and current donors, and how to giving opportunities can be packaged to increase support for foundation-led community initiatives.

Speakers:

Sally Bock

Vice President
Pyramid Communications

Molly Stearns

Senior Vice President
The Seattle Foundation

Community Catalyst: How Community Foundations Can Be Agents for Local Change

Increasingly called upon to help address local needs, community foundations have been stepping into a new role: community catalyst. This session presents examples of catalyst work in action and reflections on what it takes to be effective, based on findings from the Community Foundations Initiative of The James Irvine Foundation.

Moderator:

Mark Sedway

Consultant
Williams Group

Speaker:

Michael M. Howe

President
East Bay Community Foundation

Peter H. Pennekamp

Executive Director
Humboldt Area Foundation

Boards Designed to Function as Knowledge Centers and Community Leaders

Case studies on how boards have adjusted their structure and function will be used to illustrate ways that boards have enhanced their role as knowledge centers and community leaders. The basics of effective governance will be emphasized throughout the session.

Speakers:

Teri A. Hansen

President and CEO
Gulf Coast Community Foundation of Venice

Sandy R. Hughes Ed.D.

President and CEO
Hughes Consulting Group, Inc.

James E. Klusman

President and CEO
Greater Lafayette Community Foundation

Facing Forever: Working with Families' Successor Advisors

When donor advised funds pass to the next generation, community foundations face many challenges such as geographic dispersion of the advisors, ideological differences and family dynamics. Participants will learn how to engage even distant donors, navigate family relationship issues and enlist their support for the community issues you are addressing.

Moderator:

Susan Crites Price

Managing Director, Family Foundation Services
Council on Foundations

Speakers:

Jeremy D. Arkin

Vice President of Philanthropic Services
Community Foundation for Greater Atlanta

Kelin Gersick

Senior Partner
Lansberg, Gersick and Associates

Practical Knowledge Track: Growing Giving Circles in Communities

Giving Circles are a powerful emerging philanthropic vehicle that community foundations are increasingly supporting and using to build community involvement, foundation visibility and donor engagement. This session features stories, ready-to-use tools and new information to help you decide whether and how to get involved with giving circles in your community.

Moderator:

Jessica Bearman

Deputy Director, New Ventures in Philanthropy
Forum of Regional Associations of Grantmakers

Speakers:

Charles Lewis

Engineering Design Lead
Southern Company

Kate Nielsen

President
The Community Foundation of Greater Birmingham

Bjorn Stromsness

SV2 and Donor Services Officer
Shasta Regional Community Foundation

NMAT Forum: Community Knowledge as a Selling Point—Marketing Local Expertise

Local expertise is a core message throughout National Marketing Action Team (NMAT) resources. Participants will learn why many see community knowledge as the central distinguishing value community foundations offer and how marketing this expertise helps engage donors, raise assets and make a difference. Plus, hear about the community foundation national marketing update for 2006 and beyond.

Speaker:

Robert H. Martin

Senior Consultant

Community Planning and Research, LLC

Hope Unraveled: The People's Retreat from Public Life and Our Way Back

For nearly two decades, Richard C. Harwood has led The Harwood Institute for Public Innovation in researching and developing tools and frameworks that define an alternative path for public life and public leadership in the United States. From 1990 through 2003, Harwood crisscrossed the country, engaging citizens in conversations about their relationship to politics, their communities and each other. His new book, *Hope Unraveled*, documents the 13-year evolution of citizen perspectives on their retreat from public life and their hopes for change. In this session, Harwood will discuss the implications of *Hope Unraveled* for strengthening public life and for public philanthropy today.

Speakers:

Richard Harwood

President

The Harwood Institute for Public Innovation

Patrick Miller

Research Assistant

The Harwood Institute for Public Innovation

10:45 a.m.–12:15 p.m.

Managing Multiple Support Organizations

Because of the publicity and interest in creating a supporting organization, many community foundations have begun the process of creating one or more of these entities. However, what will you do when you have a dozen or two dozen of them? What financial and operating issues can you expect as these entities increase both in number and in size? How do you help your donors concentrate and leverage their grantmaking decisions to make a difference in their community? Practical tips and techniques for managing your supporting foundations will be presented by the staff of The Columbus Foundation, which currently operates 30 of them.

Facilitator:

Raymond J. Biddiscombe, CPA

Vice President for Finance and Administration

The Columbus Foundation and Affiliated Organizations

Speaker:

Tamera Durrence

Assistant Vice President and Director of Supporting Foundations

The Columbus Foundation and Affiliated Organizations

Re-Engineering: Process Optimization at Community Foundations

What if community foundation staff members could spend more of their time engaging donors, business, community and nonprofit partners around issues and initiatives designed to enhance and improve the lives of everyone in their community and less time sifting through papers, tracking down data or manually processing documents? This session highlights strategies and tools designed to enhance and improve the efforts of community foundations to attract and meaningfully engage donors.

Moderator:

Deborah A. Whitehurst

Executive Vice President for External Affairs
Arizona Community Foundation

Speakers:

David R. Luckes, MBA

President and Chief Executive Officer
Greater Saint Louis Community Foundation

Laura L. Meyer

Executive Vice President
Foundation For The Carolinas

Effective Communications: Framing the Issues You Care About

Effective communication is critical to advancing, sharing and fostering community knowledge. This session will describe how to develop a communications frame—including five key questions to ask that will improve your community foundation's ability to share community knowledge and expertise. Peers who are employing this tool in their work will share their insights.

Moderator:

L. Benjamin Starrett

Executive Director
Fundors' Network for Smart Growth and Livable Communities

Speakers:

Dick Brooks

President
ActionMedia

Kevin K. Murphy

President
Berks County Community Foundation

Moving From "Trust Me" to "Show Me": Using Data to Foster Knowledge

Community foundations need credible data and information about their communities to inform their grantmaking and drive their leadership. Where do we start? What are the most vital local trends? How can we build an effective nonprofit community that uses data in planning? What's an affordable and workable way to track both quality and outcomes? Are there ways to do this that not only drive our own decisions, but also are useful to other foundations and the community or region at large? What are social indicators and are they contagious? This session will present a continuum of models for answering these questions, from creating them in-house, to identifying or helping build capacity in other institutions designed for this purpose.

Moderator:

Marcia Rapp

Vice President of Programs
Grand Rapids Community Foundation (MI)

Speakers:

Charlotte Kahn

Director
Boston Community Building Network

Donna Van Iwaarden

Consultant

Dorothy A. Johnson Center for Philanthropy and Nonprofit Leadership

Mary Olson

Vice President Donor Relations and Communications
Community Foundation for South Wood County

Mary Wirtz

Vice President, Program
Community Foundation for South Wood County

Achieving Social Change Through Adaptive Leadership

Foundations can depart from traditional methods and learn to use adaptive leadership techniques to become more effective at meeting complex social challenges. By drawing on real-life examples, this session will focus on the ways in which foundations have influenced change by mobilizing stakeholders to work toward a solution, rather than imposing one.

Speakers:

Jennifer Dowley

President
Berkshire Taconic Community Foundation, Inc.

Lew Feldstein

President
New Hampshire Charitable Foundation

John Kania

Managing Director
Foundation Strategy Group, LLC

Diana R. Sieger

President
Grand Rapids Community Foundation (MI)

Sterling K. Speirn

President and CEO
Peninsula Community Foundation

Do You Really Know the Values and Attitudes of High Net Worth Individuals?

A solutions company focused on the high-net-worth market, HNW, in conjunction with Community Foundations of America, will present the latest data on its Wealth and Values study. This newly published report defines affluent Americans' attitudes and intentions on an array of topics including happiness, security, charitable giving, religion, employment and family relationships - and how they have changed or remained the same as economic conditions have changed. This interactive discussion will provide attendees with actionable insights based on the survey's findings.

Speakers:

Teri A. Hansen

President and CEO
Gulf Coast Community Foundation of Venice

Ken Paterson

Vice President, Research
HNW, Inc.

Practical Knowledge Track: Growing Endowments and Community in Rural Places

Rural community funds are growing—their number has doubled since 1998, exceeding 1,000 today. In rural places, the act of growing a locally controlled community fund can also build community knowledge, leadership and civic capacity. Participants hear the dozen leading

tactics seasoned rural fund builders use to grow rural endowment and rural self-sufficiency at the same time.

Moderator:

Janet Topolsky

Director, Community Strategies Group
Aspen Institute

Speakers:

Alan McGregor

Director of Philanthropic Programs
Southern Rural Development Initiative

Jane Hetland Stevenson, MPA

Associate Director, Community Strategies Group
Aspen Institute

Jeffrey G. Yost

President and CEO
Nebraska Community Foundation

Technology Steering Committee Update: Testimonials from Early Adopters

This session highlights the latest activities of the Technology Steering Committee (TSC), a field-wide effort to match community foundations' most pressing business needs with the technology to meet those needs. Several early adopters of TSC-sponsored solutions will share their experiences, lessons learned and implementation strategies.

Moderator:

Sid Hartman

Vice President, Finance and Administration
Marin Community Foundation

Speakers:

Keith Burwell

President and CEO
The Toledo Community Foundation

Kit A. Conroy

Chief Financial Officer
New York Community Trust

Kevin Lyle

Former Chair
Baton Rouge Area Foundation

Community Knowledge as a Selling Point to Financial Institutions

Community knowledge is the key value-add that community foundations bring to the table when pursuing partnerships with national and regional financial institutions. This session will give an overview of the national activities involving partnerships between community foundations and financial institutions, and highlight the ways in which community foundations are filling their roles in these partnerships.

Moderator:

Carla E. Dearing

President and CEO
Community Foundations of America

Speakers:

William H. Brownson

Vice President

JP Morgan Client Services
Greg Jones
Managing Director
Community Foundations of America

Plenary Luncheon

Thomas Stewart, Editor, *Harvard Business Review*

Tom Stewart pioneered the field of intellectual capital—managing products, processes and people to benefit from the knowledge inherent in each. Tom is an insightful, authoritative and compelling speaker on a wide range of topics beyond just intellectual capital and knowledge management. Tom's most recent book, *The Wealth of Knowledge: Intellectual Capital and the Twenty-first Century Organization*, reveals how today's companies are applying the concept of intellectual capital in day-to-day operations to improve success. This indispensable book offers business leaders both a strategic context and a practical course of action for transforming knowledge assets into business growth.

Concurrent Sessions

2:00–3:30 p.m.

Investment Committees: Best Practices for Community Foundations

This session will include a panel of seasoned foundation investment committee members who will share best practices regarding establishing asset allocations and hiring and firing investment managers. Additional topics will include conflict of interest issues and ways to deal with influential donors and difficult committee members.

Speakers:

Tom Alberg

Madrona Venture Group

Conny Jamison

Board Member

The San Diego Foundation

Dirk Sonneborn

Vice President

Central New York Community Foundation, Inc.

IT: Developing Effective Strategies

Three community foundations of varying sizes will discuss their strategic plans and administration of technology strategies. This session, hosted by the new community foundation technology managers group, CFIT, will also offer an open forum for questions.

Moderator:

Richard H. Myers

Technology Consultant

Foundation For The Carolinas

Speakers:

Keith Burwell

President and CEO

The Toledo Community Foundation

Susan V. Nicholson, CPA

Vice President and CFO
The Community Foundation of Louisville

Holly Welch Stubbing JD

Senior Vice President Client Services
Foundation For The Carolinas

Working with the Media: Creating Community Dialogue While Building Visibility

This session will examine a multitude of ways community foundations can work with the local media to elevate community dialogue and enhance their foundation's visibility. From editorial mentions to columns by foundation staff to community research collaborations, this session will examine the benefits and pitfalls of working with media outlets to share knowledge and create community discussion.

Moderator:

Steven R. Joul

President
Central Minnesota Community Foundation

Speakers:

Bill Albrecht

President and Publisher
St. Cloud Times / Gannett

Michelle McGurk

Director of Communications and Marketing
Community Foundation Silicon Valley

Beyond the Dollar: Using Your Staff as Your Greatest Asset for Community Impact

In 1998, the Greater Green Bay Community Foundation decided to stretch its bounds by providing significant knowledge services without significant discretionary funds. Participants learn what roles they play, how they turned these services into a fee for service structure and how the foundation benefits as a knowledge source in a mid-sized community.

Facilitator:

Nancy Reiche

Vice President for Programs
Community Foundation of Western Massachusetts

Speakers:

Martha Ahrendt, Ph.D.

Program Officer
Greater Green Bay Community Foundation, Inc.

Kenneth D. Strmiska Ed.D.

President and CEO
Greater Green Bay Community Foundation, Inc.

Active Oversight: Governance and the Law for Community Foundation Boards

Whether you're new to board service or have been on the job for years, you'll want to stay in tune with legal and practical developments in board governance. Learn how to avoid common legal pitfalls and more than live up to your board governance responsibilities. This session will ground you in the obligations and opportunities that make a real difference in how your community foundation is governed.

Speakers:

Karen Green

Director, Governing Board Programs
Council on Foundations

Andrew Schulz

Deputy General Counsel
Council on Foundations

Practical Knowledge Track: Promising Practices in Donor Education

How do donors learn? What kind of learning experience do they want? What do they need to know? The question of how best to help donors gain knowledge and skills about philanthropy is a complicated one. What kinds of learning promote thoughtful, ethical and engaged philanthropy? Several organizations that have tackled this question in very different ways will discuss their experiences and explore a working model of donor education competencies and content.

Moderator:

Kristin Anderson Lindsey

Principal
Intersector Consulting

Speakers:

Robert S. Collier

President and CEO
Council of Michigan Foundations

Beverley Francis, MA

Director of Philanthropic Services
Triangle Community Foundation

Aaron Jacobs

Senior Program Manager
Social Venture Partners Seattle

U.S. National Standards Update: *What Does It Mean for My Foundation?*

The Standards Action Team chair will open the session outlining the process for standards implementation and the specific benefits associated with the Intent to Comply and the Confirmation of Compliance. Foundation representatives will share their experiences of putting together their record books, responding to compliance reviewer inquiries, and achieving Confirmation of Compliance with National Standards. Participants will hear peers who have just been Confirmed in Compliance with National Standards. Learn from their experiences as you prepare to submit materials or are awaiting a determination letter.

Moderator:

Dolores Kreiger

Program Manager, Community Foundation Services
Council on Foundations

Speaker:

Mary M. Jalonick

Executive Director
The Dallas Foundation

Landmark Research: Community Foundation Administration and Compensation Cost Levels

For the past two years, the foundation community has been preoccupied by difficult

questions concerning administration expense levels and staff and board compensation practices. In landmark research on the top 10,000 foundations, supported by the Charles Stewart Mott Foundation and the Ford Foundation, the Foundation Center, Urban Institute and GuideStar merged key data sets to begin to answer these questions. This workshop will explore the administration and compensation cost levels of the 375 largest community foundations included in the set. Participants will learn how such factors as asset size, giving levels, age and staffing levels affect the compensation and program services expense patterns of these foundations, and how community foundations overall compare to private foundations in the dataset.

Speakers:

Elizabeth Boris

Director, Center on Nonprofits and Philanthropy
Aspen Institute

Loren Renz

Vice President for Research
The Foundation Center

Mobilizing Community Foundations for Social Justice

Community foundations are flourishing in countries around the world and tackling the toughest social problems. This session will explore the potential for community foundations to be a force for social justice at home and around the world—and the challenges that opportunity presents to all of us.

Moderator:

Monica Patten

President and CEO
Community Foundations of Canada

Speakers:

Josie Ward Heath

President
The Community Foundation Serving Boulder County

Agustin Landa

Vice President for Development and Linking
Universidad Popular Autonoma Popular del Estado de Puebla

Betsy Martin

Director of Programs
Community Foundations of Canada

3:45–5:15 p.m.

Investments: Trends in a Changing Marketplace

With new capacities and increased visibility in both the philanthropic and wealth management markets, community foundations have many more opportunities to diversify their investment management options. This session will highlight new trends in investment management, including issues and concerns that community foundation investment committees need to consider to be prepared to participate in these new opportunities.

Moderator:

John Sherwin Jr.

President
Mid Continent Ventures, Inc.

Speakers:

Nicholas DeMonico

Managing Director and Group Head, Marketable Alternative Investments
Commonfund Capital, Inc.

Thomas J. Hartland

Chief Executive Officer
Hartland and Co. Investment Consultants

Caroline Roberts Heine

Managing Director
Community Foundations of America

William Pihl

Principal
PGR Solutions

"Six Degrees or Less" Separation–Fun Asset Development Strategies for Board Members and Volunteers

How far away are your board members and other volunteers from making “the ask?” Do more than "six degrees" separate them from the broad field of potential donors in your community? (Six degrees of separation is the theory that each of us can be connected to any other person on the planet through a chain of acquaintances that includes no more than five people between us and that person.)

This session will explore creative, fun ways to engage staff, board members and volunteers in the art of asset development and to reduce those degrees of separation that hinder effectiveness. Targeted to staff and board members of small and medium community foundations (particularly those using volunteers to fulfill development needs), this session will suggest strategies to energize development efforts and to move community foundation supporters into closer and stronger roles with local donors, moving them along a continuum that begins with simply being an advocate to becoming an active steward of a community foundation.

Speakers:

Judy W. Sjostedt

Executive Director
Parkersburg Area Community Foundation

Beth A. Stipe

Executive Director
Community Foundation of North Central Washington

Community Foundations as Neutral Conveners

A community foundation was asked to serve as a neutral convener on two key public issues: creating a blueprint for homelessness and developing of a land use plan for a tract containing historical register sites. Participants will come away with knowledge of what worked, what didn't and the vital role of internal and external communications throughout the process.

Speaker:

Rose Dangerfield

Director of Development and Donor Services
Central Carolina Community Foundation

Vicki Jones

Assistant Vice President, Community Philanthropy
Foundation for the Carolinas

The Future of Community Philanthropy: Landmark Research to Inform the Field

What will community foundations look like in 20 years? How can we prepare? This workshop builds on the highly acclaimed session that experts Lucy Bernholz and Katherine Fulton led on the future of community foundations at the 2004 Fall Conference, based on a project funded by the Mott and Ford foundations. After a year of research and scores of interviews and discussions, Bernholz and Fulton will present findings that offer provocative scenarios, as well as emerging threats and great opportunities.

Moderator:

Linetta J. Gilbert

Program Officer
The Greater New Orleans Foundation

Speakers:

Lucy Bernholz

President and Founder
Blueprint Research and Design, Inc.

Katherine Fulton

President
The Monitor Institute

Gabriel Kasper

Consultant, Monitor Institute

HomeTown Competitiveness: A Comeback/Giveback Approach to Building Community Philanthropy

HomeTown Competitiveness (HTC), a program of the Nebraska Community Foundation, involves collaborative development based within four areas - entrepreneurship, endowment building, youth, and leadership. HTC demonstrates how communities can attract or retain residents by employing this community-owned approach. HTC received the Innovative Program Award from the International Community Development Society in July 2004.

Moderator:

Jeffrey G. Yost

President and CEO
Nebraska Community Foundation

Speakers:

Jan Krotter Chvala

Secretary, NCF Board of Directors
Nebraska Community Foundation

Robert Stowell

Regional Vice Chair of the NCF Board of Directors
Nebraska Community Foundation

Practical Knowledge Track: Reaching Out to Donors of Color

Engaging donors of color means much more than diversifying a foundation's assets. This session will share new research highlighting the motivations and attitudes behind giving in various communities. Participants will learn from experienced practitioners about the strategies, practices and partnerships that lead to mutually beneficial relationships between community foundations and diverse donors.

Moderator:

Eugene Miller

Assistant Director
Center on Philanthropy and Civil Society

Speakers:

Laura Berry

Senior Vice President for Philanthropic Services
Community Foundation for Greater New Haven

David Gibbs

Director of Programs
Community Foundation for Greater Atlanta

Michael M. Howe

President
East Bay Community Foundation

Legislative Update

Congress, state legislatures, regulatory bodies and the media continue to focus unprecedented attention on foundations. This session will cover the latest about legislative and regulatory issues that affect community foundations in the United States and encourage participants to discuss how community foundations are sharing their wealth of knowledge and expertise to influence policy decision-making.

Moderator:

Luis Maldonado

Director, Government Relations and Public Policy
Council on Foundations

Building Capacity and Increasing Knowledge by Harnessing the Power of Your Board

This session will discuss the findings from two major research initiatives designed to better understand the unique challenges community foundation boards face in balancing their complex, often competing roles as grantors, grantees, and representatives. Specific attention will be paid to how boards increase foundation capacity particularly in terms of decision making, community coordination, and information dissemination.

Speakers:

Lisa Dobey

CEO
Truckee Tahoe Community Foundation

Teri A. Hansen

President and CEO
Gulf Coast Community Foundation of Venice

Bruce Lesley

Senior Governance Consultant
BoardSource

Judith L. Millesen

Assistant Professor
Ohio University

Making High Schools Work for All Students: What It Takes and How Foundations Help

Long forgotten in the education reform debates, high schools are increasingly the focus of state and federal attention. This session will look at what we know about today's high schools, what key initiatives are underway nationally and within states, and how communities and funders are working collaboratively to improve their schools.

Speakers:

Rick Lear

Director, Small Schools Project

Center on Reinventing Public Education, Small Schools Project

Terry Mazany

President and CEO

The Chicago Community Trust

Joel Vargas

Senior Project Manager

Jobs for the Future

Carol Rava Treat

Senior Policy Officer, Education Advocacy

Bill and Melinda Gates Foundation

Tuesday

Breakfast Plenary with the Community Foundations Leadership Team

“Leadership for the Future”

During the past year, the Leadership Team has been examining a range of emerging trends and issues that could significantly shape the future of the community foundation field including legislative threats, financial sustainability, donors of the future, community leadership, impact and effectiveness and relationships with the United Way and others. Join your colleagues for a briefing on the findings of this strategic planning process and participate in interactive discussions to provide feedback on the Leadership Team’s plans moving forward. This is an opportunity for the field to organize and act now to address the challenges and opportunities ahead.

Speaker:

Jennifer Leonard

Chair

Community Foundations Leadership Team

Concurrent Sessions

9:15–10:45 a.m.

Charitable Gift Annuities: Maximizing the Benefits and Minimizing the Risks

Charitable gift annuities (CGAs) are now the most popular life income gift vehicle with total assets nearly matching charitable remainder trusts. This session will cover much-needed information for those wondering if their community foundation should be in the CGA business or interested in making sure your CGA program is structured to maximize benefits and minimize risks.

Speaker:

Bryan Clontz

Senior Consultant

Ekstrom and Associates

In the Trenches—Information Technology Essentials

This session presents a discussion between IT professionals on important technology issues. Topics will include security, hardware/software upgrades, backups, how to choose an IT consultant, Web resources and basic technology planning as well as the essentials and the pitfalls for those with no dedicated IT staff.

Moderator:

Michael A. Murphy

Directory, Information Technology
Oklahoma City Community Foundation, Inc.

Speaker:

Al Angarita

Director of Technology
The Baltimore Community Foundation

James Bickel

Director of Technology
The Cleveland Foundation

Jonathan Brelsford

Director, Information Technology
The Pittsburgh Foundation

Reaching Out to Families: Strategies for Success

More and more community foundations are reaching out to families not only in development efforts but also to fulfill a mission to encourage giving and volunteering. Building on the session about family philanthropy held at last year's fall conference, this session focuses on how you can reach out to this constituency. What strategies and tools are used with professional advisors and with families, and how do foundations help advisors serve their clients around this issue? This session details how the Seattle Foundation tackles these issues, with foundation staff, a professional advisor, and members of a donor family sharing their experiences and "what works."

Moderator:

Fred Silverman

Vice President, Marketing and Communications
Marin Community Foundation

Speaker:

Deanna Oppenheimer

Board Member
The Seattle Foundation

Jeni Oppenheimer

Philanthropist
The Seattle Foundation

Sandra Perkins

Attorney at Law
Sandra Lynn Perkins, PLLC

Sarah Wirz

Director of Donor Services
The Seattle Foundation

The Secret Lives of Potential Donors: Using Research to Build Prospect Relationships

Research should be the start of all public relations and marketing efforts. Without it, campaigns and other efforts won't realize their full potential. With good public opinion research we can better know our donors, potential donors and what motivates them to be involved. This session will cover how to use and manage research to achieve results and build relationships.

Speakers:

John Cavanagh

Co founder
EPIC MRA

Roberta Frances King, APR

Vice President of PR and Marketing
Grand Rapids Community Foundation (MI)

Stacey Smith

Senior Counsel
Jackson, Jackson and Wagner Behavioral Public Relations

Crisis Communications in the Foundation World

If you can keep your head while those about you lose theirs – you're probably not in the direct line of fire. Mistakes happen, crises do occur and you don't have a crisis plan, do you? Cool-headed action and clear communications rule the day. We'll discuss how to prepare for a crisis before it happens and the steps that need to be taken to control the situation when it does, including responding to hostile questions, staying with your message, issuing a written statement and the ever-important following up with your grantees. We'll also have real-life crisis situations to dissect (the names will be changed to protect the innocent), and there will be plenty of time for discussion.

Speakers:

Jeff Martin

Director, Media Relations
Council on Foundations

Michelle McGurk

Director of Communications and Marketing
Community Foundation Silicon Valley

Phillip A. Nash

Vice President for Communications
Rose Community Foundation

Relations Between Community Foundations and United Way: A National Study

As community foundations seek to increase the capacity to serve as community knowledge centers and leaders, what impact do the re-branding efforts and new activities of United Ways have? This session will share results of a national research study that explores the roles and relationships of United Ways and Community Foundations.

Moderator:

Nancy Ragey

Senior Consultant
CompassPoint Nonprofit Services

Speakers:

Robert S. Collier

President and CEO
Council of Michigan Foundations

Terri Lee Freeman

President
The Community Foundation for the National Capital Region

Jennifer Leonard

President and Executive Director
Rochester Area Community Foundation (NY)

How Community Foundations Draw on Their Influence to Become Knowledge Centers

Our knowledge of the community is an important source of power and it gives us the advantage in many circumstances. But with power comes added responsibility or we could end up doing more harm than good. Should we lead boldly or take an understated approach? When should we wield our power, if at all? How and when we use our clout is a calculated decision that involves all aspects of the organization. The power within community foundations is precious and this session will explore how we can use this influence judiciously and effectively.

Moderator:

Deborah Ellwood

Vice President, Community Programs
Rochester Area Community Foundation (NY)

Speakers:

Lew Feldstein

President
New Hampshire Charitable Foundation

Alicia A. Philipp

President
Community Foundation for Greater Atlanta

Community Knowledge—Delivering on Our Value Proposition

Recognition is growing that the ability to capture and share community knowledge is central to the community foundation value proposition. What exactly is meant by community knowledge? What is required of community foundations to embrace it as a donor empowerment strategy and a way to differentiate competitors?

Moderator:

Susan Herr

Managing Director
Community Foundations of America

Speakers:

Kathryn E. Merchant

President and CEO
The Greater Cincinnati Foundation

Holly Welch Stubbing, JD

Senior Vice President Client Services
Foundation For The Carolinas

Wealthy Youth: Money, Class and Philanthropy Working Together

How can we best move beyond philanthropy programs for children and youth to further develop the philanthropic capacity of young adults who have earned or inherited wealth? Many of these young adults, who are emerging leaders, decision-makers, and philanthropists in our communities, are untapped resources. Stewarding these resources requires innovation and responsiveness to all facets of community. This session will explore strategies and tools to expand at all levels the participation of young adults in your foundation. The mission of Resource Generation is to address this exciting challenge. They will share what they have learned from working with this up-and-coming constituency.

Speaker:

John Harrison

Partnership Manager

11:00 a.m.–12:30 p.m.

Recruiting and Selecting the Stars

Community foundation staff may share the same vision—to serve our community—but those on staff do not share the same talents or skills. Discovering this in an hour interview is a superhuman feat—even more so at a small organization where each selection is critical. As a hiring manager, your challenge is to match the right person to the right job and to let their talents shine. You'll leave this session equipped with the ability to apply behaviorally based interview techniques as well understand how interview formats can be tailored to fit core community foundation roles.

Moderator:

Lisa Bachman, SPHR

Human Resources Manager
The Minneapolis Foundation

Idelia Brantley

Human Resources Director
The San Francisco Foundation

Speaker:

Dee Dee Azzani

Managing Director
Korn/Ferry International

Insurance: What Do Community Foundations Need?

This session will teach you about the various types insurance that community foundations of all sizes need, including general liability, directors and officers, building/contents and health insurance. It will also address many of the risk management issues community foundations face. Attendees will walk through the sometimes confusing maze of insurance terminology, coverage, limits and more!

Speaker:

Patrick O'Conner

Executive Vice President
City Securities

How Community Foundations Exchange Ideas to Advance Knowledge

Community knowledge shouldn't be confined within the walls of the community foundation. Sharing our expertise with a broad audience allows for the exchange of ideas and can enhance our work with donors and volunteers. This session will highlight best practices to educate community leaders about trends, needs and policy responses.

Moderator:

Wendy Lewis Jackson

Program Director
Grand Rapids Community Foundation (MI)

Speakers:

Christelle E. Langer

Vice President, Marketing and Communications
The Minneapolis Foundation

David Trueblood

Director of Public Relations
Boston Foundation

A Nontraditional Reflection on Donor Services—How Starbucks Addresses Customer Service

Rather than a "traditional" session on donor services led by a foundation colleague or two, we will consider donor relations from a "nontraditional" for-profit, customer relations perspective. Being in the backyard of Starbucks affords us a special opportunity to better understand their customer service work and how that may correlate to our donor services work. What do they do? How do they determine what to do? How do they gauge beyond sales figures the success of what they do? This promises to be an "out of the box" engaging session but sorry, no coffee samples will be included.

Speaker:

Eric Anderson

Community Philanthropy Officer
The Minneapolis Foundation

Increasing Assets and Giving More: Partnering with Financial Firms

This session will explore examples of community foundations collaborating with financial firms. With these partnerships, stockholders can seamlessly transfer securities to philanthropic advised funds and immediately aid the causes they care about most. Financial firms can better serve their clients, community foundations can gain new donors, and our communities can become stronger.

Moderator:

Peter Hero

President
Community Foundation Silicon Valley

Speakers:

S. Sue Brown

President and CEO
Sioux Falls Area Community Foundation

Claire Costello

Director
Citigroup Foundation

Caroline Roberts Heine

Managing Director
Community Foundations of America

Community Foundation Marketing as a Science—Not Just Art

This session will show participants how to do their own brand analysis and marketing planning through a case study about one community foundation's yearlong adventure to apply valuable insights from consumer products marketing. Participants will gain an understanding of the methodology the foundation followed, take away tools they can use back home, and hear how community knowledge fit in the resulting strategy.

Speakers:

Amy Lynn Cheney, CPA

Vice President for Giving Strategies
The Greater Cincinnati Foundation

Elizabeth Bower Reiter, APR

Vice President for Communications and Marketing

The Greater Cincinnati Foundation
Nancy K. Swanson
Governing Board
The Greater Cincinnati Foundation

Mining the Gold: Digging Up the Stories at your Foundation

Great stories take place everyday at community foundations. How do you encourage people to share good stories internally and externally? How do you feed stories to staff with communications responsibility? How do you decide which stories to tell the world? At this session, you will walk away knowing some best practices for mining the "golden stories" in your foundation.

Speakers:

Rebecca Arno

Vice President of Communications
The Denver Foundation

Evelyn Clark

The Corporate Storyteller
Clark and Company

Having Global Impact: Community Foundations Meet the World Bank

At first glance, it might appear that community foundations have nothing in common with a large multilateral institution like the World Bank, but looks are deceiving. For more than two years, an advisory committee of the Council on Foundations has collaborated with the World Bank to raise awareness about the potential of community foundations around the world to serve as building blocks for the Bank's poverty reduction strategies. This session will examine this exciting initiative.

Moderator:

Rob Buchanan

Director, International Programs
Council on Foundations

Speakers:

Linetta J. Gilbert

Program Officer
The Greater New Orleans Foundation

Gaynor Humphreys

Director
Worldwide Initiatives for Grantmaker Support (WINGS)

Juraj Mesik

Senior Community Foundation Specialist
The World Bank

Community Change Makers: The Promise and Challenge of Taking a Leadership Role

This is a critical time for community foundations. Our sector continues to grow as the communities we work in are more complex than ever. From our vantage point, we can often see new ways to lead change that many times includes more than grantmaking. Based on the research from Chapin Hall, this session will explore the types of leadership roles community foundations are playing and some of the challenges those roles have posed.

Moderator:

Randi Hewit

Program Officer

The Community Foundation of the Elmira-Corning Area, Inc.

Speaker:

Cindy Sesler Ballard

Executive Director

Coalition of Community Foundations for Youth

Ronald Vernon Gallo, Ed.D.

President and CEO

The Rhode Island Community Foundation

Ralph Hamilton

University of Chicago

Harold Richman

University of Chicago

Thomas E. Wilcox

President and CEO

The Baltimore Community Foundation

Plenary Lunch

"Education of a Philanthropist", Bill Gates Sr.

Bill Gates, Sr. will recount the experiences that his son's foundation has had since it began ten years ago. He'll discuss current views about effective philanthropy and giving, the role community foundations can play and his general thoughts on the state of philanthropy and its future.

As co-chair of the Bill and Melinda Gates Foundation, Bill Sr. guides the vision and strategic direction of the foundation. He earned his bachelor's and law degrees from the University of Washington, following three years of U.S. Army service in World War II. A founding partner at Preston Gates and Ellis, he has served as president of both the Seattle/King County Bar Association and the Washington State Bar Association. Gates has served as trustee, officer and volunteer for more than two dozen Northwest organizations, including the Greater Seattle Chamber of Commerce and King County United Way. In 1995, he founded the Technology Alliance, a cooperative regional effort to expand technology-based employment in Washington. He has long been a strong advocate for education, chairing the Seattle Public School Levy Campaign in 1971 and serving as a member of the University of Washington's Board of Regents since 1997.

Special Session

CCFY Special Session: Breakthrough Change—What Can I Do by Next Tuesday

A rapid change approach to improve practice in health care and child welfare settings will be discussed. Participants will share strategies on how to build and sustain foundation roles as leaders, collaborators and knowledge centers. Plan today what you can do differently by next Tuesday.

Participants will apply this new improvement approach in several areas: leading efforts to address social issues, collecting and sharing community knowledge, developing common outcome measures, collaborating with other funders and partners and tackling systemic issues. This new methodology promotes cross-foundation collaboration and engagement with community partners, and provides a structure that community foundations can use to

take successful strategies to scale.

Facilitator:

Cindy Sesler Ballard

Executive Director

Coalition of Community Foundations for Youth

Winsome Hawkins

Associate Director

Coalition of Community Foundations for Youth

Speakers:

Michael M. Howe

President

East Bay Community Foundation

Lucy Salcido Carter MA, JD

Consultant

Concurrent Sessions

2:15–3:45 p.m.

Finance, Technology and Human Resources Roundtables

Have some specific questions or want to know what your peers are doing? Roundtable discussions will cover a wide variety of finance, administration, technology and human resource topics. This will be a great opportunity for you to interact with your peers.

Non-Cash Assets: Securing and Managing Them Creatively

Your donors own more than just cash and public stock. This highly interactive and practical session will cover how to market, receive and liquidate non-cash assets in all their wild and woolly forms. Numerous case studies will be used to illuminate various non-cash issues and risk management strategies.

Speaker:

Bryan Clontz

Senior Consultant

Ekstrom and Associates

Managing Scholarships: Running a Cost-effective Program

Participants will learn how to make their scholarship program more efficient and still responsive to donors' wishes. This session will cover topics important to scholarship administration including: fee and service structures, technology trends such as online applications, and scholarship donors' expectations and the services provided by community foundations.

Speaker:

James Patterson

Program and Scholarship Officer

Community Foundation of Northern Illinois

Kalei Stern

Scholarship officer

The Hawai'i Community Foundation

Strengthening Native Philanthropy through Local, Regional and National Partners

Community foundations are eager to provide effective outreach, technical assistance and funding support to native communities. Local Seattle-based foundations The Bill and Melinda Gates Foundation and the Seattle Foundation work with a regional tribal community foundation, the Potlatch Fund, to move grants to local grassroots communities that cover both urban and reservation-based native communities. Participants will view a video of actual projects that were supported through a native foundation that served as an intermediary for grassroots projects. You will learn how program officers in the Seattle foundation community have developed outreach strategies and relationships based on trust and respect that have resulted in cutting edge community projects. Also you will hear how the newly formed Grantmakers of Color Affinity Group, through Philanthropy Northwest, has led to new relationships in the local network.

Moderator:

Joy Persall

Executive Director
Native Americans in Philanthropy

Speakers:

Andrea Alexander

President
Potlatch Fund

Anne Katahira

Program Officer
The Seattle Foundation

Ken Thompson

Program Officer, Pacific Northwest Program
Bill and Melinda Gates Foundation

Corporate Funds: What Does It Take to Attract and Serve Local Corporations?

Why does a corporation choose to work with a community foundation? Participants will learn how to secure new corporate funds and what types of services they require as well as hear first-hand from a corporate donor who works with several community foundations. Community Foundation Silicon Valley works with over 20 corporations, many of which rely on the foundation for grantmaking and community expertise. Most Community Foundation already offer a variety of services that could help local corporations connect to the community. We'll share concrete examples, lessons learned and strategies you can take home to build their portfolio of corporate funds.

Moderator:

Peter Hero

President
Community Foundation Silicon Valley

Speakers:

Catherine Gowen

Cisco Giving Counselor/Development Officer
Community Foundation Silicon Valley

Sarah E. Meyer

Director
Microsoft Corporation

Julie Moore

Corporate Services Officer
Community Foundation Silicon Valley

Community Knowledge as Content: Targeting High Net Worth Donors

Engaging high net worth individuals in the philanthropic initiatives of the community foundation is key to serving their charitable wealth management needs. In this session, participants will hear from experts in identifying, targeting and engaging high net worth donors. The Cleveland Foundation's identification of high net worth prospects' interests and development of e-newsletter and personalized web pages will be highlighted, as will the direct mail, advertising and e-newsletter efforts of the Rhode Island Foundation.

Speakers:

Richard J. Batyko

Vice President for Communications and Marketing
The Cleveland Foundation

Rick Schwartz

Vice President for Communications
The Rhode Island Community Foundation

Marsh Williams

Principal
Neulogic Media

On the Same Page: Key Message Training for Staff and Board Members

Your community foundation's best marketing assets are your staff and key volunteers. How do you make sure that everyone is sharing the messages about your foundation that are most effective? In this session, you will hear case studies from foundations that have enacted key message training and learn about their successes, challenges, and pitfalls.

Facilitators:

Phil Arkow

Marketing and Communications Officer
The Philadelphia Foundation

Rebecca Arno

Vice President of Communications
The Denver Foundation

Gigi Wirtz

Director of Communications
The Baltimore Community Foundation

Diversity, Inclusion and Opportunity

Increasing your foundation's diversity to more fully reflect your community, through access to new donors and relevant grantmaking, is more than just a worthy ideal. This workshop, through a 10-Step Diversity Initiative, will demonstrate how a focus on diversity and inclusiveness can help your foundation comply with the National Standards for U.S. Community Foundations.

Speakers:

Jane Humphries

Director of CF-LINKS
Community Foundations of Canada

Betsy Martin

Director of Programs
Community Foundations of Canada

Young Staff: Leadership and Networking Programs That Work

Community foundations are using innovative strategies to retain young professional staff by

helping them build leadership skills and community knowledge. This session will highlight these strategies as well as three distinct programs that provide networking opportunities for emerging foundation leaders and their professional peers who share an interest in philanthropy.

Moderator:

Kimberly Russell

Communications Officer

The Community Foundation Serving Richmond and Central Virginia

Speakers:

Vicki Jones

Assistant Vice President, Community Philanthropy

Foundation For The Carolinas

Molly McCarty

Finance Officer

The Community Foundation Serving Richmond and Central Virginia

George Penick

President

Foundation for the Mid South, Inc.

4:00–5:30 p.m.

Evolving the Community Foundation Model for Success

Community foundations are facing unprecedented challenges. Yet, through focusing leadership attention on becoming both sustainable and differentiated, community foundations have the potential to emerge over the next decade as one of the most influential entities in the social sector. This presentation includes the Foundation Strategy Group's newest 2005 research on sustainability, funded by the Community Foundations Leadership Team.

Speaker:

John Kania

Managing Director

Foundation Strategy Group, LLC

One Community Foundation Leads a Citywide Vision for 2015

Launched by Foundation For The Carolinas, in partnership with The John S. and James L. Knight Foundation, Crossroads Charlotte is a civic engagement process designed to shape the future of an entire city. Throughout Charlotte, individuals and institutions are inspired to action by four plausible community futures. Session participants will learn about this innovative program and, themselves, experience part of the interactive, multimedia process.

Speakers:

Claude Alexander

Senior Pastor, University Park Baptist Church

Community Building Initiative

Jessica Deltac

Dianne English

Executive Director

Community Building Initiative

Madine Fails

President and CEO, Urban League of the Central Carolinas

Community Building Initiative

Valaida Fullwood

President
Community Building Initiative

Kendra Griffin

Laurence Maher

Michael Marsicano, Ph.D.

President and CEO
Foundation For The Carolinas

Angeles Ortega

President, Latin American Coalition
Community Building Initiative

Cyndee Patterson

President, The Duke Mansion and Lee Institute
Community Building Initiative

Tracy Russ

President
Russ Communications Group

Quentin Talley

U.S. National Standards: Understanding Compliance Documents

As your foundation prepares for the Confirmation of Compliance phase of National Standards, this session will help you learn more about the compliance documents that have received the most questions from your peers in the National Standards process. You will gain from their experience as you continue on the path of accountability and excellence through the adoption of National Standards.

FISH! For Schools: Reigniting the Joy of Schooling

Building on the fun from the Opening Plenary session, come experience the optimism and explore how the renowned FISH! Philosophy is being used by schools across the U.S. to enhance and uplift classrooms and school cultures. Educators are dying to bring their passionate, authentic selves to their work. Unfortunately sometimes, their work often won't let them. Which is crazy, because the success of any school is based on the individual success of each person in that school or district. Choke personal creativity and you choke that schools chance to flourish.

We believe it's time to loosen up. Play more. Lift the lid on freedom and responsibility. When educators are genuinely engaged in the work they do—rather than just doing time—they become inspired to inspire. Once a school community develops a common language (FISH!) around a meaningful, motivating mission, the conversations shift to what's possible rather than “coulda, woulda, shoulda.” New attitudes develop. Performance improves. Students and parents notice. Trust increases. Everyone feels a creative reawakening and a renewed commitment to “who they're being while they're doing what they're doing.”

Speaker:

Andy Halper

Professor of Boredom Prevention (aka National Education Director)
ChartHouse Learning International

Wednesday

Concurrent Sessions

8:15–9:45 a.m.

Engaging Youth as Leaders: Best Practices and Impact

Young people deserve to be directly involved in shaping the policies that affect their lives, families and communities. Session participants will learn about implementing best practices in effective youth engagement; engaging diverse, low-income and immigrant youth; funding effective youth programs; developing youth philanthropy; and involving youth as leaders in organizations.

Facilitator:

Emma Banks

Youth Advisory Council
Vancouver Foundation

Speakers:

Ingrid Benedict

Coordinator
California Fund for Youth Organizing

Tommy Ramirez

California Fund for Youth Organizing

David Stewart

Youth Advisory Council
The Community Foundation for the National Capital Region

Karin E. Tice

Partner
Formative Evaluation Research Associates

Together Is Better: Regional Alliances and Community Foundation Sustainability

Can small community foundations achieve greater financial sustainability through regional alliances? A nationwide study, funded by the Aspen Institute and the Mott Foundation, set out to find the answer. Join leading community foundation experts to learn what they discovered-and explore the implications for your own foundation.

Speakers:

C. Patrick Babcock

Senior Policy Consultant
Public Policy Associates

Lucy Bernholz

President and Founder

Blueprint Research and Design, Inc.
Robert S. Collier
President and CEO
Council of Michigan Foundations

ETC! - Answers to your Burning Development/Donor Services Questions

So much expertise, so little time. This “close out” session offered last year was well received—informal and collegial. It offered participants a final opportunity to ask those questions to which they still needed answers. The very interactive format of this session is determined by the make-up of the participants. It may include one or more of the following: seating according to a foundation's asset size, the age of a foundation or size of staff. Representatives of various foundations will moderate large or small group conversation.

Facilitator:

Eric Anderson
Community Philanthropy Officer
The Minneapolis Foundation

After Disasters First Responders Leave....What Next?

Disasters can catch our communities unaware or unprepared to respond effectively. This interactive session explores innovative approaches to a community foundation's role in community disaster response. Panelists will also share their short and longer term experiences to convene, collaborate, partner and coordinate funding efforts in response to community disasters.

Speakers:

Nancy B. Anthony
Executive Director
Oklahoma City Community Foundation, Inc.

Richard J. Batyko
Vice President for Communications and Marketing
The Cleveland Foundation

W. Michael Bigner
Vice President for Program Services
Gulf Coast Community Foundation of Venice

Taking the Initiative: Efficiently Managing Special Initiatives

Community foundations use innovative strategies to address existing and emerging issues by convening diverse partners, resources and information, and by building support for initiating and sustaining the work. These leadership roles strain internal capacity and have few and limited revenue streams. This session shares potential tools to help community foundations with selecting, pricing and evaluating special initiatives.

Moderator:

Winsome Hawkins
Associate Director
Coalition of Community Foundations for Youth

Speakers:

Lesley Grady
Vice President
Community Foundation for Greater Atlanta

Lynette Lacy
President and CEO

Hutchinson Community Foundation

Jamal Powell

Boston Consulting Group

Mythbusters: The Misconceptions and Realities of Experiential Donor Engagement

In this session three experts with different vantage points on the individual donor landscape will provide their insight in a lively exchange to "bust" the myths of creating, running and sustaining experiential donor engagement in the community foundation setting.

Moderator:

Ted Lord

Partner, The Giving Practice

Philanthropy Northwest

Speakers:

Jessica Bearman

Deputy Director, New Ventures in Philanthropy

Forum of Regional Associations of Grantmakers

Tom Donlea

Director

Social Venture Partners International

Barbara Larson

Director of Donor Services

Community Foundation Silicon Valley

Online Activism and Democracy Efforts

The age of connectivity is reshaping America and having a profound impact on the culture and operations of civic organizations and issue campaigns. This session will explore the implications for philanthropy and specific ways that philanthropy can positively influence the field of on-line activism.

Speakers:

Allison Fine

CEO

E-Volve Foundation

Marcia Sharp

Principal

Millennium Communications Group, Inc.

Protecting You and Your Workforce: The Importance of Personnel Policies

Foundations have many constituencies: board, staff, donors and the community. To ensure transparency, compliance and consistency and to demonstrate good faith, foundations must adopt sound workforce policies. This session will concentrate on the law, standards and practices that affect employees. Participants will learn which policies to include in an employee handbook, how to get started, and where to get help. Sample policies will be shared.

Speakers:

Karen DeMers

Director of Administration

Community Foundation Silicon Valley

Leslie A. Dunford

Vice President for Corporate Governance

The Cleveland Foundation

Richard Hammond

Vice President of Human Resources Services
Washington Employer's Association

Partnering for Policy Impact—Community Foundations and Nonprofits Associations

This interactive session will highlight case stories of successful—and replicable—partnerships between community foundations and nonprofit associations on public policy. The discussion will advance staff and board members' understanding of opportunities community foundations have to shape public policy through both their grantmaking and their community leadership.

Speakers:

Gita Gulati-Partee

Consultant
OpenSource Leadership Strategies

Erica Greeley

Director of Strategic Policy Planning
National Council of Nonprofit Associations

Closing Plenary Lunch

“Community Foundations: Mobilizing Knowledge to Achieve Social Change”

Avila Kilmurray, Director, Community Foundation for Northern Ireland

This summer, headlines throughout the world told of the Irish Republican Army's vow to disarm and renounce violence. Some voices were skeptical, but many expressed hope that their divided community was at last moving away from conflict and toward healing and peace. In Northern Ireland, it was a community foundation—undercapitalized but full of courage and aspiration, and led by the extraordinary Avila Kilmurray—that contributed to the building of peace by activating support groups for victims of violence and developing measures for reintegrating political ex-prisoners from all sides in the conflict. This session will explore more about the controversial work that found common ground among traumatized victims and created a new community—and demonstrated for all of us the powerful impact a community foundation can have through leadership, knowledge and mobilization of local networks.