



Community Foundation Fundamentals Course

March 30-31, 2015

Philanthropy Southwest

Communities Foundation of Texas/Mabel Peters Caruth Center

Monday, March 30, 2015

8:00 am – 8:30 am	Continental Breakfast
8:30 am – 9:45 am	Welcome, Overview and Introductions <ul style="list-style-type: none"> • Overview • National Standards for U.S. Community Foundations • Activity: Class introductions
9:45 am – 10:00 am	Break
10:00 am – 12:00 pm	Chapter 1: Community Foundation Movement <ul style="list-style-type: none"> • History • Traditional and emerging roles • Unique characteristics • Activity: What is a Community Foundation? What is its Mission Statement? • Future trends • National standards • Activity: Community Foundation Scenarios
12:00 pm – 12:30 pm	Lunch
12:30 pm - 1:00 pm	Chapter 2: Governance and Board Composition <ul style="list-style-type: none"> • Activity: Fickle Finger of Fate – What Do Boards Do?
1:00 pm – 2:00 pm	Chapter 2: Governance and Board Composition (Cont.) <ul style="list-style-type: none"> • Board role and responsibilities • Effective meetings
2:00 pm – 2:15 pm	Break
2:15 pm – 3:15 pm	Chapter 3: Resource Development - Donors <ul style="list-style-type: none"> • Why donors give to community foundations • Activity: Defining the Motivation of Donors
3:15 pm – 4:45 pm	Chapter 3: Resource Development –Gifts <ul style="list-style-type: none"> • Types of gifts • Activity: What’s wrong with this gift? • Gift Acceptance and agreements • Planned giving • Activity: Name that gift!
4:45 pm – 5:00 pm	Wrap Up



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Tuesday, March 31, 2015

7:30 am – 8:00 am	Continental Breakfast
8:00 am – 9:45 am	Chapter 4: Resource Development - Donor Relations & Attracting Gifts <ul style="list-style-type: none"> • How foundations attract gifts • Strategic Development Plan • Services to donors and advisors • Activity: Cutting Edge Donor Services • Marketing and communications • Activity: Tugs and Pulls / Balancing Competing Interests
9:45 am – 10:00 am	Break
10:00 am – 11:30 am	Chapter 5: Legal and Legislative Issues <ul style="list-style-type: none"> • Understanding the Nonprofit Universe • Legal Restrictions vs. Donor Control: Donors • Legal Restrictions vs. Donor Control: Agencies • State Law: UMIFA & UPMIFA • Grantmaking Pitfalls • Legislative Update
11:30 am – 12:00 pm	Lunch
12:00 pm – 1:00 pm	Chapter 6: Stewardship, Accountability and Fiduciary Responsibilities (Part I) <ul style="list-style-type: none"> • Stewardship • Fiscal Accountability • Activity: What could possibly go wrong? • Fiscal Policies • Finance/Investment Committee • Communicating Investment & Financial Decisions
1:00 pm – 2:15 pm	Chapter 6: Stewardship, Accountability and Fiduciary Responsibilities (Part II) <ul style="list-style-type: none"> • Asset Allocation • Spending Rate • Operating budget • Staffing: What's the right mix? • Conflict of Interest • Activity: Conflict of Interest
2:15 pm – 2:30 pm	Break



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2:30 pm – 3:45 pm	Chapter 7: Grantmaking & Community Leadership (Part I) <ul style="list-style-type: none"> • Setting grantmaking priorities • Grantmaking styles • Types of grants • Internal process/plan • External Clarity: communicating grantmaking priorities • Activity: Review Grant Request
3:45 pm – 5:00 pm	Chapter 7: Grantmaking & Community Leadership (Part II) <ul style="list-style-type: none"> • What CFs Bring to the Leadership Table • Considering all assets when leading • Leadership Roles • Strategic assessment and planning • Leadership, diversity and inclusiveness • Activity: Community Leadership
5:00 pm – 5:15 pm	Wrap Up and Adjourn