Kansas Association of Community Foundations

CELEBRATING 10 YEARS!

KACF 10th Anniversary Highlights Report

Dear KACF Members,

In August 2004, I left a 20-year career in public relations to become the executive director of the Derby Community Foundation. I brought to this new job a love of my community (Derby's been my home for 38 years) and a desire to elevate the quality of life in our community. What I lacked was any knowledge of the function or role of a community foundation. Thankfully, the Kansas Association of Community Foundations was "born" the following year and suddenly I had a wealth of knowledge, expertise and resources at my fingertips! In fact, I often tell people that it seemed like KACF was created just for me!

During the past 10 years, KACF has been a lifeline for the Derby CF—providing guidance, expertise and professional development that helped to increase our assets, refine our mission, and better serve our donors and community. For me personally, KACF has been invaluable—providing a connection to colleagues across Kansas and access to professional development experiences.

KACF is a unique organization—there is really nothing like it in the nation. Representatives of CFs from other states often express amazement at the scope of resources provided by KACF.

So as we celebrate the 10th anniversary of KACF, let us take pride in the achievements of our organization while also looking forward to all that KACF can become in the next 10 years.

Theresa A. Hearn
Chair, KACF Board of Directors

P.S. I remember reading the news release announcing the hiring of Svetlana Hutfles as the KACF Executive Director and wondering "how in the world did we find someone with such impressive, international credentials in Kansas?" The original KACF board made a wise decision when hiring her. KACF is indebted to Svetlana for her vision, enthusiasm and true belief in the power of philanthropy.

Dear KACF Members,

Together we have reached a new milestone in developing philanthropy in Kansas: your community foundations have grown and KACF has evolved with you. This progress would have not been possible without your hard work, dedication of KACF Board, Committees, Faculty, service providers and other paid experts and volunteers involved. I am eternally indebted to Gabriel Works at Works Associates, KACF Program Expert, for helping us reach the heights admired not only by KACF Members but also peers all over the United States and abroad. KACF is particularly grateful to our current and past leaders and the generous support of the Kansas Health Foundation – true visionaries who recognized the importance of CFs in building stronger communities.

KACF is an evolving organization. We have only "scratched" the surface of our potential. This report offers you highlights of our past activities. Looking into the future, I am confident that with the leadership of Theresa Hearn and other bright dedicated hearts to follow, KACF will continue providing valuable, timely assistance to its Members and will excel as a true network of peers helping each other grow. We are stronger with the Association!

Svetlana Hutfles
KACF Executive Director

P.S. KACF would have not soared without the leadership of Aubrey Abbott Patterson, Executive Director of the Hutchinson Community Foundation, which serves as the fiscal agent for KACF. Thanks to Aubrey, the Hutchinson CF Board and staff for their stewardship and support.

THE MISSION

The mission of the Kansas Association of Community Foundations is to leverage the resources of community foundations in the State of Kansas to strengthen and promote community philanthropy and to inspire the quality of life in Kansas communities.

KACF MEMBERSHIP

KACF AT A GLANCE

- Yearly membership growth
- Dedicated Board and Committees
- Increased reputational capital of KACF as evidenced by increased usage of KACF resources by CFs within and outside the borders of Kansas
- Lean, flexible business model with a strong system of outsourcing
- An increasingly robust "go to" resource for Kansas CFs, with resources ranging from organizational practices to on-going state-wide marketing campaign
- Successful field wide educational, advocacy, and marketing efforts
- Effective member online resources
- Organizational resources with expertise, equipment and software to conduct business and trainings
- Deepening culture of member participation in KACF governance and programs
- Pursuit of KACF sustainability

$5.5 M have been attracted by KACF since inception to strengthen the field of philanthropy in Kansas and to support community foundations.

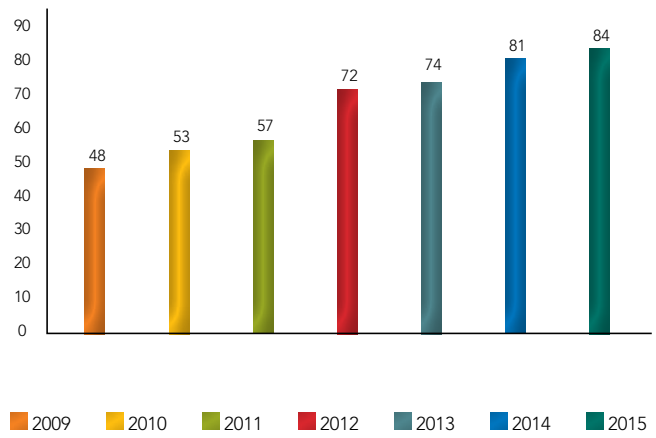
KACF is grateful for the continued support of the Kansas Health Foundation

MEMBERS SAY:

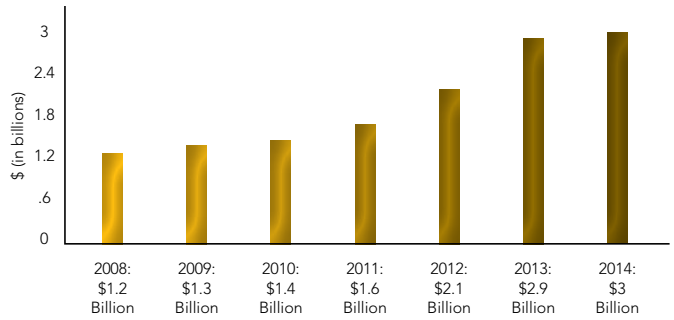
"Your work always exceeds the vision that I have for KACF. I think the organization is becoming indispensable to the foundations in Kansas."

"Thank you for your efforts to continue to make KACF relevant, attentive to the needs of the membership and flexible in how we can help."

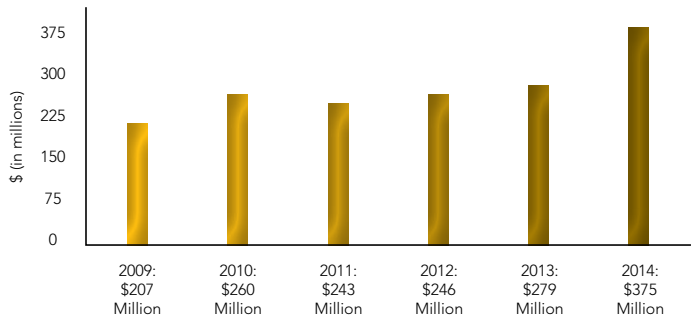
KACF MEMBERSHIP
2009-2015



KACF MEMBERS' ASSETS



KACF MEMBERS' GRANTS



KACF PROGRAMS

Bryan Clontz Charitable Solutions, LLC presenting at the statewide training in Topeka, Kansas

IN-PERSON TRAINING SESSIONS

24 In-Person Training Sessions for KACF membership on critical topics for CF development. To provide resources in addressing the evolving needs of local community foundations, a few workshops were recorded and are available to KACF members on the KACF website:

- Exploring Alliances and Collaborations
- Building Unrestricted and Operational Endowments
- Endowment Building & Leadership (3 locations)
- Financial Leadership for Community Foundations (3 locations)
- Professional Advisor Program on Steroids (3 locations)
- Goldmines and Landmines of Asset Development (3 locations)
- Transfer of Wealth Marketing, Donor Development, and FIMS Training (3 locations)
- Donor Development: Friend-raising vs. Fund-raising (3 locations)
- Tips & Tricks for Community Foundations using FIMS
- Administrative Endowment Building for Community Foundation Board Members
- Four Operating Models of CFs
- Gifts of land and other non-cash assets

MEMBERS SAY:

"I came away from the regional meeting with several creative ideas that have proven successful at other Foundations."

"I am not a big fan of webinars—I am a "face to face" person and truly cherish interpersonal communication. However, I so appreciate the webinars provided by KACF. I guess you can teach an old dog new tricks!"

WEBINARS

24 Webinars were designed as just-in-time training resources in response to membership time and travel restrictions and are available on the KACF website:

- Paths to sustainability
- Conversation with donors
- Operations in a small shop
- Building the best board
- Community foundation collaboration
- Community foundation leadership
- Disaster planning
- Evaluating your CEO
- Tactics for building endowment
- Three things every board member should know about asset development
- Why endowments and sustainability are important
- CLE credits for professional advisors
- The three legal duties of a nonprofit board. Something every board member should know
- Resources for community foundations facing adaptive challenges
- Are we doing it right? Money, management and survival
- Reports from the COF Fall Conference for community foundations
- Enhanced asset development strategies: taking your small/new community foundation to the next level
- Elements of a highly productive board meeting
- Building the best board
- Talking to donors in times of economic uncertainty
- Technical assistance services
- Give Local America
- Report from the COF Fall Conference for CFs
- National Standards and other news from the COF Conference

KACF PROGRAMS

INFORMATION MANAGEMENT TRAINING PROGRAM

Being knowledgeable about and up-to-date on IM software is an important component to CF sustainability. In response, KACF has offered funding to keep CFs' staff trained and up-to-date on information management software (funds, gifts, grants, and donor information).

$70 K invested in 16 participating CFs

COUNCIL ON FOUNDATIONS CONFERENCE FELLOWSHIP

The annual COF training for CFs is the largest professional development and peer-learning event in the USA. The fellowship program offered funding for Kansas CF staff to participate in this important learning exchange. Fellowship recipients present at a webinar to share their top learnings with Kansas membership.

$17.6 K invested in 9 fellowship recipients from Kansas

Peer learning event in Wamego, Kansas

PEER LEARNING AND PROJECTS

Peer learning activities provide a platform for CFs to build relationships with each other, share and learn sustainable region-specific practices, and to leverage resources for addressing daunting challenges regionally.

Regional liaisons:
Ryan Roberts, Scott CF (Region I: Western KS)
Angie Tatro, Central Kansas CF (Region II: South Central and Southeast KS)
Vern Henricks, Greater Manhattan CF (Region III: North Central and Northeast KS)

$63.5 K invested in regional activities:

- Building alliances, board responsibilities, Transfer of Wealth, and sustainability – two-day event in Garden City with dinner, round table discussions and educational ice-breaking games for board members and staff in the region
- Executive directors' round-table discussion and a relationship building mini-bus tour of bronze sculptures in Derby
- Peer learning "Out of the hat" event and wine-tasting in Wamego.
- Collaboration planning event in Fredonia
- Professional advisor "engagement" networking and peer learning in Western Kansas.
- Peer networking golfing event and a program on relationship building with professional advisors at the Prairie Band Casino
- Cover your Acres outreach to farmers in Western Kansas
- CF brochures in Western Kansas
- Radio Kansas commercials in Central Kansas and Southeast Kansas
- Funeral home director packets
- Presentations at the Association of Funeral Home Directors regional chapterS
- Effective Grantmaking peer exchange in Topeka
- CF ads in regional newspapers for South Central and Southeast Kansas Region
- Three educational sessions in Western Kansas
- Keep 5 in Kansas banner for public events in Southeast Kansas
- Professional advisor continued education seminar in Topeka, Lawrence and Manhattan

MEMBERS SAY:

"Because of the IM training, we have seen an increase in productivity for the administrative staff and a reduction in errors because we are only entering information once."

"I have my "to do" list made at the COF Conference and have already started visiting with our board members about changes I hope we can implement that will help strengthen our Foundation!"

"It is our opinion this peer exchange was extremely effective and an enormous benefit to our Foundation. Thank you for offering this program."

"I learned more in the 45 minutes that we spoke than I did all last week about what a foundation does and what to focus my efforts towards."

Bob Muirhead KACF Vice-Chair presenting at the PA event for Electric Cooperatives in Wichita, Kansas

MEMBERS SAY:

"I learned a lot and felt the training was thought provoking and I liked that we walked away with a DVD that we can really use immediately in making contact with professional advisors."

"There is so much insight, knowledge and information on this DVD, it is incredible. Pete and Bryan help make sense out of all the information and the case studies are invaluable. I can't wait to share this with advisors in my area".

"I found this resource for professional advisors EXTREMELY helpful. We are planning our 3rd annual professional advisor's seminar for November and I really appreciate this insight."

PROFESSIONAL ADVISOR PROGRAM

Experience across the country shows that large endowment gifts to community foundations almost always come in through connections to professional advisors (PAs). Thus, building solid relationships with PAs is an important step in CFs' endowment building.

KACF:

- Educated CFs on building relationships with PAs through webinar, on-site training and DVD, and on-line resources
- Created resources for PAs on the KACF website
- Produced video resources online and on CDs distributed to all members for PAs (the case studies section qualifies for continued legal education credits)
- Established valuable connections with Kansas PAs such as Kansas Bankers Association, Kansas BAR Association, Farm Bureau, Funeral Home Directors Association, Kansas League of Municipalities, Electric Cooperative and others
- Funded events for PAs though GROW II funding to participating CFs and peer-learning dollars
- Presented at PA events, including conferences for electric cooperatives, funeral home directors, farmers, city administrators and county commissioners. KACF is expected to present to the Kansas BAR Association in November of 2015.

KACF PROGRAMS

Joe Lumarda, Capital Group, CA at the KACF Conference Plenary in Wichita, Kansas.

ANNUAL CONFERENCE

The Annual Conference is the premier KACF educational and networking event designed specifically for small rural and growing urban community foundations, offering basic and advanced tracks in all major areas of CF management such as legal, asset development, marketing, program, finance, governance, national standards, public policy, and leadership.

- $410 K invested
- 12 plenaries
- 168 sessions
- 201 speakers (63 National speakers and 138 Kansas speakers)
- 417 attendees (excluding 2015 data)
- 87 foundations (excluding 2015 data)

MEMBERS SAY:

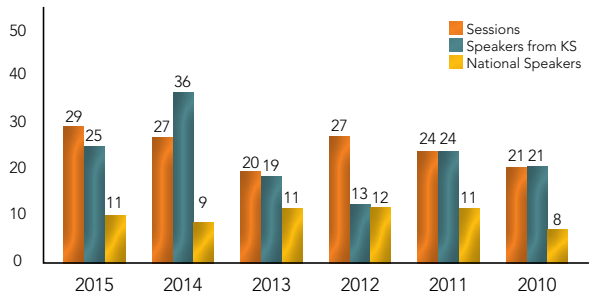
"I always look forward to the KACF conference because I learn so much, not just from the sessions but from networking with my colleagues. I am truly grateful for KACF and the many benefits our community foundation has received via membership."

NATIONAL EXPERTS SAY:

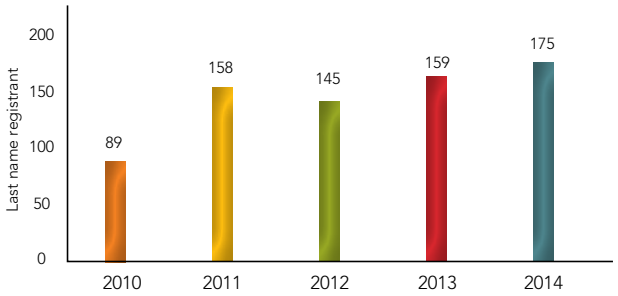
"I also want to compliment you on the conference itself, which was one of the best organized and most substantive I have attended in years. I went straight from Wichita to Como, Italy, for the WINGS conference, and was able to share with a number of worldwide colleagues the quality of program I had just witnessed in Kansas."

-Shannon E. St. John, Senior Advisor, The Synergos Institute

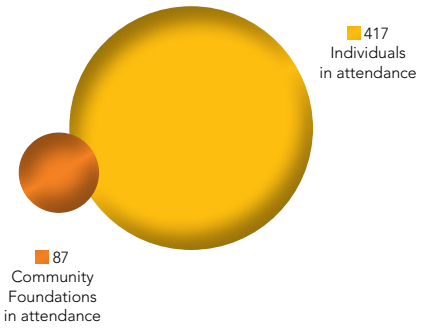
KACF ANNUAL CONFERENCE
SESSIONS & SPEAKERS 2010-2015



TOTAL CONFERENCE ATTENDANCE BY YEAR



KACF ANNUAL CONFERENCE ATTENDANCE
FOUNDATIONS & INDIVIDUALS 2010-2014



KACF PROGRAMS

MEMBERS SAY:

"KACF Technical Assistance is like having another staff member! Thank you to KACF for putting this programming together."

"TA expert was able to tell them the same things that I have been for the past two years and it finally clicked. I just cannot say enough positive things about the whole experience."

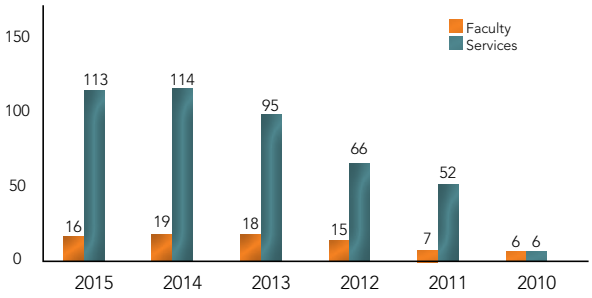
"Thank you for this opportunity. I believe the TA time for our community foundation last fall was pivotal in our turn around!"

GROW II TECHNICAL ASSISTANCE

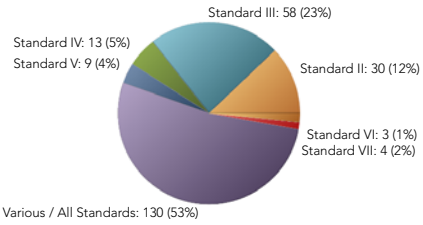
Since 2010 Kansas Health Foundation supported KACF in offering the 39 GROW II grantees a flexible "menu" of services that included on-site and virtual training and follow-up support from regional and nationally recognized CF experts on KACF Faculty. The TA Menu System was tailored to meet individual GROW II grantees' needs. In one year alone, 2014 TA Menu included 114 options, each corresponding to a specific National Standard. In addition, KACF offered a "success fund" to those CFs that needed further assistance to meet their annual GROW II goals.

- $747 K invested
- 27 Faculty Consultants
- 440 services
- 39 GROW II CFs

GROW II TECHNICAL ASSISTANCE
NUMBER OF FACULTY & SERVICES 2010-2015

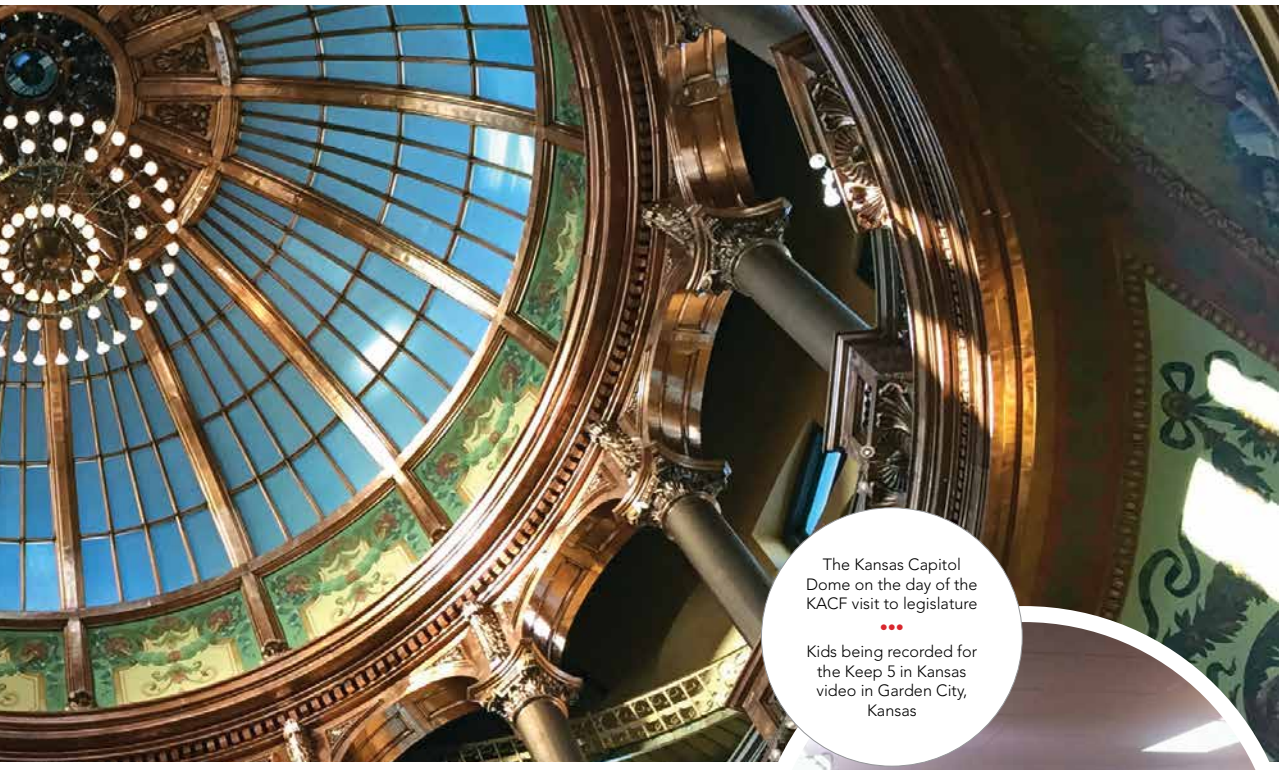


TECHNICAL ASSISTANCE
SELECTIONS BY STANDARDS
2010-2015



Standard II: Mission, Structure and Governance; **Standard III:** Resource Development; **Standard IV:** Stewardship and Accountability; **Standard V:** Grantmaking and Community Leadership; **Standard VI:** Donor Relations; **Standard VII:** Communications

KACF PROGRAMS



The Kansas Capitol Dome on the day of the KACF visit to legislature

•••

Kids being recorded for the Keep 5 in Kansas video in Garden City, Kansas

WEB RESOURCES are just-in-time resource materials on topics important to growing Kansas membership available in the member resources section of the KACF website:

- 700 resource materials for CFs (sample documents, videos, webinars, etc.)
- 131 Discussion Chamber questions archived
- 338 answers provided to peers by Kansas peers and KACF Faculty on the Discussion Chamber

MARKETING

KACF leveraged its position to provide marketing and research to raise visibility of Kansas CFs in statewide and regional markets.

$351 K Invested:

- Farmers and Ranchers Market Research
- Transfer of Wealth Research and Revision
- Keep 5 in Kansas Campaign, website, video and customizable materials
- Radio Kansas Commercials
- Advertisement in 147 newspapers
- TV advertisement
- Web presence
- Facebook posts and boosts
- KANSAS! Magazine, McCain Brochure; Lead Center Program; Country Living Magazine; Kansas; Government Journal.

ADVOCACY

Kansas legislation can have a big effect on our CF members and their communities. KACF monitors and advocates for its members as well as keeps abreast of developments with a lobbyist.

- Representation of CFs at state-wide events
- Tax credits definition changed to include CF endowments
- Legislative receptions
- Monitoring of legislative sessions and reporting to members

MEMBERS SAY:

"We saw one of the ads on T.V. the other evening and it was impressive. I was very pleased that such a campaign was being conducted. It will reach a lot of people who have no idea community foundations exist."

"I enjoyed seeing this TV ad during the 10:00 pm news on channel 10 KAKE News. Good placement!"

"We received a $10,000 gift today because one local lady read the Keep 5 ad in the Winfield Courier and it inspired her to make a gift now. This is wonderful and promising connection for us. Thanks to KACF for doing the ad!"

BUDGET

KACF BUDGET TO ACTUAL 2015

All current KACF programs and administrative expenses are paid by two five-year grants from the Kansas Health Foundation with the exception of advocacy work funded by membership fees. Earlier reports can be found on the KACF website in the member section.

KACF 2015 BUDGET TO ACTUAL

As of 08/31/2015

		2014 Ending	2015 Income	2015 Total Available	2015 Expense	Remaining
0	2013-2017 KHF Grant #200701002D-1B	178,743.59	445,285.10	624,028.69	187,352.71	436,675.98
1	Membership Dues, Registration fees, exhibitors and other contributions to KACF	119,107.52	40,875.60	159,983.12	2,831.88	157,151.24
2	2008-2011 KHF Grant 1999120151-1	20.17		20.17		20.17
3	Compassion KS	914.00		914.00		914.00
4	Grow II Technology Fund 2007-2009	10,017.16		10,017.16	161.48	9,855.68
8	Endowment	90,421.73	2,334.59	92,756.32	-	92,756.32
9	2011- 2012 Grant # 200701002D-1	70,882.85	63,631.89	134,514.74	36,172.52	98,342.22
	Total	**470,107.02**	**552,127.18**	**1,022,234.20**	**226,518.59**	**795,715.61**

Exp	Line item	2014 Remaining	2015 Budget	2015 Total Budget	Acutal	Remaining
Direct TA	Menu of TA services inc. Faculty fees for GROW II Grantees	37,836.71	97,500.00	135,336.71	40,590.00	94,746.71
	Success Fund (incl. additional direct assistance to struggling GROW II grantees, webianrs, etc.)	14,300.00	25,000.00	39,300.00	6,800.00	32,500.00
	Program Assistance and Evaluations	-	20,000.00	20,000.00	20,000.00	-
Annual Conference	Speaker Fees and expenses	16,477.12	23,000.00	39,477.12	3,460.13	36,016.99
	Conference meeting rooms, incl. exhibit tables with electricity, internet	3,485.00	1,987.00	5,472.00	-	5,472.00
	Hotel rooms (80) CFs	-	-	-	-	-
	Food and beverages (200 people one lunch and one breakfast only)	-	17,505.00	17,505.00	-	17,505.00
	Event Planner	-	20,500.00	20,500.00	-	20,500.00
	A/V expenses (NO audio recording)	(3,336.66)	8,906.96	5,570.30	-	5,570.30
	Program assistance and Evaluations	-	20,000.00	20,000.00	-	20,000.00
	Copying and printing	1,492.17	2,546.00	4,038.17	-	4,038.17
	Supplies (badges, ribbons, folders, easels, etc)	666.65	1,187.00	1,853.65	-	1,853.65
	Marketing	-	2,000.00	2,000.00	1,750.00	250.00
	Miscellaneous	9,139.00	4,915.00	14,054.00	-	14,054.00
State-wide training	Presenter fees ($5,000) and expenses ($1,200)	6,400.76	-	6,400.76	3,235.48	3,165.28
	Room rental, A/V, food and beverages, etc	7,500.29	-	7,500.29	1,737.87	5,762.42
	Marketing and CF based event planning support incl. name tags, invitations, materials,etc	6,343.00	-	6,343.00	1,049.07	5,293.93
	Program Assistance and Evaluations	-	-	-	-	-
Peer Learning & Projects - Incl. communication, mkting, travel, meals, facility, supplies, a/v, print, fees, etc.		23,210.15	15,000.00	38,210.15	5,751.56	32,458.59
Information Management - Reimbursement for fees & expenses $1,500 per 13 CFs in 2013		13,198.34	13,000.00	26,198.34	-	26,198.34
COF Fellowship		-	2,000.00	2,000.00	2,000.00	-
Professional Advisor Program		16,000.00	6,000.00	22,000.00	-	22,000.00
	Total Programs	**152,712.53**	**281,046.96**	**433,759.49**	**86,374.11**	**347,385.38**
KHF Approved Extended Programs	Grow II Technology Fund 2007-2009	**10,017.16**	**-**	**10,017.16**	**161.48**	**9,855.68**
	Transfer of Wealth & CF Marketing - Additional Print Ads	(17,063.78)	42,528.41	25,464.63	8,510.00	16,954.63
	KACF Annual Conference (session recording, vimeo, upload, flash drives plenary lunch & dinner	20,965.65	21,103.47	42,069.12	1,825.00	40,244.12
	KACF Equipment	6,960.98	-	6,960.98	3,429.15	3,531.83
	Give Local America Kimbia Web Platform ($10,000 per 10 CF hubs) NOW CONSULTING & DEVELOPMENT	60,020.00	-	60,020.00	22,408.37	37,611.63
	Total Extended Programs	**70,882.85**	**63,631.88**	**134,514.73**	**36,172.52**	**98,342.21**
Compensation	KACF Director Salary	(0.06)	86,945.00	86,944.94	57,963.26	28,981.68
	FICA	-	6,926.69	6,926.69	4,525.99	2,400.70
	Workers Comp & Employee Practice Insurance	146.53	403.42	549.95	-	549.95
	Simple IRA contribution	(0.03)	2,608.35	2,608.32	1,738.88	869.44
	Cash in Lieu of health benefits	-	3,600.00	3,600.00	2,400.00	1,200.00
	Unemployment tax	148.70	260.83	409.53	70.80	338.73
Operations	Travel inc. meals, mileage, hotel, board travel, miscellaneous	4,124.16	8,000.00	12,124.16	4,604.90	7,519.26
	Professional Development and KACF Promotion	2,867.19	12,000.00	14,867.19	7,878.21	6,988.98
	Professional Dues	1,525.00	1,050.00	2,575.00	325.00	2,250.00
	Subscriptions, software renewals	(205.29)	450.00	244.71	168.00	76.71
	Insurance DO Business Practice	(265.37)	838.24	572.87	-	572.87
	Telephone and Internet	471.85	2,800.00	3,271.85	1,657.31	1,614.54
	Copy/print	4,000.00	2,000.00	6,000.00	242.34	5,757.66
	Postage	662.82	350.00	1,012.82	11.24	1,001.58
	Stationary	35.76	150.00	185.76	-	185.76
	Supplies	777.22	1,100.00	1,877.22	-	1,877.22
	Website	-	-	-	-	-
	Annual Web hosting & domain	300.00	600.00	900.00	600.00	300.00
	Web updates and enhancements	6,000.00	3,000.00	9,000.00	100.00	8,900.00
	IT and Marketing support	4,632.59	3,000.00	7,632.59	-	7,632.59
	Equipment	500.00	250.00	750.00	-	750.00
	Miscellaneous	310.00	200.00	510.00	222.27	287.73
	Total Compensation and Operations	**26,031.07**	**136,532.53**	**162,563.60**	**82,508.20**	**80,055.40**
	Fiscal Support - HCF Administrative Fees		**27,705.60**	**27,705.60**	**18,470.40**	**9,235.20**
	Lobbying and Fees			159,983.12	2,831.88	157,151.24
2015 Total Expense Budget to Actual		**259,643.61**	**508,916.97**	**928,543.70**	**226,518.59**	**702,025.11**

KACF BOARD MEMBERS

KACF THANKS PAST AND CURRENT KACF BOARD MEMBERS

Chip Blaser, Douglas County Community Foundation

Kim Clark, Community Foundation of Southeast Kansas

Janie DeVore Gillis, Coffeyville Area Community Foundation

Catherine Domsch, Bird City Century II Community Foundation

Becky Goss, McPherson County Community Foundation

Lori Huber, Washington County Community Foundation

Kristine Meyer, The Community Foundation of Dickinson County

Pam Moore, Legacy, a Regional Community Foundation

Aubrey Abbott Patterson, Hutchinson Community Foundation

Sarah Saueressig, Greater Manhattan Community Foundation

Christy Tustin, Golden Belt Community Foundation

Denise Unruh, South Central Community Foundation

Betsy Wearing, Greater Salina Community Foundation

Shea Sinclair, Western Kansas Community Foundation

Brenda Chumley, Greater Kansas City Community Foundation

Pat Hamit, Community Foundation of Southwest Kansas

Angela Mueller, Russell County Area Community Foundation

Bob Muirhead, Heartland Community Foundation

Sandra Fruit, Central Kansas Community Foundation

Liz Workman, Greater Manhattan Community Foundation

Roger Viola, Topeka Community Foundation

Theresa Hearn, Derby Community Foundation

Shirley Antes, Emporia Community Foundation

Cathy White, Community Foundation of Southeast Kansas

Kirk Olomon, Commerce Bank, Garden City

Bekki Pribil, South Central Community Foundation

MEMBERS SAY:

"The response I've received when interacting with EDs from community foundations in other parts of the country has been one of awe at what Kansas has in KACF. It's nice to know that KACF can be a "beacon of light" for other states..."

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