



Annual Conference of the Kansas Association of Community Foundations

September 29 and 30, 2014

Wichita Marriott Hotel
9100 Corporate Hills Drive, Wichita, KS 67207

Building on Our Success – What’s Next?

Day 1 – September 29, 2014

9:30

Registration Opens

10:00 – 11:30

Pre-Conference Workshop

Basic Tips and Resources for New Executive Directors and Board Members

Shirley Antes, Sandi Fruit, Vern Hendricks & Troy Unruh
Atrium

This session provides an opportunity for executive directors and board members to become more familiar with some of the tips and resources used by other community foundation leaders. Session leaders from Kansas community foundations will provide information and resources that help them be more efficient in their day-to-day activities and participants will have the opportunity to ask panelists how they handle and oversee various components of the operations within their own foundation.

12:00 – 1:15

Lunch Plenary

Salons D-E

Merging Money and Mission: Where We’ve Been, Where We Are Going

Jennifer Leonard

Communities have never needed leadership more, and our foundations are ably positioned to provide it – not just through grants and programmatic initiatives, but as flexible fundraisers. From our roots as trust administrators we have exploded into

roles as online giving promoters, state and federal grantees, disaster relief centers, fiscal sponsors and even traditional endowment campaigners. Have we become the community's development office?

1:35 - 2:50

Session 1A

1. Community Foundation Bootcamp Part 1 - Asset Development Primer – Fundamentals Track

Judy Sjostedt
Salons A-C

This session is an adventurous retreat that includes meditation, healthy food, relaxation & pampering - all set on a beautiful beach... don't you wish? Asset Development Readiness is an intensive 75-minute session designed to fill your head with the essentials of resource development and to jump start your fund development engine. Includes such topics as - asset development versus fundraising and marketing; gift types; fund types; cultivation, development and stewardship needs of donors, etc.

2. Engaged Board Members Make the Best Ambassadors - Advanced

Jennifer Leonard
Salon F

Excited, informed board members can connect your foundation to prospective donors, community needs and smart management practices. What should be in your board engagement toolkit? Consider sharing your own worst mistake (the speaker will!) and reflect on the continuum of board involvement, education and leadership.

3. Transfer of Wealth With Roots: Instead of Thinking "Outside the Box", Why Not Think "Inside the Triangle"?

Pete Peterson & Lonnie Steiben
Atrium

Answering the tough questions: In actual practice, what policies, strategies, and tactics have the best chance of smoothing and nurturing the sometimes uneasy relationships between donors, "destination" charities, advisors, and community foundations, such that a community's retention of potential Transfer of Wealth assets becomes more reality than dream?

4. Strategies for Engaging Civic Partners

Don Nigus, Case Woods & Shirley Antes
Salon 1

Economic Development can mean many things to many people and there are many ways to engage communities in solving local needs. By engaging various partners in economic development activities, we create new conversations that have the capacity to alter the future and restore sustainable local business and industry. This session will focus on ways two different communities have engaged civic partners through their various relationships including their local community foundation.

2:50 - 3:20

Healthy Snack Social

3:20 – 4:20

Session 1B

1. GROW II: Tips for Making the Best Match – Fundamentals Track

Theresa Hearn, Steve Noble, Shea Sinclair & Cathy White
Salons A-C

Come hear this panel describe what worked to raise the important matches for GROW II. The panel will share best practices that you can adapt for your community foundation.

2. Don't Sell the Farm! One Community Foundation's Strategy to Keep and Manage Gifts of Farmland - Advanced

Diana Anderson
Atrium

The Southwest Initiative Foundation (SWIF) in Hutchinson, Minnesota, is breaking the rules when it comes to gifts of real estate – specifically gifts of farmland. Rather than convert the dirt to dollars, SWIF is keeping and managing farmland and using the income to carry out the donor's charitable intent. It's an idea that appeals to donors and has resulted in farmland gifts totaling more than \$7 million to date. Learn how one community foundation set up their farmland retention program – from marketing to management and everything in between.

3. Fear No Reporter! How Community Foundation Leaders Can Win With Media to Improve Community Health and Economic Development.

Blythe Thomas
Salon F

If you're great at building coalitions, recruiting volunteers and engaging donors, but you're ignoring the media, you're missing a valuable tool in your toolbox. Join us for an interactive session to learn why media matters, who these mysterious creatures (reporters) are, the influence of media in your community and how successful communications strategies tie directly to your development plan. No experience? New to philanthropy? No problem. The Kansas Health Foundation's VP of Communications will leave you with tips, tricks, and even a story or two about her experiences with media gurus like David Letterman and Martha Stewart. Come prepared for a whole new way of looking at your local newspapers, radio stations and TV broadcasters.

4. HR 101: Basic HR Principles for Community Foundations

Shelly Prichard, WilliamTretbar, & Lisa Wood
Salon 1

Community foundations have great impact in their communities, and are often so busy doing good work that they may not have taken care of the internal work of establishing solid policies regarding Human Resources management. Learn how to, and why you should, implement HR practices in your organization. Discuss the basics of overtime, personnel policies, managing payroll, benefits, performance reviews, and how to stay current on regulations. Bring your challenging issues and burning questions to receive applicable advice for how to best support your team.

4:20 - 4:35

Break

4:35 - 5:35

Session 1C

1. Community Foundation Bootcamp Part 2 - Governance & Legal Fundamentals – Fundamentals Track

Judy Sjostedt
Salons A-C

Whether you need a refresher or a primer, this session aims to increase your awareness of the core matters essential to a Foundation's organizational and legal fitness to prepare it for a productive and perpetual existence! Includes an overview of such topics as – nonprofit board responsibilities; what's a

fiduciary; key laws of which to be aware (and compliant!); pitfalls to avoid; conflicts of interest; confidentiality; variance power usage, etc.

2. Community Foundations Trends and Best Practices

Suzanne S. Friday & Lara Kalwinski

Atrium

This session will highlight key issues facing community foundations including scholarship funds and agency endowments and will explain how the Community Foundations National Standards program at the Council on Foundations is used to educate community foundations about best practices and promote self-regulation among this key component of the philanthropy sector.

3. Shoot Ready Aim: Are Our Investments Missing the Target?

David Bromelkamp, Henry A. Bromelkamp & Mike Greim

Salon F

Maybe your foundation has its money in a safe place: whew. Maybe your foundation is always spotting a hot investment opportunity: let's grab it! If you don't do planning, there will always be inefficiencies, missteps, or even imprudent decisions. Investing the foundation's money depends on a well-written investment policy, which results in more focused results, clearer roles, and measurable outcomes. Law requires you to be prudent investors. Learn some best practices to plan and implement your investment policy: local partnerships, diversification of investment advisors. Investments are supposed to support the purpose of the organization. It's all about growing your investments with responsible stewardship. Feel free to contact the presenters before the conference with situations that might be good (anonymous) case studies for the discussion.

4. Grantmaking for Impact: Stories From the Field

Sharon Long, Shelly Pritchard & Troy Unruh

Salon 1

Most community foundations operate a grantmaking program that can be characterized as "responsive" to the needs identified

through the grant application process. One may ask if this approach is the most effective use of the philanthropic dollars. Hear three Kansas stories of moving to bold grantmaking strategies and/or smart grantmaking processes that may have better impacts for their communities.

5. Consultation with Diane Anderson, Southwest Initiative Foundation

Sedgwick

6:00

Dinner, KACF Annual Meeting

Salons D-E

Day 2 – September 30, 2014

7:15 – 8:00

Breakfast

Salons D-E

Roundtables

Choose the table that matches your interest and be ready to meet your peers, share your experience, and get answers to your questions.

- Community Foundation Boards
- Program Officers
- Community Foundation Directors
- Finance/Administration/Technology
- Judy Sjostedt Boot Camp Questions

8:20 - 9:20

Session 2D

1. There *Must* be 50 Ways to Build Endowment – Fundamentals Track ...

Janet Topolsky

Salons A-C

What's a CRUT versus a CRAT? How do you tell the difference between a charitable lead trust and a charitable remainder trust? How does one get started with a program to encourage planned gifts? Taking a step up from Asset Development 101, Planned Giving Basics provides a more detailed overview of some of the more common types of planned gifts and identifies which types of planned gifts may best suit particular donors.

2. 2014 Legislative Session Update & Election Outlook

Lara Kalwinski & Kimberly Svaty
Salon F

The 2014 Kansas Legislative Session as relatively quiet for the Community Foundations but with the House up for election, the start of a new budget cycle and a budget shortfall, Kimberly Svaty will prep you for interesting times are ahead. Additionally, Lara Kalwinski, a member of the Council on Foundations public policy team, will share the latest information from Washington DC regarding tax reform, recent and proposed legislation and regulations that affect community foundations.

3. How to Create High Trust Donor Relationships...in a Low Trust World

Bruce Brinkman
Atrium

The economy has seen sluggish growth over the past four years, but donor concerns linger on. Spiraling health care costs and longer life spans have aggravated even the wealthier donors' fears of running out of money. This seminar will tackle the tough issues you face in meeting donors fears by developing effective trusting relationships. A portion of the presentation will be an example of how to overcome your donors' concerns by inspiring them to take action with their legacy giving plans.

4. Laying the Foundation: Board Development

Amy Delamaide
Salon 1

The strength of your community foundation board affects your ability to carry out your philanthropic mission and goals. In this interactive session, you'll learn and discuss the nine steps of the board building cycle and how to apply them to your board. You'll also get a refresher on the roles and responsibilities of boards and individual board members.

5. Affiliates and Their Host Foundations – Relationships & Expectations

Sandi Fruit, Cathy Domsch & Betsy Wearing
Salon2

Learn more about the most prominent Kansas affiliate models --
- what back office services are typically provided by the hosts?

Are affiliates staffed and what is the expected division of labor? Do affiliates need an independent 501(c)3 designation --- or not? What are the responsibilities of the local advisory boards? From the perspective of both hosts and affiliates – what are the advantages/disadvantages of this professional relationship?

9:20 - 9:35

Break

9:35 – 10:35

Session 2E

1. Board Engagement – Board Service That’s Fun and Fulfilling – Fundamentals Track

Aubrey Patterson
Salons A-C

Join Aubrey Patterson, President of Hutchinson Community Foundation, and a couple of real life board members for a candid conversation about how service on a Community Foundation board can be both fun and fulfilling.

2. Roads to Success: Tools, Technical Assistance and Leadership

Sarah Hartsig, Vern Hendricks, Tatiana Lin & Travis Rickford
Salon 1

Historically, Kansas community foundations have served as a trusted resource for delivering programs and services. This session will feature a panel of speakers that will highlight how community foundations can engage in health improvement efforts to strengthen the quality of life in their communities. Travis Rickford, Kansas Department of Health and Environment, will discuss a renewed emphasis on moving from healthcare to public health and using evidence-based tools in community health at the state and local level, and one practical tool, the CHANGE tool, which can be used to gain a picture of the community systems in place to support health, and assist with prioritizing community needs and allocating available resources. The second presenter, Sarah Hartsig, Kansas Health Institute will discuss new opportunities and resources available to community foundations to support local health improvement efforts. Specifically, Sarah will share a story of one community foundation and its journey from information to action. The last speaker, Vern Henricks, Greater Manhattan Community Foundation, will wrap up the discussion by focusing on the importance of partnerships for influencing public policies. Vern will share how their foundation built a successful leadership team and engaged to influence policies around healthy eating habits.

3. Unleash the Power of Your Foundation Data

Tami Brown
Salon F

Join MicroEdge in this session to learn how you can use information from FIMS to showcase the impact of your organization, and how you can build a strategy for continued success. We will also share how our FIMS product family has grown, and continues to evolve – including an update on where we are today with our FIMS solution, what we have learned through our extensive market research, and what you can expect down the road in next generation products and services.

4. Review of Keep 5 in Kansas Resources and Tips for a Successful Marketing Campaign

Anne Allan, Pam Moore, Angie Baur & Thomas Keller
Atrium

Materials developed by KACF for the Keep 5 in Kansas statewide campaign will be reviewed with a panel presenting ideas for use and incorporation into local community foundation websites, and other CF marketing and development practices.

5. Meet the Council’s Counsel

Suzanne S. Friday & Lara Kalwinski
Sedgwick

Schedule at the registration desk a short one-on-one with Suzanne Friday or Lara Kalwinski, attorneys at the Council on Foundations, to discuss individual legal issues affecting community foundations.

10:35 – 10:50

Break

10:50 – 12:05

Session 2F

1. Community Foundation Bootcamp Part 3 - Grantmaking & Community Leadership Readiness – Fundamentals Track

Judy Sjostedt
Salons A-C

Orient your leaders right from the start on the essentials of a solid grant-making program and an overview of how the issues that emerge provide opportunities for your organization to enhance its community leadership capacity. Includes discussion of grant-making basics; types of grants; issues you may encounter with different grant types; ways to multiply the impact of your grants in partnership with others; and how to

use your grants to promote community engagement with your organization, etc.

2. Non-Cash Charitable Gifts - Advanced

Suzanne Friday
Atrium

This advanced legal session will discuss the tax implications for donors contributing non-cash charitable gifts including IRAs and other retirement assets, life insurance, real estate and other property gifts. The session will also cover options and strategies for community foundations that receive these gifts including holding and managing property for income, liability concerns, and liquidation strategies.

3. Toward a Healthy Future

Pam Moore, Katy Kitchen, Liz Sosa and Christy Hopkins
Salon 1

Learn about 3 programs that really work to nourish philanthropy and encourage active participation among the young people in your community. You will discover the Power-Up Movement, Kids Impact Cowley County and Youth GrantMakers Council.

4. Rooting Rural Wealth: What Can We Do to Improve Rural Livelihoods? - Advanced

Janet Topolsky
Salon F

Community foundations that want to help their community do better are often confounded by what contribution they can make. This is especially true in rural communities and regions where the path forward can seem more remote, leadership-challenged and unclear. This session will offer a framework for thinking about how your foundation might sharpen its grant making and program strategy to help rural people, places and firms better connect to the region's economy. It will review the roles you might play in doing so. And it will help you address this question in relation to your impact on the ground: "Are we spending or investing in the region....?"

12:05 – 12:20

Break

12:20 – 1:35

Lunch Plenary

Salons D-E

What's Next for Community Philanthropy?

Jess Ausenheiler

What will the coming years have in store for community philanthropy? Monitor Institute, a part of Deloitte Consulting LLP, has led an 18-month-long innovation and design process to help community foundations think creatively about their futures. The What's Next for Community Philanthropy initiative aims to help community foundations build on their existing strengths, while also challenging traditional assumptions about what they do and exploring new roles that they can play in their communities.

The culmination of the initiative is a Toolkit that will feature nearly a dozen interconnected essays, exercises, and even games to help the community foundation field enter its second century afoot. Following the national launch of the Toolkit at the 2014 Council on Foundation Annual Conference in early June, Kansas Regional Association of Community Foundations will get a presentation of the initiative's findings and of several tools from the toolkit. During the session, Jess Ausinheiler will share key findings of the initiative, lead the group through an exercise that can help you and your board make strategic choices, and answer any questions you may have.

1:35

Adjourn