

Annual Conference of the Kansas Association of Community Foundations

October 29 and 30, 2012

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

Telling the Story

Day 1 – October 29, 2012

11:00 **Registration Opens**

12:00 – 1:15 **Lunch Plenary**

Salons E-F

The Power of Shared Story

Jay Allison

We are made of stories. Yet we often communicate in mere data. Using examples drawn from years of public radio storytelling, including This I Believe and The Moth, Jay will talk about how to recognize our own best stories, how to tell them out loud, and share them in ways that they will be heard.

1:15 – 1:35 **Break**

1:35 - 2:35 **Session 1A**

A. Legal Considerations for Administering Scholarships

Kelly Shipp Simone
Salons A-C

Who can establish a scholarship fund? Who can participate in the scholarship selection process? May scholarship checks be issued directly to a student? These are just a few of the many scholarship questions community foundations face. This session will review the basics and allow lots of opportunities for you to ask your burning scholarship questions.

B. Finding Stories in Our Work

Jay Allison
Atrium

This interactive session will be an extension of Jay's keynote. In it he'll give you the opportunity to tell him what you're working on and he will give suggestions for developing the narrative. This session will be tailored by you, so bring your thoughts and questions!

C. The Healthy Communities Movement

Jeff Usher
Salon D

In this session participants will learn about the Kansas Healthy Communities movement and how they can partner with the Kansas Health Foundation to be a part of this exciting opportunity in strategic grantmaking. This will be an interactive session where participants can discuss and brainstorm how their local community efforts can be a part of this movement.

D. Through an Auditor's Lens

Wendy Horton
Salon 1

Auditors are taking a harder look at internal controls. You should as well.

- Preparing for the audit. Internal controls. Fraud.
- Responsible back office. Staffing for finance. Appropriate staffing and complexity.

Executive compensation and salary surveys are the highlight of every year. We'll take a look at executive compensation from an auditor's perspective as well as culling a few jewels from annual surveys.

2:35 - 3:05

Ice Cream Social

Session 1B

A. The Lawyer Is In Consultations

Kelly Shipp Simone
Sedgwick Room

Sign up on-site at the registration desk for a 10-minute, one-on-one discussion with the Council on Foundation's Deputy General Counsel Kelly Shipp Simone. Whether it is setting up a particular scholarship fund, making a tricky grant or something entirely different, she can provide legal information to you on an issue facing your community foundation that may be keeping you up at night.

B. Discover Our Transfer of Wealth Story

Leon Atwell
Atrium

Through an interactive workshop we will explore what Transfer of Wealth (TOW) means and discover what we can do with it. We will learn the progress KACF has made with TOW research and consider how we can use it to create a better future for our communities.

C. Sharing Back-Office Services Using Community Pearl

Henry Bromelkamp & Pamela Moore
Salon 1

Come learn about sharing back-office services using Community Pearl software with technology and skilled accounting and administrative staff you don't have to support alone. Community Pearl is distinguished from other software systems because of its powerful fund accounting, ease of use, flexibility, and low ongoing cost. Yet it can be accessible to you in your office or at home, even while your shared back-office staff in another town is keeping your accounting covered. Hear (via online web meeting) from people who have used this model (both as providers and as users) in other places, and our own new offering at Legacy Regional Community Foundation in Winfield. It's not just about saving money; it's also about being better stewards for our communities, which makes us more successful.

C. When Needs Become Stories

Terry Woodbury
Salon D

I quit asking “tell me about your 3 biggest problems” about 20 years ago. An hour-and-a-half of negativity, blaming and whining disabled the group. I came to believe that the character, dreams and challenges in any community are revealed in the stories they tell, especially when the focus is upon “hope.” How do we engage deep conversation that goes beyond the mundane, objective facts and digs into the soul of a community? How do we nudge people into civic leadership by our questions? Yes, this is all “needs assessment.”

D. From Exclusive to Inclusive – Shifting the Conversation to Build Rural Endowment

Judy Sjostedt
Salons A-C

Many of our rural towns become accustomed over the years to seeing their communities portrayed as places of need, making it difficult sometimes to see all the opportunities for assets right in front of us. As we worry so much about finding that one ‘big’ giver, we often overlook many charitable persons of more moderate means. And sometimes, even our own attitudes pose barriers to our progress; local can never be local enough! This session focuses on raising endowment - permanent resources - for our rural communities. Endowment is vital for rural America - it’s essential to make progress in building permanent funds. Bring your ideas and questions to the conversation.

4:05 - 4:20

Break

4:20 - 5:20

Session 1C

A. Addressing Financial Leadership

Wendy Horton
Salon 1

Financial management and financial leadership are often confused. While the *management* of financial resources requires data, reporting, and an understanding of internal controls, the financial *leadership* component is focused on creating long-run sustainability and impact.

It is up to the executive director to develop a business model that works by balancing current needs, mission impact, and long-term vision. We'll talk about annual budgets, cash flows, creating a reserve, income diversification, and effective grant proposals.

B. Navigating Affiliate Relationships –Set Your Pace by Managing Expectations

Judy Sjostedt
Salons A-C

Setting a strong framework up front helps avoid disappointment and friction later, helping both those who are affiliates as well as those who are hosts understand what is reasonable to expect from their partnership. Discussion of issues that can arise and possible strategies to mitigate these issues is offered as well as practical tools to help guide expectations and manage finite resource allocation.

C. Improving Impact: Sharing and Learning From Our Grants

Laurie Craft
Atrium

Community foundations generally fund across many program areas of interest with little commonality between grants. This interactive session will explore the challenge of working with grantees to think about outcomes as opposed to outputs, grant reporting relative to evaluation, using what is learned from grants, and sharing results with board and donors. Bring your ideas and stories to share, while learning about best practices from the field.

D. Political Overhaul - An Election and 2013 Forecast

Kelly Shipp Simone & Kimberly Svaty
Salon D

The Kansas political landscape is churning in ways not seen since the Civil War. Kansas is making national headlines this election cycle. With the Republican Party battling against each other and the Democrats attempting to rebuild, what will Kansas politics look like post Election Day and what will that mean for the 2013 Legislative Session? This session will also focus on Donor-Advised Fund studies, IRA charitable rollover extension,

changes to the charitable deduction – come learn about what is happening at the federal level that may affect your foundation.

6:00 **Dinner, Annual Meeting and Social**
Salons E-F

Day 2 – October 30, 2012

7:15 – 8:00 **Breakfast**
Salons E-F

Roundtables

- Community Foundation Boards
- Program Officers
- Community Foundation Directors
- Finance/Administration/Technology

8:20 - 9:20 **Session 2D**

A. Basic Planned Giving: Stories Behind the Gifts
Sandi Fruit and Angie Baur
Atrium

Learn the basics of each planned giving tool (bequest, charitable trusts, annuities, lead trusts and bargain sales), but more importantly hear the donor stories behind the gifts and learn how they were successfully applied in real life situations. Do you have donors/prospects in similar situations and will these tools work for you?

B. National Standards for U.S. Community Foundations™: What Does the Future Hold?
Daria Teutonico
Salon 1

National Standards for U.S. Community Foundations™ were formally adopted in 2000 with the aim to unify and define community foundations and promote their integrity and public trust. Fast forward 12 years. What have we learned that can help all community foundations, especially smaller ones, become compliant with National Standards? How do National Standards need to change and evolve to address the challenges

community foundations face today? What changes are on the horizon? Come join the conversation about the future of National Standards.

C. The Power of Story in Leadership

Ed O'Malley
Salon D

Community foundations are powerful forces in Kansas. But, telling that story, and using stories in general when exercising leadership, can be challenging. This session will explore the connection between storytelling and exercising leadership on behalf of creating stronger and more influential community foundations.

D. Social Media - a Community Love Story in Likes, Links and Retweets

Tanner Lucas
Salons A-C

All too often, community foundation staffs and volunteers struggle to connect with people who can assist in the community giving process. This session will provide both professional and volunteer staffs with some information and tips for how to most effectively reach these different publics by using social media.

9:20 - 9:35

Break

9:35 – 10:50

Session 2E

A. Governance Issues for Community Foundations (Basic)

Sandra Hughes
Salons A-C

This will be an interactive session concerning basic governance principles and practices such as board composition, the ED-board relationship, committee structure, basic board legal and fiduciary responsibilities, and other topics that are unique to community foundation governance. Handouts will be provided

B. Optimizing FIMS to Tell Your Foundation's Story

Tami Brown and Nick Mills

Salon 1

This session will walk through tips and best practices for using FIMS to effectively track and report on all of your efforts, ultimately helping you weave your foundation's complete story. Through the use of Data Grids, the Graphical Viewer and additional FIMS reporting tools, you will learn how to pull from the wealth of information stored within your system today which in turn will help you build the vision for tomorrow. In addition, learn how utilizing FIMS along with integrated tools like FIMS CRM, DonorCentral and FIMS Online Fundraising solution powered by Kimbia, allows you to put together all the pieces of your foundation's story in one complete solution.

C. Who Advises the Trusted Advisor? – Stories and Strategies of the Professional Advisor Partnership

Joe Lumarda

Salon D

Advisors are community foundation's bread and butter for marketing, referrals and asset growth. In this session we will explore the nature of the various categories of professional advisors and why they do or don't work with our foundations. Come prepared to share your favorite success and/or horror story regarding these important relationships.

D. Hands-on Storyboarding

Donna Vestal & Theresa Hearn

Atrium

Jay Allison has provided KACF with a storyboarding toolkit – a useful technique for developing stories. During this session you'll work in groups to lay out the structure and components of a story, taking into account how it would be adapted for different audiences. Gain storytelling confidence in this practical hands on session!

E. Doctor is In – National Standards Consultations

Daria Teutonico

Sedgwick Room

Sign up on-site at the conference registration desk for a 10-minute, one-on-one discussion with the Council on Foundation's Daria Teutonico, the lead staff person for the Community

Foundations National Standards Board, a supporting organization of the Council that oversees the National Standards accreditation process. This is your opportunity to get your tricky questions about the National Standards accreditation process answered!

10:50 – 11:05 **Break**

11:05 – 12:05 **Session 2F**

A. New Opportunities: Sunrises or Busses?

Joe Robb and Laurie Craft
Salon D

How do you view opportunities? Are they like sunrises, where if you wait too long and you miss them or like busses where here's always another one coming? Well opportunities have rolled in just like another bus but like the sunrise don't wait too long. Joe Robb, Attorney with Somers, Robb and Robb will talk about some dollar shift opportunities such as increased oil activity, commodities prices, high \$/acre land sales, wind farm and pipeline monies, as well as tax changes and their effect on planning.

Laurie Craft, Program Director at the Grand Rapids Community Foundation will discuss her experiences in working with donors on impact investing, alternate ways to think about investing assets, and new ways to think about using media for community outreach.

B. Kansas Perspectives: Getting to the Heart of Our Stories

Donna Vestal & Theresa Hearn
Atrium

This session will present an overview of storytelling from a Midwestern journalist's perspective. Donna Vestal, editor of Kansas City-based Harvest Public Media, will provide practical tips and examples on everything from conducting an interview to identifying details that matter. She also will focus on the challenges of producing news releases and photographs that get the attention of editors. By understanding how media outlets report on stories, you will come away with great insight on how to bring your own stories to life. Theresa A. Hearn, Executive Director of the Derby Community Foundation, will then discuss the next step – incorporating that storytelling insight into the

day-to-day operations of your community foundation. Hearn, who describes herself as a "born" storyteller, also will discuss the importance of engaging and encouraging board members to storytell.

C. Things Your Mother Never Told You about Governance

Sandy Hughes
Salons A-C

This interactive session is for those wanting to create a higher performing board performance and culture in the community foundation. Topics covered will include how the board adds value to the work of the Foundation; 'best practices' for your board; how to avoid boring board meetings; building a great board; and creating a culture of care and inquiry. Handouts will be provided.

D. Engaging the Public in Health Policy Issues: How to Make Better Choices by Expanding the Circle

Jennifer Wilding
Salon 1

When creating public health policies, the public is often an untapped resource. Getting the public involved in wrestling with difficult policy choices helps build political will and can assure the policies work in the real world. In this session, you'll hear examples of your peer's involvement in health initiatives. You'll also learn the basics of how to define the problem, recruit diverse participants, and design processes that get you the information you need.

E. Community Foundation Bootcamp

Troy Unruh
Salon 2

New community foundation board members or staff, take this opportunity to put your boots on the ground as we cover the basic nuts and bolts of a community foundation. Get practical how to's and what's next, along with the understanding that we all have an important part in impacting our friends, family and

communities.

12:05 – 12:15

Break

12:20 – 1:35

Lunch Plenary

Salons E-F

The Changing Face of Philanthropy: Donors' Wants, Needs and Expectations in a Time of Great Change

Joe Lumarda

In times of great change, community foundations and their leaders - both staff and board members - must balance the on-going commitment to mission, solid governance, good grantmaking and financial equilibrium as well as have a thumb on the pulse of the dynamic wants, needs and expectations of their donors and stakeholders. During this lunch plenary, we will examine the demography and psychology of donors in light of the unsettling economic environment. How has this time potentially changed the way donors view their assets, their future and their philanthropic dreams? What may have changed and what will stay the same? How will we need to change in order to meet donors' needs? This session will discuss personal and global trends that affect our world and our important work.

1:35

Adjourn