

Annual Conference of the Kansas Association of Community Foundations

October 7 and 8, 2013

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

Healthy Foundations, Healthy Communities

Day 1 – October 7, 2013

11:00 **Registration Opens**

12:00 – 1:15 **Lunch Plenary**

**The Secret to Raising Unrestricted Assets: How to Meet
Community Needs from Health to Economic Development
through Unrestricted Endowment**

Ralph Serpe, CFRE

Community Foundations hold the power to transform communities. But relatively few have unlocked the secret to raising significant assets to support that transformation. Using examples from 82 community foundations from across the country, Ralph will talk about how your community foundation can build the unrestricted assets necessary to strengthen your community, and yourself, along the way.

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

1. **Grantmaking Basics – How to Begin and Best Practices
(Basics Track)**

Judy Sjostedt

Just getting started as a grantmaker? Come learn more about the core elements of good grantmaking – This one-hour session provides an overview of considerations from initial design of grants programs, to assessing grant proposals, to understanding of the legal nuances of certain unique grant types (special awareness around grants to individuals, grants requiring expenditure responsibility, and economic development grants,

for example). This session is intended as a fundamental briefing on basic structure and good practice for grants programs.

2. **Successful Strategies for Field of Interest Fund Raising – such as Public Health**

Ralph Serpe, CFRE

In this session Ralph will discuss how Community Foundations across the country are raising field of interest funds as part of an overall asset development strategy. We will discuss internal structures to support fund raising, new prospect identification, donor engagement and how to "reframe" your case for support.

3. **Funder to Investor: A Different Mindset for Different Grantmaking Results (Advanced)**

Debra Natenshon

The funding environment represents a continuum from funders (in the business of grant allocation for programs) to smart investors (in the business of buying results for human gain). Debra Natenshon from The Center for What Works will describe the funding environment and help community foundations navigate their way toward building relationships with grantees to garner higher results.

4. **Connecting the Funding Dots in Economic Development**

Patty Clark & Pete Meitzner

Join us for a lively discussion on economic development that will provide success stories, new ideas for public/private partnerships, and a glimpse into the changing views about the public vs. private funding dilemma.

5. **Kimbia Giving Local America Consultations**

Sign up in advance to talk with Lori Finch from Kimbia about your Giving Days program. She may ask you for some information prior to the conversation for a more specific conversation. To sign up email lori@kimbia.com

2:35 - 3:05

Healthy Snack Social

3:05 – 4:05

Session 1B

1. **Impact Investing (Advanced)**

David Wood & Aubrey Abbott Patterson

Community Foundations are increasingly interested in mission investing, both as a way to increase the resources they devote to community impact, and as a way to engage new donors in foundations strategies. This session will outline the ways community foundations can engage in mission investing, and offer examples of how they have done so.

2. **Building Rural Endowment through Relationships (Basics Track)**

Vern Henricks, Sandi Fruit

This session will discuss new opportunities for rural endowment building and strategies for building relationships with the arts, schools, and higher education community partners.

3. **Encouraging Active Living through Healthy Community Design**

Jeff Usher, Bailey Stiggins & Marilyn Hull

Learn how your community can make it easier and more rewarding for residents to incorporate walking, biking and other forms of active transportation into their everyday lives. Representatives from the Hutchinson/Reno County Chamber of Commerce and LiveWell Lawrence will share their goals, successes and challenges in advocating for road networks that accommodate pedestrians, bicyclists and other wheeled-device users of all ages and abilities. Jeff Usher from Kansas Health Foundation (KHF) also will discuss KHF's interest in Healthy Community Design and current and future partnerships in promoting these efforts.

4. **Keep 5 in Kansas! The TOW campaign is here!**

Lisa Sisley & Betsy Wearing

You have heard about the Transfer of Wealth. You have seen the numbers. Now come learn about the campaign. Let KACF and the creative team from New Boston help you spread the word in your own community about how to **Keep 5 in Kansas!** (Campaign materials will be available to take with you!)

5. **Measuring Results Consultations with Debra Natenshon**

Sign up in advance for a one-on-one discussion with Debra Natenshon from The Center for What Works. She may ask you for some information prior to the conversation for a more specific conversation. To sign up email Debra@Whatworks.org

4:05 - 4:20

Break

4:20 - 5:20

Session 1C

1. **Asset Development 101 for New Board Members and Executive Directors (Basics Track)**

Judy Sjostedt

What makes asset development different from fundraising-do you know? How can community foundations best position their organizations to obtain larger gifts? This session offers basic information about how to approach asset development; how to find donors who may need the community foundation's services and how to identify which types of gifts suit certain donors better than others.

2. **Kansas Health Matters: A New Tool for Identifying Strategic Priorities and Creating Healthy Communities (Advanced)**

Robert St. Peter & Tatiana Lin

Community foundations have access to data and tools today that can assist them in making more strategic and evidence-based decisions about which community priorities require attention and investment. This interactive session will demonstrate a new resource – Kansas Health Matters (KHM). This online tool (www.kansashelathmatters.com) can help community foundations identify and prioritize health concerns in their communities and appropriately align funding decisions. In order to maximize the learning experience, the site features will be demonstrated via addressing a real-life community health issue using KHM tools (e.g., community data, promising practices, links to online resources, etc.). Discussed in the context of this tool the audience will also learn about factors (e.g., education, built environment) that affect health. The discussion will help community foundations assess their current strategic directions and identify new ones. The interactive session will offer multiple opportunities to ask questions and provide input.

3. **Four Things to Teach Your Accountant**

Henry A. Bromelkamp

It can be challenging to find an accountant who works in nonprofit accounting. But looking for an accountant who understands fund accounting for a community foundation is like finding a needle in a Kansas haystack, because a community

foundation has four unique but critical financial functions that require special understanding and expertise:

- Joint Investment Allocation
- Fund Administrative Fees
- Spendable Allotment
- Rebalancing Funds

Whether or not your accountant has a lot of community foundation experience, it's still your responsibility to understand what you need. Come join us for a non-technical look at the concepts and options behind these four essential functions. Brush up on your current allocation and spending policies and fee structures beforehand -- send them to Henry if you're like to benefit as a case study. We'll discuss how your policies can be fairer for your donors or more reliable or easier for you, whether you use FIMS, Community Pearl, Excel spreadsheets, or other accounting software. No snoozing.

4. **KS Giving Days And Give Local America 2014 -Success Stories And GLA Capacity Building**

Lori Finch, Aubrey Abbott Patterson, Vern Henricks, & Bill Stewart

Keep hearing about Match Days and Give Local America, but not quite sure what it's all about? Come listen as Lori Finch from Kimbia and your peers discuss their match day experiences and best practices.

5. **Impact Investing Consultation with David Wood**

David Wood

Sign up in advance for a one-on-one discussion about impact investing with David Wood from the Hauser Institute for Civil Society at Harvard University. He may ask you for some information prior to the conversation for a more specific conversation. To sign up email David_Wood@hks.harvard.edu

6:00

Dinner, Annual Meeting and Social

Salons D-E

Day 2 – October 8, 2013

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

8:20 - 9:20

Session 2D

1. Planned Giving Basics (Basics Track)

Judy Sjostedt

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. Improving Access to Healthy Foods: Policy Approaches and KHF Funding Opportunities

Jeff Usher, Marilyn Hull & Eileen Horn

In many parts of Kansas—both rural and urban—lack of access to affordable, healthy food contributes to high rates of chronic disease. In this session, you will learn why and how some community foundations are supporting policy and systems changes that aim to improve local food systems. You will learn about food policy councils—their mission, roles and composition—and discuss examples of actions they can take to increase healthy food access. Kansas Health Foundation program officer Jeff Usher will explain KHF's funding initiative to support the work of food policy councils and the partnership opportunities available to community foundations.

3. Best Practices in FIMS

Tami Brown

Join MicroEdge in this session to learn how you can maximize the use of your FIMS core system! We will cover topics such as the ability to track communications with your constituents (both through the core functionality of the FIMS system and through the use of CRM/DonorCentral) simplifying your processes with IGAM and Kimbia; and more!

4. **Making the Most of Gifts of Real Estate and Other Personal Property Interests (Advanced)**

Suzanne Friday

Foundations interested in accepting gifts of real estate and other personal property interests will learn how and why these can be win-win situations for both the donor and the Foundation. The session will address legal and tax issues presented by such gifts including valuation, timing of gifts, encumbered property and substantiation, and discuss best practices for gift acceptance and documentation.

5. **Governance Consultations I**

Sandra Hughes & Chris Larson

Do you have a sticky board issue? Sign up in advance for a one-on-one discussion with KACF faculty governance consultants Sandra Hughes (established foundations) or Chris Larson (younger rural foundations). They may ask you for some information prior to the conversation for a more specific conversation. Meeting options also available session 2F. To sign up email Sandra Hughes sandra_r_hughes@yahoo.com or Chris Larson chris@aandcnw.com

9:20 - 9:35

Break

9:35 – 10:50

Session 2E

1. **Building Collaborative Partnerships with CPAs**

Laura Mossman & Carrie Emberson

Building Collaborative Partnerships with professional service firms should be an integral part of a community foundations strategic plan. Join Laura Mossman and Carrie Emberson from BKD CPAs & Advisors and learn about charitable giving strategies that will provide a direct benefit to donors and why an alliance with a CPA can be a win-win-win for the community foundation, donor and professional service firm. We will also provide you with tactics to develop enduring relationships with professional service firms that will increase your donor loyalty.

2. **Healthy Boards, Healthy Foundations (Advanced)**

Sandra Hughes

Join your colleagues for an interactive session for established Boards of Directors and CEOs who have prior governance knowledge and experience. Topics discussed will include how to

identify and handle a toxic board culture; how to identify board systems and structures that make high performing governance a challenge, and how to revitalize a 'sickly' Board.

3. **Building A Healthy Foundation For Your Community Foundation Board (Basics Track)**

Chris Larson

Discover the next steps toward better governance, including increasing board member engagement. Gain an in-depth understanding of the latest Governance practices and learn how to advance boardroom culture in this interactive and informative session

4. **Take Note. Managing and Preserving Prospect and Donor Conversations, Preferences and Fund Histories**

Nancy Jones, Vern Henricks, Tami Brown & Henry A. Bromelkamp

Wait, I can't remember -- did the prospect's children attend the University of Kansas or was it Kansas State? Does she love Meals on Wheels or was that the agency that forgot to thank her for her generous gift? Since Community Foundation gifts take many months and sometimes years to come to fruition, is it any wonder we forget some of the details? Listen in as Community Foundation veterans and IM consultants share tips and ideas on tracking conversations, as well as incorporating important conversations into the history and future activities of the Fund.

5. **Legal Consultations with Suzanne Friday**

Suzanne Friday

Sign up in advance for a 10-minute, one-on-one discussion with the Council on Foundation's Suzanne Friday. Suzanne has extensive experience representing nonprofit organizations including community foundations, charitable trusts, private foundations and corporate foundations. She may ask you for some information prior to the conversation for a more specific conversation. To sign up email Suzanne Friday (fris@cof.org)

10:50 – 11:05

Break

11:05 – 12:05

Session 2F

1. **2013 Legislative Session Update and 2014 Forecast**

Kimberly Svaty & Suzanne Friday

The national and Kansas political scene is changing rapidly with potential great impact on the ability of community foundations and other philanthropic organizations to pursue their mission. Learn more about what happened in 2013 and what could develop in 2014.

2. **Please Remember my Mother: Scholarships and Alternatives**

Nancy Jones & Angie Baur

Techniques to design a gift so that the community, the Community Foundation AND the donor are delighted – now and in the future. This session describes some of the ways that fund policies, early conversations, and questions to the prospect can determine the ultimate charitable fund.

3. **How To Do Marketing and Social Media When Everyone Is Busy and Resources Are Limited (Basics Track)**

Jade Piros De Carvalho & Theresa A. Hearn

Does marketing your foundation overwhelm you? If so this session will have some great ideas. Theresa A. Hearn, Derby CF executive director, will tell you about her experiences with the Derby Community Marketing Partnership, an innovative example of how to share marketing resources. In addition, Jade Piros De Carvalho of LogicMaze will discuss how effective websites and carefully planned social media outreach can help you reach your goals.

4. **Leading Health: Engaging Businesses to Support Healthy Worksites**

Aubrey Wiechman, Elizabeth Ablah, Marilyn Hull, Susan Johnson & Jeff Usher

Learn about opportunities to partner with the Kansas Health Foundation (KHF) and WorkWell Kansas to improve the culture of health at worksites in your community. KHF's program officer Jeff Usher and the WorkWell Kansas team will outline the initiative's goals and offerings. Using Douglas County as an example, we will discuss how a community foundation and its local partners can leverage these resources to create a more productive workforce.

5. **Governance Consultations II**

Sandra Hughes & Chris Larson

Do you have a sticky board issue? Sign up in advance for a one-on-one discussion with KACF faculty governance consultants Sandra Hughes (established foundations) or Chris Larson (younger rural foundations). They may ask you for some information prior to the conversation for a more specific conversation. Meeting options also available session 2D. To sign up email Sandra Hughes sandra_r_hughes@yahoo.com or Chris Larson chris@aandcnw.com

12:05 – 12:15

Break

12:20 – 1:35

Lunch Plenary

Salons D-E

The Weight of the Nation – How to Lead Your Communities

Deborah Alvarez-Rodriguez & Robert “Bob” Garcia

The Weight of the Nation is a far-reaching public health campaign about obesity, excess weight, and the impact on our country. It centers on a series of Emmy-nominated documentary films, for adults and children, to raise awareness nationwide and engage the public about the epidemic of obesity and excess weight. Through the films, you can learn how businesses, community nonprofit organizations, schools, families and children are combatting obesity. During this session, you will have the opportunity to hear from two of the partners in this initiative, who will share best practices on how your leadership can promote the use of the Weight of the Nation resources.

1:35

Adjourn