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## 2022 Conference Learning Sessions

### 1.0 Governance

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#### 1.1. Understanding your role and responsibilities on the board

*Understanding your unique role and responsibility as a board member will help you better oversee and lead your community foundation now and into the future.*

Learn about critical positions and required skills of an effective community foundation board. Assess the roles required to best support your community foundation's work.

#### 1.2 Planning for your community foundation's future

*Understanding the critical elements of an effective community foundation strategic plan will help set your board on the best possible path to its future.*

Learn why strategic planning matters and what goes into an effective plan. Identify what information is needed to build a plan and explore how much time your board should devote to strategy.

#### 1.3 Board member orientation best practices

*Effectively onboarding new board members helps them not only understand how your community foundation operates, but how best they can immediately contribute to its success.*

Learn how to effectively onboard new board members (while reinforcing best practices with current members) and dramatically decrease the time it takes them to begin contributing meaningfully to your work.

#### 1.4 Planning for your future board

*Planning for your board's succession helps ensure your community foundation's sustainability and growth. Without a board succession plan, your board's future is uncertain, and the recruitment of new board members can be challenging.*

Learn how to effectively use succession planning tools and practices such as a skill matrix, a diversity, equity, and inclusion lens, board committees, and a nomination process to build your board's current and future capacity.





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## **2.0 Finance & Administration**

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### **2.1 By the numbers: fundamental financial and bookkeeping practices**

*Following specific financial accounting and reporting practices ensures your community foundation maintains its charitable status and remains accountable to its community.*

Learn the elements and terminology required to understand and to keep accountable your community foundation's financial statements, bookkeeping, and reporting practices.

### **2.2 How an endowment works: sustainable fund strategy**

*Following a Sustainable Fund Strategy ensures that your endowments support your community foundation's efforts and your community's wellbeing, forever. But how does it work?*

Learn how to explain why sustainable funds matter, and how they enable your community foundation to operate and support your community across future generations.

### **2.3 To hire or not to hire?**

*At a certain point, the question of hiring staff becomes a consideration for a growing community foundation. When is the right time? Who should we hire? What will they do?*

Learn the benefits and challenges of hiring community foundation staff. Review the basic elements (i.e., job description, skill sets, salary ranges) and learn how to navigate the relationship between the volunteer board and paid staff.

### **2.4 Developing and managing your community foundation budget**

*Effectively managing your community foundation's administrative budget demonstrates your commitment to transparency, accountability, and financial stewardship.*

Learn the fundamental structure and elements of a community foundation budget and explore "best practices" in ensuring that your budget targets are met.



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## 3.0 Fund Development

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### 3.1 Getting to know your donors: engagement principles and practices

*Positive and engaging relationships with your donors is key to your community foundation's growth. Without them, fund development efforts, and gifts in support of your funds, can be limited.*

Learn how to build and maintain effective relationships with your donors and explore why continued engagement matters even after receiving a gift.

### 3.2 Connecting with the donors of tomorrow

*Understanding the demographic changes in your community's donors and how to effectively engage them will ensure your community foundation's continued success in fund development, now and forever.*

Learn how to tailor your engagement activities to your community's diverse donor population. Appreciate giving trends, including the giving motivators of a diversity of donor types.

### 3.3 Not all funds are equal: Understanding fund types

*Offering a wide selection of fund types can benefit your community foundation's fund development efforts by engaging a wide range of donors and gifts. But which fund types should you be championing and why?*

Learn to describe, compare, and contrast the benefits and drawbacks of each fund type available to community foundation donors. Appreciate the role and impact each fund type has on your fund development efforts and strategies.

### 3.4 Planned giving: what it is and how it works

*Effective planned giving practices can both honour family wishes and support their legacies through your community foundation's efforts.*

Learn best practices related to planned gift administration, and how to best engage your community in planned giving discussions.



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## 4.0 Grant Making

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### 4.1 Effective community granting

*Granting is your community foundation's most recognizable and public activity, and "doing it right" is critical to both your reputation and your effectiveness.*

Learn basic elements of community grant making through review of core components (application, awarding, reporting) along with best practices to ensure their effectiveness.

### 4.2 Asking the right questions: building an effective grant application process

*Designing a grant application process that reflects your community foundation's values is critical to support your engagement, connection, and impact in your community.*

Learn the differences, benefits, and challenges across various grant application processes and how they can be implemented. Explore how your community foundation can increase community involvement through inclusive grant application activities.

### 4.3 Connecting grants to community priorities: impactful grant awarding practices

*Making grant awarding decisions based on both what you know AND what you believe ensures that the projects supported by your community foundation are the "right ones."*

Learn impactful (authentic and informed) grant awarding by exploring various approaches to grant application evaluations, decision-making, and "weighting" criteria.

### 4.4 Being accountable to the community: measuring grant impact

*Understanding the impact of your granting helps your community foundation to remain accountable and to demonstrate its value to more than just the recipients.*

*Learn various methods to understand, use, and communicate the impact of your grants, from simple reporting approaches to more complex and community-derived performance measurement practices.*



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## 5.0 Strategic Initiatives

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### 5.1 "Best Kept Secret?": building community awareness

*Raising the awareness of your community foundation throughout your community helps your foundation to grow in expected and unexpected ways.*

Learn how awareness is the first step in greater community understanding, appreciation, and engagement. Explore exemplary marketing and communications practices; proven to raise your foundation's profile to maximum effect.

### 5.2 Awareness is not the end: crafting an effective communications strategy

*Beyond awareness, a communications strategy intentionally supports understanding and appreciation of your foundation throughout your community and, in some cases, can be targeted toward a more specific outcome.*

Learn how to build strong, healthy, and long-lasting relationships with your community through the development and execution of effective communications strategies.

### 5.3 How do you know what your community needs?

*Understanding your community's priorities through research and dialogue enables you to make the most effective decisions related to your community's wellbeing.*

Learn best practices to assess and generate community knowledge, to intentionally engage your community in dialogue, to build a greater understanding of your community, and to use what you have learned to inform your foundation's operations and strategic direction.

### 5.4 Stronger Together: using partnerships and collaborations to enhance your work

*Partnerships and collaborations are the cornerstones of effective community philanthropy. Working together with community-serving organizations, your foundation's strength and its impact on community wellbeing can be exponentially greater.*

*Learn strategies for effective partnerships and collaborations, common missteps to avoid, and how to best leverage these relationships to the benefit of your community.*