

Community Foundation Fundamentals Course
 September 17–18, 2011
 San Francisco Marriott Marquis ~ Pacific Suite H, 4th Floor
 San Francisco

Agenda

September 17

8–8:30 a.m.	Continental Breakfast
8:30–9:45 a.m.	Welcome, Overview, and Introductions <input type="checkbox"/> Overview <input type="checkbox"/> National Standards for U.S. Community Foundations <input type="checkbox"/> Activity: Class introductions
9:45–10 a.m.	Break
10 a.m.–noon	Chapter 1: Community Foundation Movement <input type="checkbox"/> History <input type="checkbox"/> Traditional and emerging roles <input type="checkbox"/> Unique characteristics <input type="checkbox"/> Activity: What is a community foundation? What is its mission statement? <input type="checkbox"/> Future trends <input type="checkbox"/> National standards <input type="checkbox"/> Activity: Community foundation scenarios
Noon–12:30 p.m.	Lunch
12:30–1p.m.	Chapter 2: Governance and Board Composition <input type="checkbox"/> Activity: Fickle finger of fate—what do boards do?
1–2p.m.	Chapter 2: Governance and Board Composition (Cont.) <input type="checkbox"/> Board role and responsibilities <input type="checkbox"/> Effective meetings
2–2:15p.m.	Break
2:15–3:15 p.m.	Chapter 3: Resource Development—Donors <input type="checkbox"/> Why donors give to community foundations <input type="checkbox"/> Activity: Defining the motivation of donors
3:15–4:45 p.m.	Chapter 3: Resource Development—Gifts <input type="checkbox"/> Types of gifts <input type="checkbox"/> Activity: What’s wrong with this gift? <input type="checkbox"/> Gift acceptance and agreements <input type="checkbox"/> Planned giving <input type="checkbox"/> Activity: Name that gift!
4:45–5 p.m.	Wrap Up



September 18

7:30–8 a.m.	Continental Breakfast
8–9:45 a.m.	Chapter 4: Resource Development—Donor Relations and Attracting Gifts <ul style="list-style-type: none"><input type="checkbox"/> How foundations attract gifts<input type="checkbox"/> Strategic development plan<input type="checkbox"/> Services to donors and advisers<input type="checkbox"/> Activity: Cutting-edge donor services<input type="checkbox"/> Marketing and communications<input type="checkbox"/> Activity: Tugs and pulls/balancing competing interests
9:45–10 a.m.	Break
10–11:30 a.m.	Chapter 5: Legal and Legislative Issues <ul style="list-style-type: none"><input type="checkbox"/> Understanding the nonprofit universe<input type="checkbox"/> Legal restrictions vs. donor control: Donors<input type="checkbox"/> Legal restrictions vs. donor control: Agencies<input type="checkbox"/> State law: UMIFA and UPMIFA<input type="checkbox"/> Grantmaking pitfalls<input type="checkbox"/> Legislative update
11:30 a.m.–noon	Lunch
Noon–1 p.m.	Chapter 6: Stewardship, Accountability, and Fiduciary Responsibilities (Part I) <ul style="list-style-type: none"><input type="checkbox"/> Stewardship<input type="checkbox"/> Fiscal accountability<input type="checkbox"/> Activity: What could possibly go wrong?<input type="checkbox"/> Fiscal policies<input type="checkbox"/> Finance/investment committee<input type="checkbox"/> Communicating investment and financial decisions
1–2:15 p.m.	Chapter 6: Stewardship, Accountability, and Fiduciary Responsibilities (Part II) <ul style="list-style-type: none"><input type="checkbox"/> Asset allocation<input type="checkbox"/> Spending rate<input type="checkbox"/> Operating budget<input type="checkbox"/> Staffing: What’s the right mix?<input type="checkbox"/> Conflict of interest<input type="checkbox"/> Activity: Conflict of interest
2:15–2:30 p.m.	Break
2:30–3:45 p.m.	Chapter 7: Grantmaking and Community Leadership (Part I) <ul style="list-style-type: none"><input type="checkbox"/> Setting grantmaking priorities<input type="checkbox"/> Grantmaking styles<input type="checkbox"/> Types of grants<input type="checkbox"/> Internal process/plan<input type="checkbox"/> External clarity—communicating grantmaking priorities<input type="checkbox"/> Activity: Review grant request



September 18 (*cont.*)

3:45–5 p.m.	Chapter 7: Grantmaking and Community Leadership (Part II) <ul style="list-style-type: none"><input type="checkbox"/> What community foundations bring to the leadership table<input type="checkbox"/> Considering all assets when leading<input type="checkbox"/> Leadership roles<input type="checkbox"/> Strategic assessment and planning<input type="checkbox"/> Leadership, diversity, and inclusiveness<input type="checkbox"/> Activity: Community leadership
5–5:15 p.m.	Wrap Up and Adjourn