

Resource Development for Community Foundations

September 17–18, 2011

San Francisco Marriott Marquis ~ Sierra Suite I, 5th Floor
San Francisco, CA

Agenda

September 17

7:30–8 a.m.	Continental Breakfast
8–8:45 a.m.	Welcome, Overview, and Introductions <ul style="list-style-type: none"> <input type="checkbox"/> Overview <input type="checkbox"/> National Standards for U.S. Community Foundations <input type="checkbox"/> Activity: Class introductions
8:45–10 a.m.	Chapter 1: Endowment Building (Part I) <ul style="list-style-type: none"> <input type="checkbox"/> Community foundation endowment funds <input type="checkbox"/> Types of funds <input type="checkbox"/> Unique aspects: Gift planning and endowment building <input type="checkbox"/> Asset development vs. fundraising <input type="checkbox"/> Activity: Point/counterpoint
10–10:15 a.m.	Partner Walk Break
10:15–11:15 a.m.	Chapter 1: Endowment Building (Part II) <ul style="list-style-type: none"> <input type="checkbox"/> Planned giving <input type="checkbox"/> Planned giving vehicles <input type="checkbox"/> Activity: Planned giving
11:15 a.m.–noon	Chapter 2: The Development Framework (Part I) <ul style="list-style-type: none"> <input type="checkbox"/> Resource development policy—standards specific to development <input type="checkbox"/> Activity: The interesting gift <input type="checkbox"/> Major policy components <ul style="list-style-type: none"> <input type="checkbox"/> Gift acceptance <input type="checkbox"/> Fund agreements <input type="checkbox"/> Variance power
Noon–1 p.m.	Lunch
1–1:40 p.m.	Chapter 2: Resource Development Policies (Part II) <ul style="list-style-type: none"> <input type="checkbox"/> Investment and management policies <input type="checkbox"/> Transparency <input type="checkbox"/> The development plan

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1:40–2:30 p.m.	<p>Chapter 3: Internal Alliances: Working with Board and Staff</p> <ul style="list-style-type: none"> <input type="checkbox"/> Working with board members <input type="checkbox"/> Development committee <input type="checkbox"/> Board members and development roles <input type="checkbox"/> Increasing board involvement <input type="checkbox"/> Activity: Helping board members present the foundation <input type="checkbox"/> Other internal collaborations
2:30–2:45 p.m.	<p>Break</p>
2:45–3:45 p.m.	<p>Chapter 4: Community Alliances</p> <ul style="list-style-type: none"> <input type="checkbox"/> Working with professional advisers <input type="checkbox"/> How the foundation benefits <input type="checkbox"/> How the professional advisers benefit <input type="checkbox"/> Balancing natural tensions <input type="checkbox"/> Activity: Attracting professional advisers <input type="checkbox"/> Ways to attract advisers <input type="checkbox"/> Professional adviser council <input type="checkbox"/> Other community relationships
3:45–4:45 p.m.	<p>Chapter 5: Building the Pipeline (Part I)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Prospective donors <input type="checkbox"/> Characteristics of strong donor prospects <input type="checkbox"/> The uniqueness of engagement <input type="checkbox"/> Donor motivations by type <input type="checkbox"/> Diversity of donor base <input type="checkbox"/> Expanding relationships <input type="checkbox"/> Activity: Donor cultivation strategies
4:45–5 p.m.	<p>Wrap Up/Q&A</p>

September 18

7:30–8 a.m.	Continental Breakfast
8–8:45 a.m.	Chapter 5: Building the Pipeline (Part II) <ul style="list-style-type: none"> <input type="checkbox"/> Communications plan <input type="checkbox"/> Challenges in communication <input type="checkbox"/> Messages that resound <input type="checkbox"/> Proximity matters <input type="checkbox"/> Activity: Elevator speech <input type="checkbox"/> Friendraising—building an audience <input type="checkbox"/> Strategies for challenging economic times
8:45–10:30 a.m.	Chapter 6: Gift Planning—the Best Fit <ul style="list-style-type: none"> <input type="checkbox"/> Donor options within a community foundation <input type="checkbox"/> Choices available to planned giving donors <input type="checkbox"/> Understanding the community foundation’s competitive edge <input type="checkbox"/> Key differences between community foundations and private foundations <input type="checkbox"/> Stepping up to planned gifts <input type="checkbox"/> Activity: Donor scenarios
10:30–10:45 a.m.	Break
10:45 a.m.–noon	Chapter 7: Accepting Gifts and Serving Donors <ul style="list-style-type: none"> <input type="checkbox"/> Components of donor services <input type="checkbox"/> Donor reporting and administrative support <input type="checkbox"/> Donor engagement <input type="checkbox"/> Guidelines for donors <input type="checkbox"/> Educating donors <input type="checkbox"/> Donor recognition/recognition societies
Noon–1 p.m.	Working Lunch
1–2:15 p.m.	Chapter 8: Resource Development Goals and Future Trends <ul style="list-style-type: none"> <input type="checkbox"/> Indicators of successful development programs—measuring success <input type="checkbox"/> Raising operating funds <input type="checkbox"/> Near-term concerns <input type="checkbox"/> Future trends <input type="checkbox"/> How can we prepare?
2:15–2:30 p.m.	Review and Wrap Up/Final Q&A