



## Community Foundation Fundamentals Course

September 21- 22, 2013

San Diego, CA

**Saturday, 21, 2013**

8:00 am – 8:30 am	<b>Continental Breakfast</b>
8:30 am – 9:45 am	<b>Welcome, Overview and Introductions</b> <ul style="list-style-type: none"><li>• Overview</li><li>• National Standards for U.S. Community Foundations</li><li>• Activity: Class introductions</li></ul>
9:45 am – 10:00 am	<b>Break</b>
10:00 am – 12:00 pm	<b>Chapter 1: Community Foundation Movement</b> <ul style="list-style-type: none"><li>• History</li><li>• Traditional and emerging roles</li><li>• Unique characteristics</li><li>• Activity: What is a Community Foundation? What is its Mission Statement?</li><li>• Future trends</li><li>• National standards</li><li>• Activity: Community Foundation Scenarios</li></ul>
12:00 pm – 1:00 pm	<b>Lunch</b>
1:00 pm - 1:30 pm	<b>Chapter 2: Governance and Board Composition</b> <ul style="list-style-type: none"><li>• Activity: Fickle Finger of Fate – What Do Boards Do?</li></ul>
1:30 pm – 2:30 pm	<b>Chapter 2: Governance and Board Composition (Cont.)</b> <ul style="list-style-type: none"><li>• Board role and responsibilities</li><li>• Effective meetings</li></ul>
2:30 pm – 2:45 pm	<b>Break</b>
2:45 pm – 3:45 pm	<b>Chapter 3: Resource Development - Donors</b> <ul style="list-style-type: none"><li>• Why donors give to community foundations</li><li>• Activity: Defining the Motivation of Donors</li></ul>

3:45 pm – 4:45 pm	<b>Chapter 3: Resource Development –Gifts</b> <ul style="list-style-type: none"> <li>• Types of gifts</li> <li>• Activity: What’s wrong with this gift?</li> <li>• Gift Acceptance and agreements</li> <li>• Planned giving</li> <li>• Activity: Name that gift!</li> </ul>
4:45 pm – 5:00 pm	<b>Wrap Up</b>

**Sunday, September 22, 2013**

8:00 am – 8:30 am	<b>Continental Breakfast</b>
8:30 am – 10:15 am	<b>Chapter 4: Resource Development - Donor Relations &amp; Attracting Gifts</b> <ul style="list-style-type: none"> <li>• How foundations attract gifts</li> <li>• Strategic Development Plan</li> <li>• Services to donors and advisors</li> <li>• Activity: Cutting Edge Donor Services</li> <li>• Marketing and communications</li> <li>• Activity: Tugs and Pulls / Balancing Competing Interests</li> </ul>
10:15 am – 10:30 am	<b>Break</b>
10:30 am – 12:30 pm	<b>Chapter 5: Legal and Legislative Issues</b> <ul style="list-style-type: none"> <li>• Understanding the Nonprofit Universe</li> <li>• Legal Restrictions vs. Donor Control: Donors</li> <li>• Legal Restrictions vs. Donor Control: Agencies</li> <li>• State Law: UMIFA &amp; UPMIFA</li> <li>• Grantmaking Pitfalls</li> <li>• Legislative Update</li> </ul>
12:30 pm – 1:30 pm	<b>Lunch</b>
1:30 pm – 2:30 pm	<b>Chapter 6: Stewardship, Accountability and Fiduciary Responsibilities (Part I)</b> <ul style="list-style-type: none"> <li>• Stewardship</li> <li>• Fiscal Accountability</li> <li>• Activity: What could possibly go wrong?</li> <li>• Fiscal Policies</li> <li>• Finance/Investment Committee</li> <li>• Communicating Investment &amp; Financial Decisions</li> </ul>

2:30 pm – 3:30 pm	<b>Chapter 6: Stewardship, Accountability and Fiduciary Responsibilities (Part II)</b> <ul style="list-style-type: none"> <li>• Asset Allocation</li> <li>• Spending Rate</li> <li>• Operating budget</li> <li>• Staffing: What's the right mix?</li> <li>• Conflict of Interest</li> <li>• Activity: Conflict of Interest</li> </ul>
3:30 pm – 3:45 pm	<b>Break</b>
3:45 pm – 5:00 pm	<b>Chapter 7: Grantmaking &amp; Community Leadership (Part I)</b> <ul style="list-style-type: none"> <li>• Setting grantmaking priorities</li> <li>• Grantmaking styles</li> <li>• Types of grants</li> <li>• Internal process/plan</li> <li>• External Clarity: communicating grantmaking priorities</li> <li>• Activity: Review Grant Request</li> </ul>
5:00 pm – 6:00 pm	<b>Chapter 7: Grantmaking &amp; Community Leadership (Part II)</b> <ul style="list-style-type: none"> <li>• What CFs Bring to the Leadership Table</li> <li>• Considering all assets when leading</li> <li>• Leadership Roles</li> <li>• Strategic assessment and planning</li> <li>• Leadership, diversity and inclusiveness</li> <li>• Activity: Community Leadership</li> </ul>
6:00 pm – 6:15 pm	<b>Wrap up and Adjourn</b>

## Faculty



Mike Batchelor  
Executive Director, Eerie Community Foundation



Nancy E. Jones  
President, Community Foundation of North Texas



Suzanne S. Friday  
Counsel, Council on Foundations