

community foundation
Bootcamp

inphilanthropy.org/CFbootcamp

CF Bootcamp is a comprehensive overview of the structure and operations of a community foundation. Trainers work with local hosts, which include community foundations and philanthropy-supporting organizations, to deliver a 2-day, 12-hour workshop with robust curriculum. CF Bootcamp is also offered as an accelerated, 1-day course called CF Basics, and can be tailored for each audience.

No matter their role or tenure within the foundation, CF Bootcamp provides tactical information every staff and board member should know.

EXPERIENCED TRAINERS

CF Bootcamp is conducted by a team of experienced trainers—all of whom have led successful community foundations. For more than 25 years, Indiana Philanthropy Alliance (IPA) has housed a dedicated program that offers technical assistance and training to over 70 community foundations in Indiana. IPA now brings this expertise to community foundations across the United States. Go online to bring CF Bootcamp to you: inphilanthropy.org/CFbootcamp.

"I can now answer questions donors might have quickly, correctly, and with confidence."

Community Foundation of Grant County, Indiana

"A great opportunity to learn a variety of tried and true strategies from colleagues in the field."

Community Foundation of the Gunnison Valley, Colorado

"I learned things I didn't know about community foundations, but more importantly, I learned what we are doing well."

Community Foundation of Macon County, Illinois



Invest in yourself with a guide to everything your foundation does and can do in the community.

CF OVERVIEW

- Definition, roles, history
- National Standards
- IRS Code; tax exempt orgs
- Legal concepts & documents

LIFECYCLES

- Major influences in the development of CFs
- Growth cycles
- Future challenges

FUND MANAGEMENT

- Types of funds
- Fund agreements
- Fund management issues
- Fiscal sponsorship
- Donor relations
- Variance power
- UPMIFA code
- Making changes to funds

GOVERNANCE

- Key legal concepts
- Governance vs. management
- Unique challenges of boards
- Board leadership
- Board orientation/education
- Board & executive roles
- Strategic planning

ASSET DEVELOPMENT

- Types of gifts/planned gifts
- Asset building vs. fundraising
- Working with prof. advisors
- Donor characteristics
- Donor stewardship
- Policies and planning

FINANCE & INVESTMENTS

- Fiscal responsibility
- Investment/Finance/Audit committee(s)
- Investment & spending policies
- Working with investment professionals
- Asset allocation
- UPMIFA
- Investment RFP
- Fund accounting
- Financial reports to board
- Operating budget
- Reporting
- Audit
- Tax compliance
- Public support test

GRANTMAKING & COMMUNITY LEADERSHIP

- Grant guidelines/processes
- Responsive and strategic grantmaking
- Legal issues in grantmaking
- Expenditure responsibility
- Scholarship grants
- Types of leadership

OPERATIONAL SUSTAINABILITY

- Asset-expense mismatch
- Fund types as products
- Simple cost analysis
- Fee model of CFs
- Calculating sustainability
- Developing a plan
- Improving sustainability