

Indiana Philanthropy Alliance

**GIFT**

**2018 PROGRAM**

**AND SERVICES**



The GIFT Technical Assistance Program is a signature program of Indiana Philanthropy Alliance. The GIFT team offers technical support, professional development and educational opportunities to board and staff members on all aspects of leading a community foundation.

“GIFT” is the acronym for Giving Indiana Funds for Tomorrow, the program founded by Lilly Endowment Inc. in 1990 to help Indiana communities establish or strengthen community foundations. The purpose was to help Indiana create a lasting legacy of self-reliance for addressing local problems. To date, over \$1 billion has been invested in the work of community foundations.

The GIFT team is here to serve Indiana community foundations. We do this in many ways. This guide can help you connect with the resources that are right for you.

### THE GIFT TEAM

Rosemary Dorsa, GIFT Director  
[rdorsa@inphilanthropy.org](mailto:rdorsa@inphilanthropy.org)  
317.630.5200 ext. 114

Terri Johnson, GIFT Associate Director  
[tjohnson@inphilanthropy.org](mailto:tjohnson@inphilanthropy.org)  
317.630.5200 ext. 128

Jalen Roseberry, GIFT Program  
Coordinator  
[jroseberry@inphilanthropy.org](mailto:jroseberry@inphilanthropy.org)  
317.630.5200 ext. 129

Sonya Hallett, GIFT Consultant  
[shallett@inphilanthropy.org](mailto:shallett@inphilanthropy.org)  
317.630.5200 ext. 120

Belinda Gray, GIFT Consultant  
[bgray@inphilanthropy.org](mailto:bgray@inphilanthropy.org)  
317.900.3000

### TECHNICAL ASSISTANCE BY PHONE AND EMAIL

#### Quick Response

You can call or email anytime, with any type of question – donor issues, grants, finances – anything at all. It might be a question we can respond to easily by email or it might be a more complex matter requiring some research and a few conversations. We may handle it directly or connect with one of our consultants. Either way, we want you to contact us.

## Expert Resources

The GIFT team can respond to many of your questions, but sometimes more specialized knowledge is required. GIFT has a team of consultants we can provide to you for legal questions, HR issues, executive transition, etc. Contact Rosemary for access to GIFT consultants.

### Quick response to legal questions

GIFT provides up to one hour of free legal consultation per issue. GIFT uses Phil Purcell and Zac Kester as our legal advisors for quick questions. If you have a question that you think needs a legal answer, here's how you do it:

Send an email to Rosemary with details about your situation/question. Assuming it's not something the GIFT team can answer (and it usually isn't), Rosemary will forward it to Phil or Zac with a request that they set up a time to talk with you.

If you have an issue that requires more than one hour of attention, you will need to engage legal counsel (Phil, Zac or other) to assist you.

### Assistance for your board during a leadership transition

The moment when a CEO announces a departure or retirement is a stressful one for the board. GIFT is able to provide a few hours of phone consultation at no cost for board members with Bryan Orander, a consultant with deep experience in this area, to talk through next steps. Contact Rosemary if you would like to make arrangements to talk with Bryan.

### Human resource assistance

Indiana community foundations have grown significantly in recent years and have added many new staff members. We have noticed an increase in questions related to human resource management. So, we have added another resource for you. Jeremy York, InvigorateHR, has a relationship with GIFT to assist you in this area. Contact Rosemary to be connected to Jeremy.

## TRAINING PROGRAMS

Each year, GIFT provides a program of webinars and in-person trainings. The annual calendar is developed based on requests from the field and in response to issues and challenges that come to our attention. See calendar attached for 2018 offerings.

2018 is the year for the biannual Indiana Philanthropy Alliance's two-day statewide conference. This year's conference will be on June 7-8 at the Indianapolis Marriott North.

GIFT Boot Camp is our signature program. It is a two-day training program on the operations of a community foundation. Appropriate for any staff or board member, it is offered twice each year in Indianapolis.

CF Basics is a one-day (6 hours) version of Boot Camp offered around the state for groups of 25 or more. Community foundations usually work in regional groups to assemble a large enough group. There is a cost of \$500 for this program. Contact Rosemary to discuss a CF Basics program in your area.

Any portion of the Boot Camp/CF Basics material can be used for a briefer customized program for your foundation. See below.

Boot Camp/CF Basics materials are posted on the website and may be used by any Indiana community foundation for board or staff training. There is a very abbreviated version that provides the core for a board orientation program.

### **CUSTOMIZED ON-SITE PROGRAMS**

The GIFT staff and consultants are available to visit with staff and/or board members for a variety of programs. It could be a very structured training activity, a facilitated board conversation or a meeting with staff. We are open to whatever is helpful to you.

GIFT is able to provide a one-time visit on a particular topic. GIFT is not able to support an ongoing project such as a strategic planning process. For assistance with that, you would need to engage a consultant. GIFT can provide you with references to consultants that have experience working with community foundations.

The 2017 GIFT consultant team

- Tony Macklin
- Steve Alley
- Jim Klusman
- Ellen Annala

Contact Rosemary to discuss a visit from a GIFT team member or consultant.

### **BOARD RESOURCES**

GIFT provides resources for boards in addition to customized on-site programs and standardized training.

In 2018, GIFT would like to provide enhanced support for current or incoming board chairs/presidents. We know this role can be pivotal to a high functioning board and many find this role to be more challenging

than expected. We have developed a facilitated discussion program for board chairs and would be interested in providing this to a group of these individuals. This could be Leadership Day activity or for an ad hoc group of foundations who would like to do this.

Board training is a never-ending activity. Our colleagues in Kansas have created a series of board training videos to assist with this. While access to this is typically priced at \$250/person, GIFT has an agreement with Kansas that allows an Indiana community foundation to access the series for use in a group setting for \$1,500 for the first year, with a \$300 annual renewal. In 2018, GIFT will provide a \$500 subsidy for up to 10 foundations, bringing the first year cost to \$1,000.

## NETWORKING

GIFT holds an annual Leadership Retreat for all the community foundation executives. Also, there are seven regions in the state and each organizes events in the region during the year. GIFT is available to provide presentations or other content to support regional events.

## ONLINE RESOURCES

### IPA Website

The IPA website ([www.inphilanthropy.org](http://www.inphilanthropy.org)) has lots of great resources for you. Just click on “GIFT” on the top menu and select “Resources” and you will see all the topics. Recorded webinars are also available on the website. See attached instructions for how to access.

Here is the link to the complete directory of Indiana community foundations that is always available on the website (<https://www.inphilanthropy.org/gift>) and click on “Roster of Indiana Community Foundations”.

### e-booklets

GIFT works with EDS, a firm specializing in marketing planned giving, to provide you with thirty-two e-booklets on planned giving. They can be accessed on the IPA website under GIFT Resources. The e-booklets may not be posted to your foundation’s web site.

### Listserves

GIFT manages the listservs for the following groups. Contact Belinda or Sonya if you would like to join a listserv.

- CF CEOs
- CF Asset Development and Marketing
- CF Program and Grants
- CF Finance and Administration
- CF Scholarships
- Crescendo Users
- FIMS Users
- Office Managers
- Pearl Users

## **Dropbox**

GIFT manages a Dropbox resource to enable listserv participants to upload and view sample documents with each other. This resource is a “self-serve” sharing platform that will alleviate attaching and sharing documents through listserv emails. To use the Dropbox resource, you must be a member of a GIFT listserv. When you join a GIFT listserv, you will be added to Dropbox and will receive an email with further instructions on how to use the GIFT Dropbox resource.

## **BENCHMARKING**

GIFT prepares the annual “Snapshot” report with data on Indiana community foundations. This data is compiled through survey conducted during the first quarter of each year. The Snapshot reports are available on the IPA website. Because of our relationship with CF Insights, we have ten additional benchmarking reports available that include national peer benchmarks. You can access these reports through your login on CF Insights.

## **COMMUNITY FOUNDATION INTERNS**

GIFT administers a Lilly Endowment grant which provides paid internships for any Indiana community foundation. Contact Terri or Sonya for more information.

## **FOUNDATION LEGAL HELP DESK (OPTIONAL SERVICE)**

GIFT operates an optional fee-based service, the Foundation Legal Help Desk. Through a web portal subscribers have direct access to an attorney for quick answers to legal questions. Contact Rosemary or Belinda for more information about the Foundation Legal Help Desk.

## ACCESSING ONLINE RESOURCES

### How to find recorded webinar

To access recorded webinars, log into the Indiana Philanthropy Alliance/GIFT website at [www.inphilanthropy.org](http://www.inphilanthropy.org) with your username and password (if you need help logging in, contact Jalen). Once you are logged in, click on “Resources” located on the blue menu bar at the top of the page. This will bring up the “Resources Search” page. On the right hand side of the screen you will see a drop down menu labeled “Resource Type.” From this drop down menu, choose “Webinar Recording.” Webinar recordings from newest to oldest will be displayed on the screen. Scroll through to select which webinar recording you’d like to listen to. Contact Jalen if you have any questions.

### Dropbox instructions

Dropbox is a free service that can be downloaded to anyone’s computer. Go to [www.dropbox.com](http://www.dropbox.com) to install Dropbox free on your computer. After installing the desktop application on Windows, the GIFT Dropbox folder and subfolders will be located inside the folder with your user name (such as C:\Users\Panda\Dropbox). It may also appear in your Favorites list in Windows Explorer. Another easy way to open the folder is to click on the Dropbox icon in your system tray and then click Dropbox Folder in the pop-up panel.

Once you have Dropbox on your computer you can upload documents to the GIFT Dropbox subfolders. GIFT will invite all members of its listservs to participate in Dropbox via email. Any files that are uploaded to the GIFT Dropbox will be available for all participants to access whenever they need them. This resource is a “self-serve” sharing platform that will alleviate attaching and sharing documents through listserv emails.

Once the GIFT Dropbox folder and subfolders are shared with you, you can upload sample documents, information collected via Listserv postbacks, etc. to one of the subfolders listed below (additional subfolders will be added as necessary):

# GIFT CONTACT INFORMATION



## QUICK REFERENCE LIST

Anyone on the GIFT team is happy to talk with you on any topic, but this list may help if you are not certain who to contact. When in doubt, call Jalen and she can get you connected to the right person.

GIFT TEAM MEMBERS	
Rosemary Dorsa, GIFT Director	317.630.5200 ext. 114 <a href="mailto:rdorsa@inphilanthropy.org">rdorsa@inphilanthropy.org</a>
Terri Johnson, GIFT Associate Director	317.630.5200 ext. 128 <a href="mailto:tjohnson@inphilanthropy.org">tjohnson@inphilanthropy.org</a>
Jalen Roseberry, GIFT Program Coordinator	317.630.5200 ext. 129 <a href="mailto:jroseberry@inphilanthropy.org">jroseberry@inphilanthropy.org</a>
Sonya Hallett, GIFT Consultant	317.630.5200 ext. 120 <a href="mailto:shallett@inphilanthropy.org">shallett@inphilanthropy.org</a>
Belinda Gray, GIFT Consultant	<a href="mailto:bgray@inphilanthropy.org">bgray@inphilanthropy.org</a> 317.900.3000

SUBJECT	CONTACT PERSON
Requesting on-site consultation visits	Rosemary
Events/registration	Jalen
Website, Dropbox or listservs	Belinda or Sonya
CF Insights data	Terri
Community Foundation Internships	Terri
Phone/email consultation regarding: <ul style="list-style-type: none"> <li>• Governance/Board Management</li> <li>• Asset Development/Gifts</li> <li>• Fund Management/Fund Agreements</li> <li>• Finance and Investments</li> <li>• Grants and Community Leadership</li> <li>• Scholarships</li> <li>• Legal questions</li> <li>• Human resource management</li> <li>• Marketing and Communications</li> </ul>	Rosemary or Terri Rosemary or Terri Rosemary or Terri Terri Rosemary or Terri Rosemary or Terri Rosemary Rosemary, Terri or Sonya Sonya