



# COMMUNITY FOUNDATION TRAINING

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

Community foundations are complex organizations. For more than 25 years, Indiana Philanthropy Alliance (IPA) has housed a dedicated program (GIFT Technical Assistance) that offers specialized assistance to over 90 community foundations in Indiana. These foundations have achieved impressive sustainability, play significant leadership roles in communities, and have grown their assets to almost \$4 billion.

As part of the GIFT program, IPA has developed a highly-regarded curriculum for community foundations nationwide. This training provides a comprehensive overview of the structure and operations of a community foundation.

IPA's standard training curriculum is offered in two formats: Community Foundation Boot Camp (12 hours) and Community Foundation Basics (6 hours).

Not only has this training been presented to foundation staff and boards in Indiana, IPA has trained participants across the country in partnership with United Philanthropy Forum, Southeast Council of Foundations, Iowa Council of Foundations, League of California Community Foundations, Philanthropy Colorado, North Carolina Network of Grantmakers, Florida Philanthropic Network, and more.



IPA's GIFT Technical Assistance team continues to offer this training to Indiana community foundations at a deeply discounted rate. IPA members may contact Amy Haacker at [ahaacker@inphilanthropy.org](mailto:ahaacker@inphilanthropy.org) to learn more.

## CURRICULUM

### 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

Go online to view scheduled events:  
[inphilanthropy.org/CFtraining](http://inphilanthropy.org/CFtraining)