



INDIANA PHILANTHROPY ALLIANCE ♦ COUNCIL OF MICHIGAN FOUNDATIONS ♦ PHILANTHROPY OHIO

present

## TRI-STATE COMMUNITY FOUNDATION PARTNERSHIP 2015 WEBINAR SERIES

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**Designed for community foundations but all are welcome to participate.**

**Cost: \$35 for Tri-State partnership members  
\$50 for members of other associations**

### **STAYING LEGAL WITH DONOR-ADVISED FUNDS AND SCHOLARSHIPS ♦ JANUARY 21 ♦ 1:00-3:00 PM ET**

*Phil Purcell, J.D., Vice President, Ball State University Foundation*

The Pension Protection Act of 2006 (PPA) created many changes, particularly in the administration of donor advised and scholarship funds. It is essential that any community foundation involved in these activities have a thorough understanding of the Pension Protection Act and its implications for fund management. (Indiana) [Free for IPA members]

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### **COMMUNITY LEADERSHIP 101 ♦ FEBRUARY 11 ♦ 1:00-2:30 PM ET**

*Deborah Ellwood, Executive Director, CFLeads*

What is “community leadership” and how does it help community foundations be more effective? Join us for an introduction to community leadership using the Framework for Community Leadership and Community Leadership Framework Toolbox. (Michigan)

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### **HOW TO CHANGE A FUND ♦ MARCH 18 ♦ 1:00-3:00 PM ET**

*Phil Purcell, J.D., Vice President, Ball State University Foundation*

Do donors ever ask to make a change to a fund? Have you ever said “yes” to a fund you wish you hadn’t? What about funds that are too small and too old? How does variance power really work anyway? This webinar will clear up the mysteries about changing funds – what you can do, what you can’t, and the proper procedures to make sure it’s all legal. (Indiana) [Free for IPA members]

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### **THE UNRESTRICTED GIFT – A STRATEGIC APPROACH ♦ APRIL 8 ♦ 1:00-2:00 PM ET**

*Suzanne Allen, Ph.D., President, Philanthropy Ohio*

Planning the conversation is what Ken Burnett – in his classic work Relationship Fundraising – calls the essential foundations of fundraising. Planning creates a clear path to raising unrestricted funds. In this webinar, you hear from experts who understand that engagement, honesty and openness are critical to success. They’ll share their stories and ideas to help build trust and share your goals with your donors. (Ohio)

### **ENGAGING IN PUBLIC POLICY ♦ MAY 13 ♦ 1:00-3:00 PM ET**

*Claudia Herrold, Vice President of Communications and Public Policy, Philanthropy Ohio; other presenters TBA*  
Understand your responsibility and capacity for leadership in the public policy arena. This webinar will provide you with tangible examples from peer community foundation representatives. After reflecting on their initial fears and motivations for engaging in advocacy, co-presenters will describe the nuts and bolts of the work and outline the metrics they use to evaluate success. (Ohio)

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### **COMMUNITY PROJECT FUNDS ♦ JUNE 17 ♦ 1:00-3:00 PM ET**

*Phil Purcell, J.D., Vice President, Ball State University Foundation*

A local service organization would like you to collaborate on a much needed community project. A dedicated person wants to raise money to pay them to deliver services to seniors your community. They want to set up a pass-through fund with your foundation to handle charitable contributions. We've all been there. When should you do this? What are the legal responsibilities for the community foundation? How do you handle the finances? (Indiana) [Free for IPA members]

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### **DATA VISUALIZATION: COMMUNICATING YOUR STORY THROUGH GRAPHICS AND DASHBOARD REPORTS ♦ AUGUST 12 ♦ 1:00-2:30 PM ET**

*Melissa Frey, Muskegon County Community Foundation*

Are you telling your foundation's story in a way that demands attention and increases understanding? Our brains process images 60,000 times faster than text. Learn how to turn your data into a compelling picture. At this workshop you will learn why visualizing data is important, see some examples of great infographics, review tips for creating the right graphic for your data, and explore some tools for creating stunning graphics. (Michigan)

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### **ABC LITE ♦ SEPTEMBER 9 ♦ 1:00-3:00 PM ET**

*David Lindberg, Chief Financial Officer, Council of Michigan Foundations*

*Terri Johnson, Associate Director, GIFT, Indiana Philanthropy Alliance*

*Steve Phallen, Vice President of Finance and Administration, Philanthropy Ohio*

*ABC Lite users TBA*

This webinar will introduce a 'lite' version of the Activity-based Costing tool developed over a decade ago by CF Insights. It will enable smaller community foundations a tool to analyze the profitability of products and services they provide, leading to improved sustainability decisions. During this webinar you'll learn how to use the tool and hear from foundations that have used the product. (Michigan)

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### **MAKING A SOFTWARE CHANGE ♦ OCTOBER 14 ♦ 1:00-3:00 PM ET**

*Presenters TBA*

With the recent changes in the software industry the last several years and the need to enhance the donor's online experience, some community foundations have been transitioning to new software enterprise systems. Hear from foundations that have transitioned from FIMS to Blackbaud and Stellar, the analysis they went through, how the transition went and how they feel today about the decision. (Michigan)

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### **STARTING A GIFT ANNUITY PROGRAM ♦ NOVEMBER 11 ♦ 1:00-3:00 PM ET**

*Phil Purcell, J.D.; Vice President, Ball State University Foundation*

Charitable gift annuities (CGA) are widely used planned giving vehicles. With interest rates so low, CGAs can be attractive to those donors who need a stream of income and have assets to donate. However, before starting a CGA program there are many things to consider. You will gain insight into the development, administration, and marketing of CGA programs. (Indiana) [Free for IPA members]