



# COMMUNITY FOUNDATION TRAINING

[INPHILANTHROPY.ORG/CFTRAINING](http://INPHILANTHROPY.ORG/CFTRAINING)

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 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 this program, IPA has developed a highly-regarded curriculum for community foundations that it offers to audiences across the United States.

This training provides a comprehensive overview of the structure and operations of a community foundation. It has been presented by IPA to over a thousand participants in partnership with the United Philanthropy Forum, Southeast Council of Foundations, Iowa Council of Foundations, League of California Community Foundations, Philanthropy Colorado, North Carolina Network of Grantmakers, and the Florida Philanthropic Network.

IPA is pleased to work with individual foundations, philanthropy-serving organizations, or other groups interested in hosting a training.

Training is provided on-site at your location of choice or virtually. The standard curriculum is offered in two formats: Community Foundation Boot Camp (12 hours) and Community Foundation Basics (6 hours). Periodically, IPA offers national training sessions open to all.

Contact Rosemary Dorsa at [rdorsa@inphilanthropy.org](mailto:rdorsa@inphilanthropy.org) to begin a partnership. Go online to view upcoming events, pricing, or subscribe to our mailing list: [www.inphilanthropy.org/CFtraining](http://www.inphilanthropy.org/CFtraining)

## 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