

Aligning Community Leadership with Community Foundation Strategy

May 10, 2018

GIFT Deep Dive Day

Who is in the Room?



#24: The Board Displays Community Leadership



Excellence. Accountability. Impact.™

A community foundation identifies and addresses community issues and opportunities.

It *strives* to serve in leadership roles, including convening, and to assess the impact of its community leadership.

I. Our “Works in Progress” Case Studies

Bill Barnes

President & CEO

**Community Foundation of
Madison & Jefferson County**

Patty Grant

Executive Director

**Community Foundation of
Wabash County**

Dawn Brown

President/CEO

**Community Foundation of
Grant County**

Cathy Weatherspoon

Executive Director

**Thriving Families Thriving
Grant County**



- Founded in 1991
- Endowed Assets of \$25M
- 2018 Grants >\$830,000,
28% Unrestricted
- 3 Full Time Staff Members
- 215 Endowed Funds

- What about the Arts?
 - Funding
 - Organization and Advocacy
 - Marketing
- Convened artists in 2012
- Blue Sky Committee in 2013
- Madison Area Arts Alliance in 2014
- IAC Designated Art and Culture District in 2015
- Today our Creative Community has a seat at the table with increased exposure, opportunities, and funding



- What now???
- Strategic plan and grant making impact
 - Gazillion nonprofits in Jefferson County
 - Less than gazillion dollars in unrestricted
 - Small staff
 - Board engagement



Community Foundation of Wabash County

We're here for giving. We're here for good.

The Community Foundation is committed to providing leadership and service in realizing cherished values for Wabash County; independence, self-reliance, enterprise, prosperity, dignity of every individual, and equality of opportunity.

Founded in 1954

Assets of over \$50 Million

\$3.2 Million in Annual Grants

5.5 FTE Staff Members

Over 350 Funds Served

2012 Aspiration Statement re: Programming

- ▶ **The Foundation commits to the expansion of its programmatic role by becoming more intentional in identifying and addressing key community needs and opportunities**
 - ▶ *Convening* members of the community to create common understanding of important issues
 - ▶ *Organizing* members of the community to address important issues
 - ▶ *Allocating* its discretionary grant funds and human resources to address important issues
 - ▶ *Advocating* for change in areas of importance to the community
 - ▶ *Identifying* sources of additional funding for important issues, including individual donors, businesses, and other foundations

2012 Aspiration Statement re: Community Leadership

- ▶ **The Foundation commits to an expansion of its community leadership role by integrating its asset development and programmatic capabilities to enhance its community impact**



2012 Strategic Impact

- ▶ **To advance the level of educational attainment as the driver of economic opportunity and prosperity:**
 - ▶ To lift families from poverty to prosperity
 - ▶ To acquire the nearly 16,000 new worker jobs open in our region by 2023
 - ▶ To influence aspirations – to articulate a vision of the County’s future as education dependent
- ▶ **The Foundation will allocate 50% of its discretionary grant funds to programs and initiatives aimed at advancing the level of educational attainment**



Education Impact Strategies

▶ **Early Childhood Coalition**

- ▶ Leading a broad coalition of stakeholders to design a multi-year plan to invest in quantity, quality, accessibility, and affordability of early childhood education. Every child enters kindergarten ready to learn.

▶ **Early Award Scholarship Program**

- ▶ Based on identity-based motivation theory and research evidence regarding the power of assets to influence student aspirations and parent expectations. Rewarding quarterly small amounts for in-school accomplishments, savings, and college-preparedness activities. Preliminary results demonstrate positive impact on learning and savings. Children aspire and are able to pursue education.

▶ **Studies For Advancement**

- ▶ To create a meaningful and trustworthy research base that will enable each school district to determine the best ways to meet educational needs, to provide outside expertise to help the districts explore shared interests.



BLACKMON LEADS HOOSIERS TO WIN

Marion grad scores 24 points in IU victory over Minnesota. >> SPORTS, B1



TUESDAY, FEBRUARY 17, 2015

Chronicle-Tribune

WWW.CHRONICLE-TRIBUNE.COM

Serving Grant County since 1867. \$1.00

TODAY'S WEATHER

Cloudy

22
8



Scrapbook:
Monday's high: 9
Low: 2
Last Feb. 17:
High: 30
Low: 18
Record since 1903:
High 67, 1911
Low -11, 1903
Precipitation:
Feb. 16: 0.00 (as of 7 a.m.)

Inside:
More weather, Page A2



YMCA undergoing

County tops state in child poverty

One in three local children impoverished

BY JILLIAN FELLOWS
jfellows@chronicle-tribune.com

Among all the counties in Indiana, Grant County has the highest percentage of children living in poverty.

According to the 2015 Kids Count report released on Monday, Grant County has a 33.3 percent rate of children living in poverty. That is significantly higher than the state's average of 21.9 percent and the nation's average of 22.2 percent.

The most recent Kids Count statistics also shows

a large year-to-year difference in the poverty data. Grant County's percentage of children living in poverty jumped from 26.6 percent in 2012 to 33.3 percent in 2013. In comparison, Hamilton County recorded the lowest rate of children living in poverty in Indiana at 6.1 percent.

"With poverty, there is no one explanation," said Bill Stanczykiewicz, CEO of the Indiana Youth Institute (IYI). "Human behavior is very complicated. There are several things to look at."

Stanczykiewicz said two of the biggest factors in childhood poverty data are economic changes and family structure.

"Our good neighbors in

Marion know more than most the transformation in the economy over the last 20 years or so," Stanczykiewicz said.

Andrew Sprock, Circles of Grant County director, said children from single parent families are more likely to live in poverty.

"One of the contributing factors is that we do have a lot of single parent families and the likelihood of someone being in poverty is higher of they are in a single parent home. It's difficult to manage a family and have an income that would be equal to two parents," he said. "There are times when we can overlook the emotional strain of poverty. It just means there is a greater need for

Grant County Economic Well-Being data

	2010	2011	2012	2013
Percent of children living in poverty, age 0-17:	29.7	25.5	26.6	33.3
Percent of students receiving free lunches:	43.6	48.5	49.5	51.7
Monthly average # of people issues food stamps:	10,807	12,206	13,047	13,458
Annual average unemployment rate %:	11.4	10.3	9.4	8.8
Percent of food insecure children:	24.3	24	23.7	N/A

our community to be attentive and supportive of all the needs of kids. We need to work hard as a community to provide support that

also gives them dignity and doesn't result in them feeling dependent of like

See POVERTY / Page A3

IYI PAINTS THE FULL PICTURE

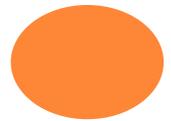
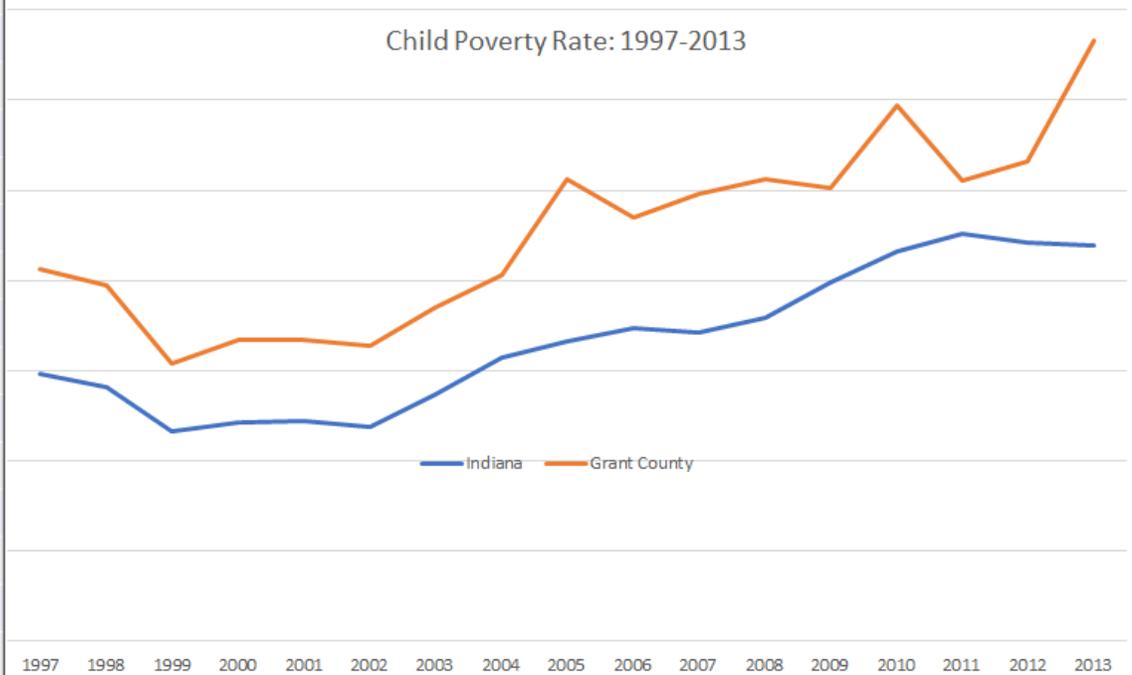


Child Poverty – Over Time

The Indiana Youth Institute

Grant County		
Year	# Children in Poverty	% Children in Poverty
1997	3,527	20.6%
1998	3,354	19.7%
1999	2,637	15.4%
2000	2,846	16.7%
2001	2,828	16.7%
2002	2,753	16.4%
2003	3,067	18.5%
2004	3,286	20.3%
2005	4,064	25.6%
2006	3,602	23.5%
2007	3,597	24.8%
2008	3,666	25.6%
2009	3,617	25.1%
2010	4,375	29.7%
2011	3,722	25.5%
2012	3,824	26.6%
2013	4,723	33.3%

Child Poverty 2013 & 2014		
	2013	2014
Indiana	22.2%	21.5%
Grant County	39.5%	35.1%



PRECONDITIONS FOR SUCCESS



- Do we have influential champions?
- Is there a shared sense of urgency around the issue?
- Are there adequate resources?
- Do we manage our decline or co-create our future?



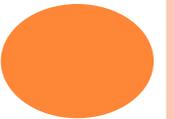
COLLECTIVE IMPACT IS...



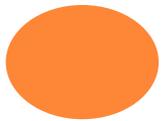
- The commitment of a group of important actors from different sectors to a common agenda for solving a specific social problem.
- Sustained by a centralized infrastructure, a dedicated staff, and a structured process that helps create the conditions for success.
- **A process that enables communities** to address complex social and environmental issues such as education, poverty, and health.
- **A large –scale social change** comes from better cross-sector coordination rather than isolated intervention of individual organizations.



BEFORE COLLECTIVE IMPACT



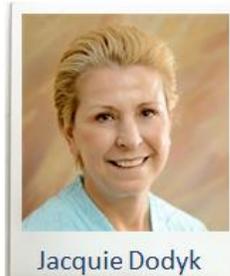
AFTER COLLECTIVE IMPACT



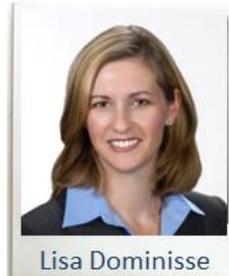
A GUIDING TEAM WAS FORMED



Dawn Brown



Jacquie Dodyk



Lisa Dominisse



Beau Hamner



Alicia Hazelwood



Kylie Jackson



Alex Huskey



Tammy Pearson



Tab McKenzie

They've been dreaming "What if?" dreams all year about what Grant County could be if we all work together, and we want to share some ideas with you today for your consideration and we hope for action to make our dreams come true for all of us.



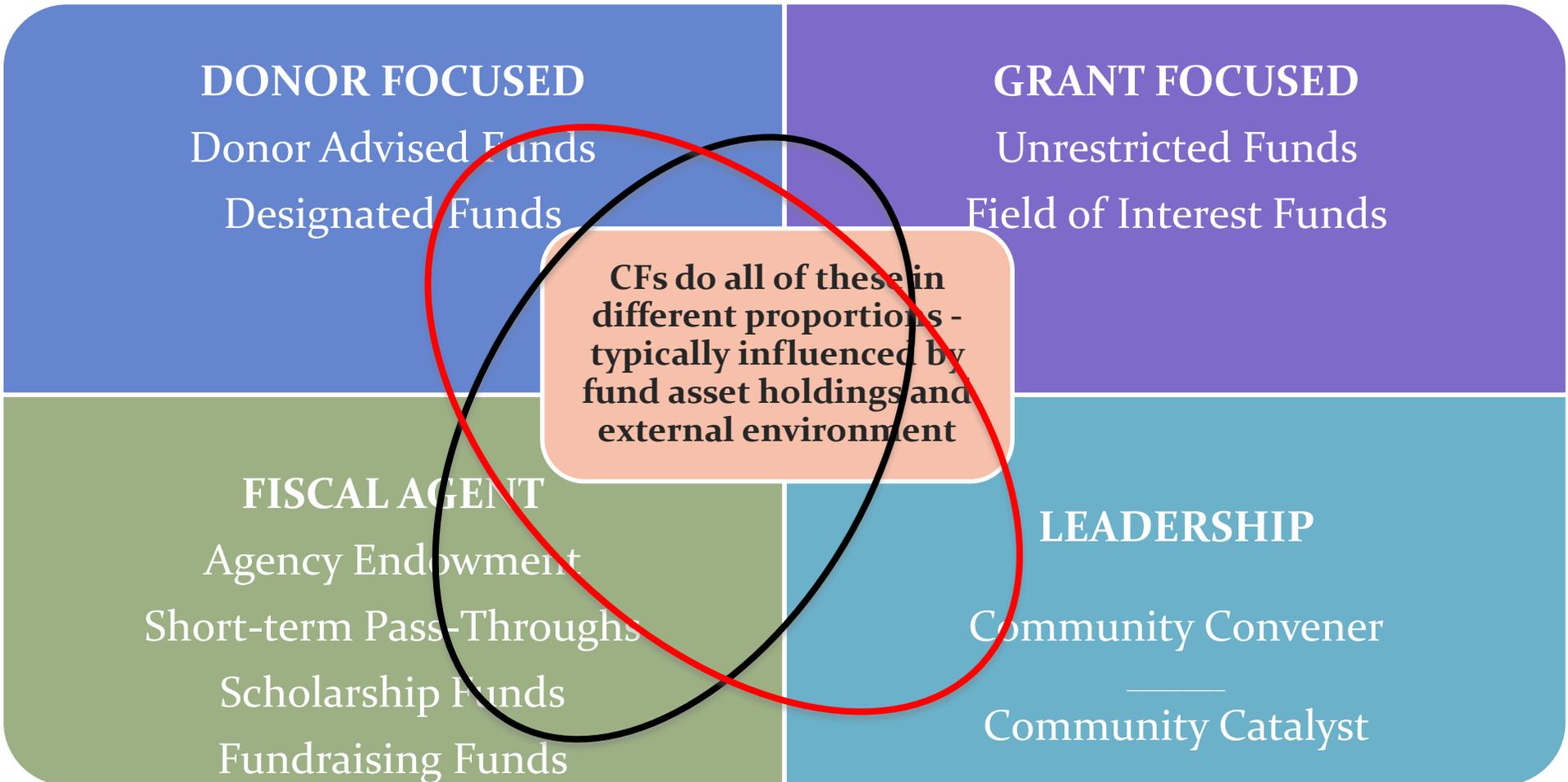
THE WHEEL...THE VISION



2. Business Model Lens



4 Operating Models



State of the CF Field: Are we sustainable?

Does our business model fit the kind of CF we want to be?

Particularly challenging for those engaged in leadership, if:

- CF is “small” (under \$500-million in assets),
- CF doesn't have significant flexible resources,
- CF has many highly transactional funds.



1. What is the dominant operating model in your history? In your next few years?
2. How has the model influenced your vision, mission, strategic plan?
3. How do you play to its strengths as you decide on leadership opportunities?
4. How might it create unintentional challenges for leadership work?

At Your Tables: Quick Round



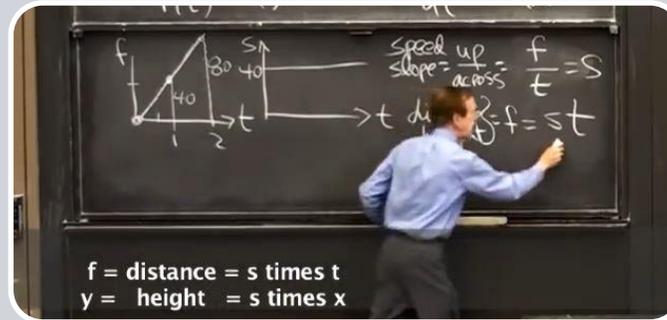
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*Culture trumps
strategy, every time*

3. Culture Lens

Source Codes of Foundation Culture



Officers
Due
diligence

Educated
experts
Structure

Metrics
Control



Strategic Biases or Problem-Solving Styles

Buyer

Primary lever for change:
effective programs

Builder

Primary lever for change:
strong nonprofits

Innovator

Primary lever for change:
ideas and talent

Rule Changer

Primary lever for change: root causes and connections between public, private, philanthropic systems

Stimulus for Private Action

Primary lever for change: empowering and leveraging citizens, investors, private sector



*Often less
risk tolerant*



*Often **more**
risk tolerant*



1. What strategic bias is most natural to *you*? How about rest of staff?
2. What's your board's culture related to risk and leadership work? How are you helping that culture evolve?
3. How are you assessing board members' strategic biases and risk tolerances? Navigating the differences between them?

At Your Tables: Quick Round



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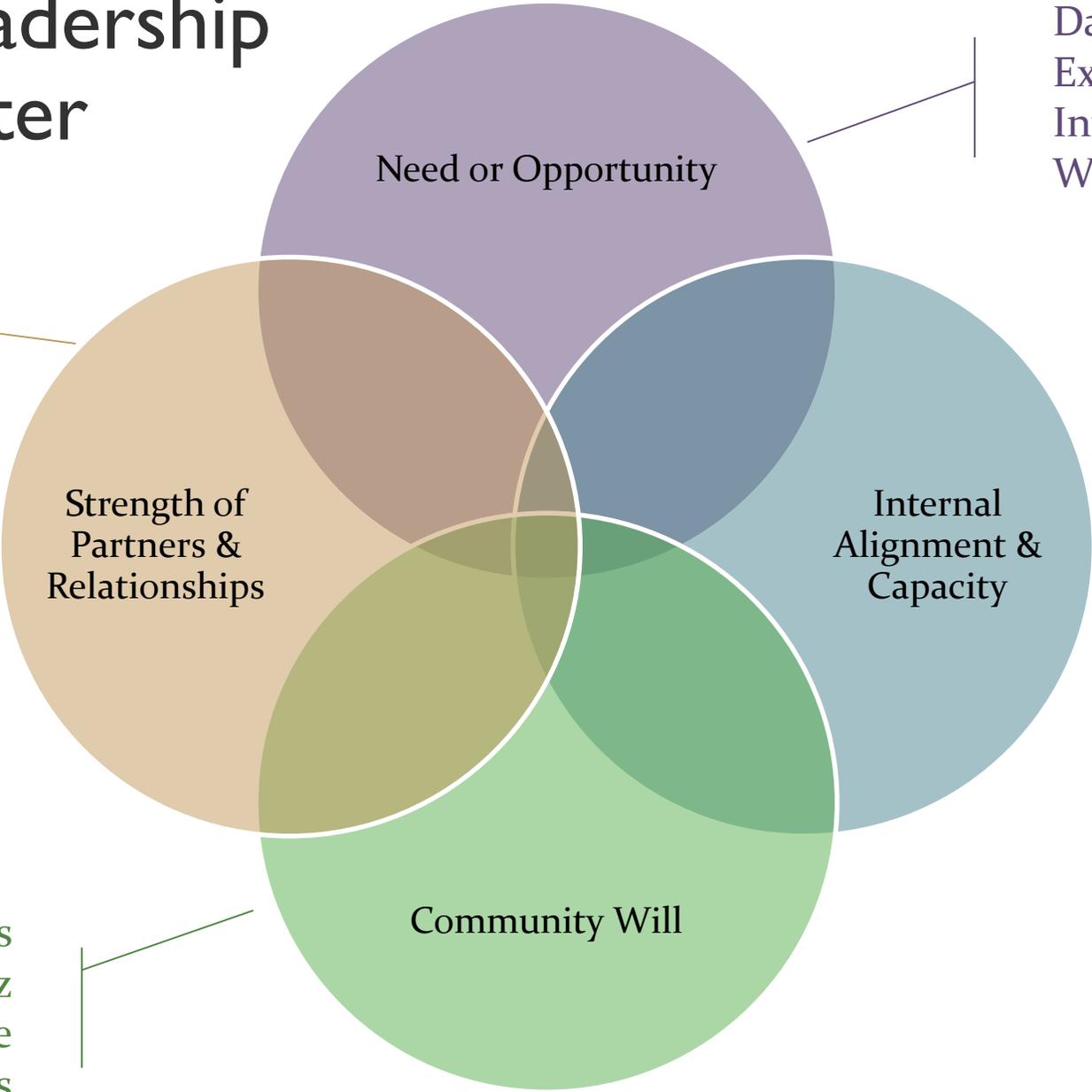
Lunch Time!

4. Opportunities: External Lens



Community leadership opportunity filter

Nonprofit, gov't, biz
Coalitions
Donors & funders
Gaps in roles
Credibility & trust



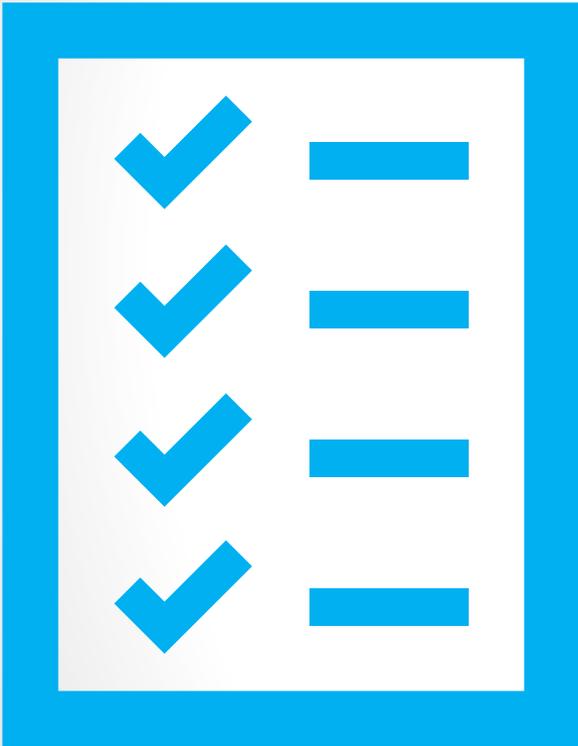
Data trends, forecasts
Existing initiatives
Internal & external catalysts
What else is going on

Local politics
Civic energy & buzz
Risk tolerance
Timing & ripeness



1. How do you assess new opportunities and issues – when to say yes or no to playing a leadership role?
2. Who plays what roles?
3. What criteria do you use to re-assess the opportunity along the way?

At Your Tables



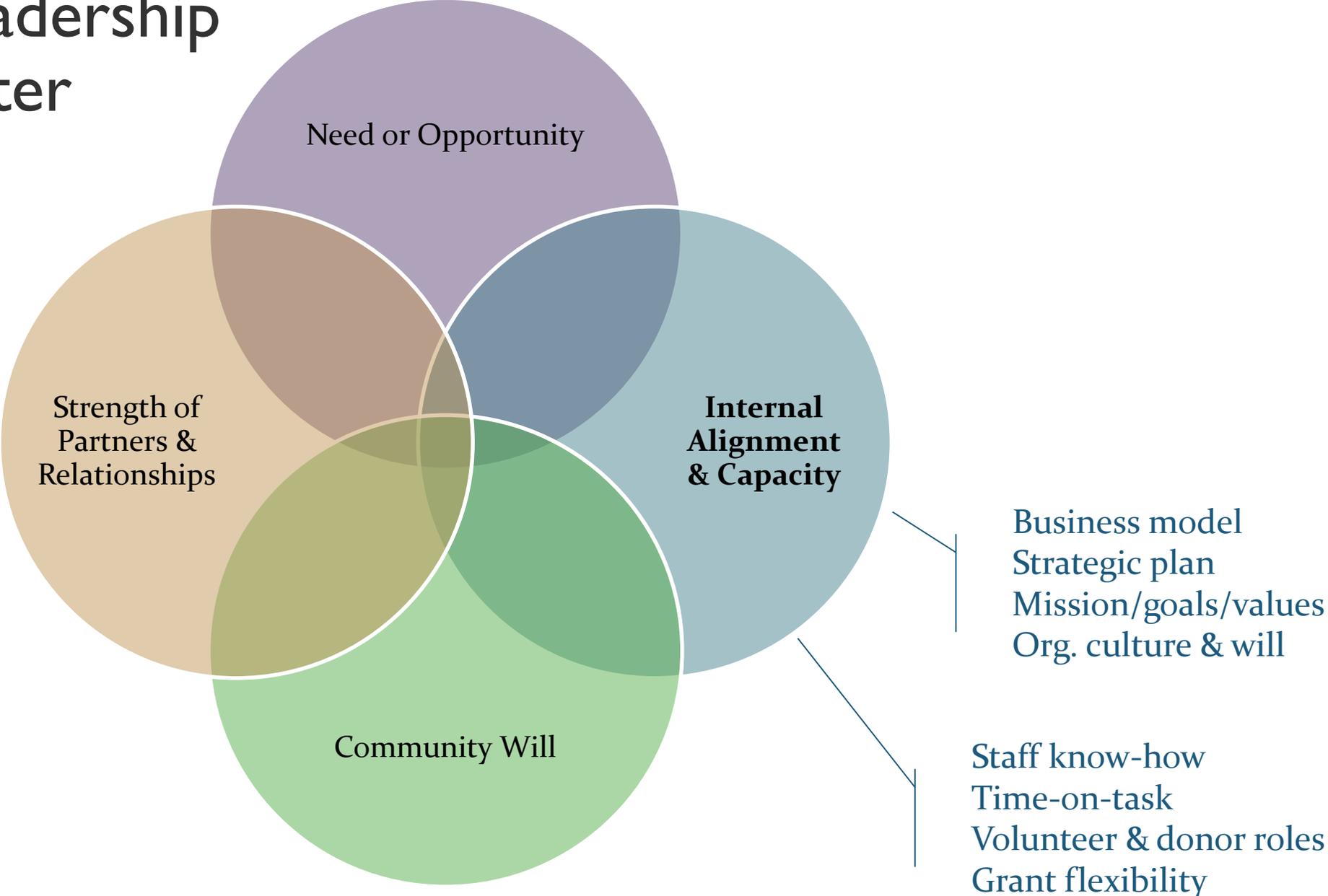
Review your own leadership opportunity or work through the Opportunity Filter.

- Strengths and weaknesses?
- What do you need to learn next?
- What relationships need strengthened?

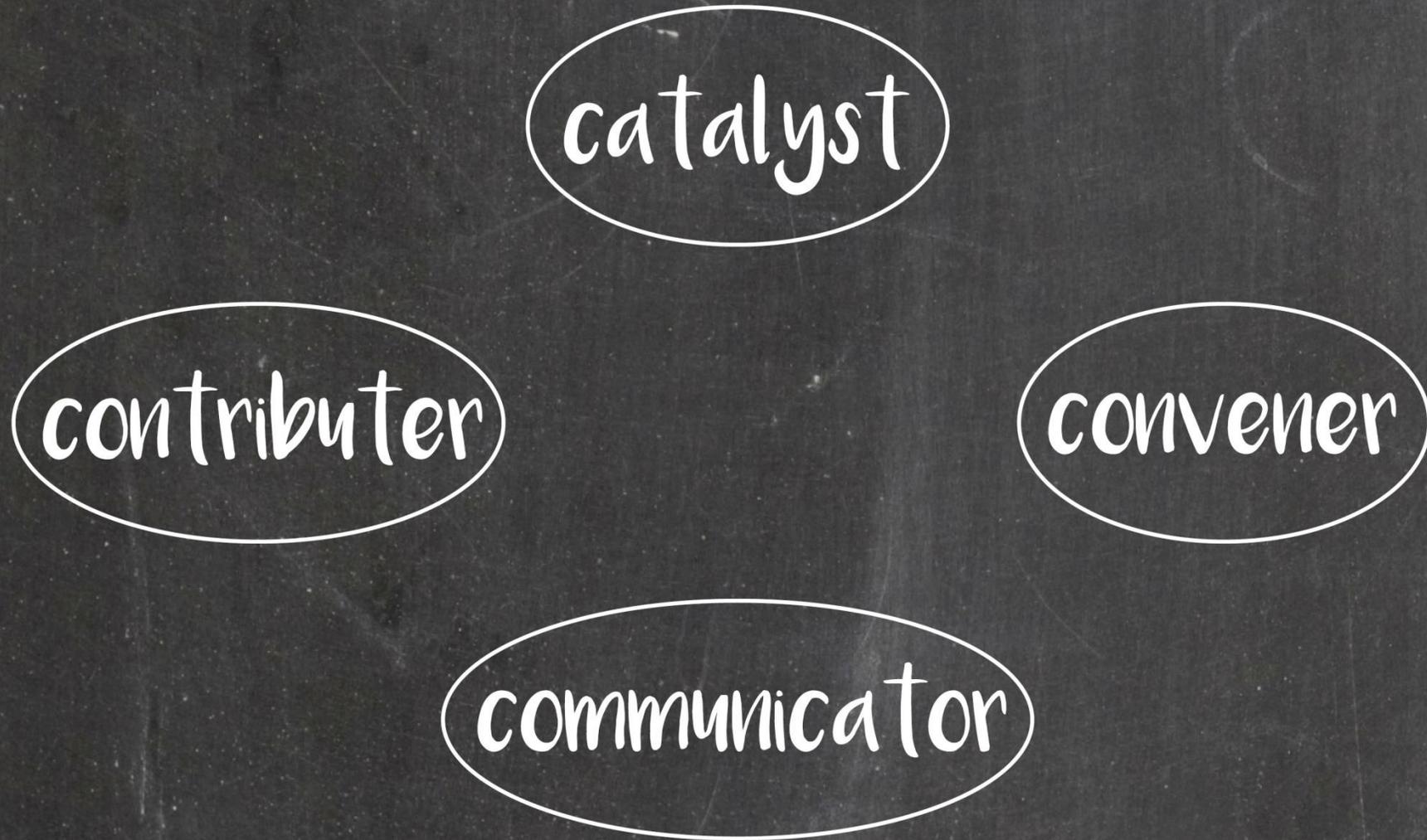
5. Opportunities: Goals & Roles



Community leadership opportunity filter



Four Roles



Catalyst

Create an Initiative

Advocate

Spark an idea

Convener

Start a conversation

Support a network

Respond to issues

Communicator

Research

Raise Awareness

Educate

Celebrate Success

Contributor

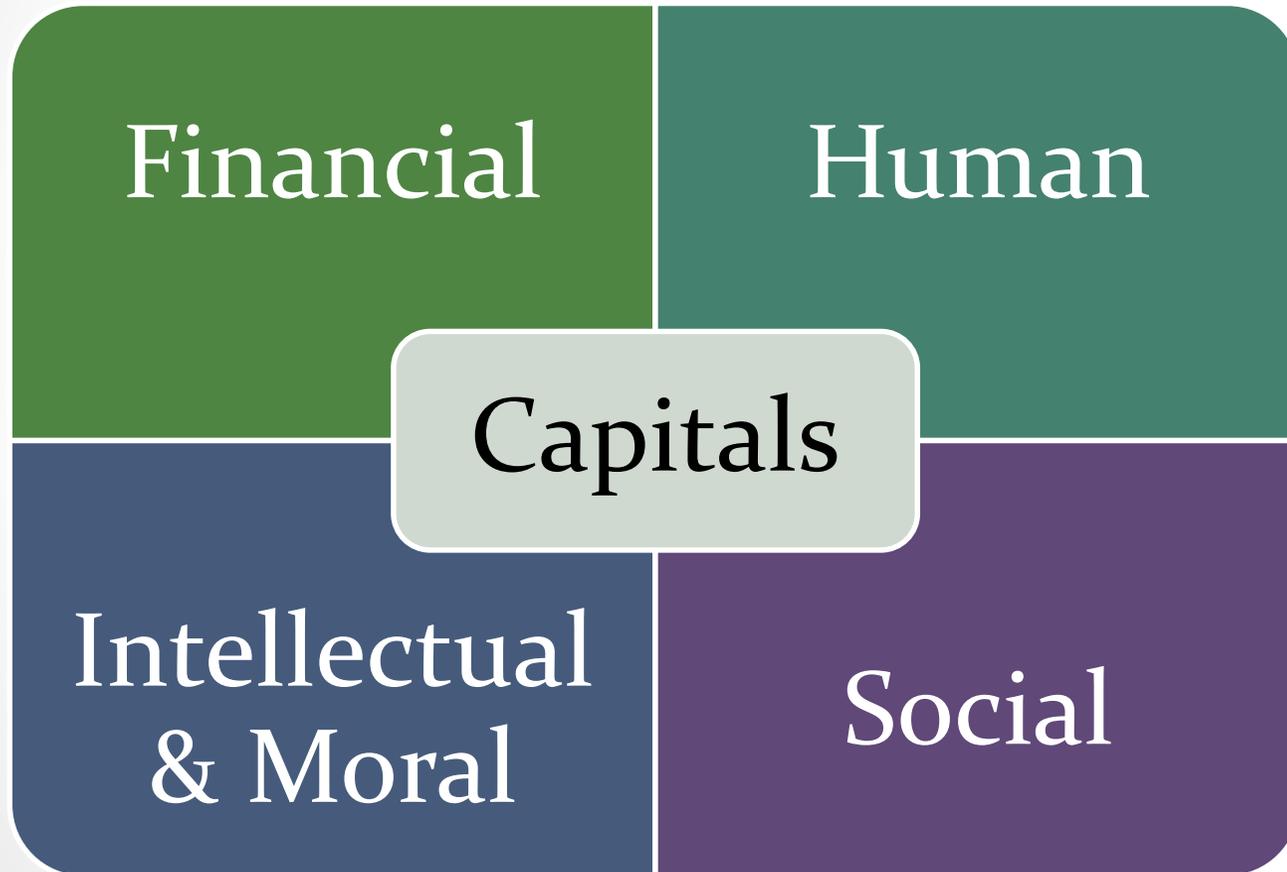
Money

In-Kind

Cache'

Roles of Others: Authentic Engagement

(donors, CF volunteers, professional advisors, etc.)



Which gifts?

Solicited when?

From and by whom?

Sparked and reinforced
by what messages and
feedback loops?

Goals and Progress Measures

What does success look like? What would make us run away?

1. For the community foundation
2. For partners (nonprofits, city gov., etc.)
3. For residents and places
4. For the larger system (policies, practices, collaboration...)

Budgeting

Sources

General operating budget

Gifts/grants to CF (often a project fund)

Operating or leadership endowment

Grant to self

Uses

Staff time

Contractors

Meeting/event space & costs

Research & evaluation

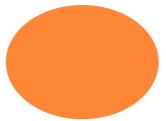
Communications

Grants



1. How did you set goals?
2. How did you define roles and capacity?
3. When and why are you inviting the gifts of others?
4. Lessons learned?

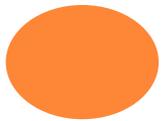
COLLECTIVE FUNDERS



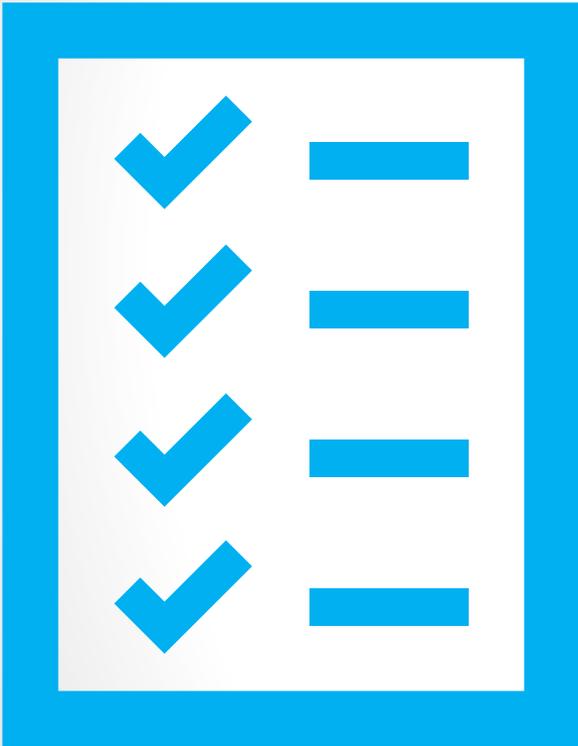
THE WHEEL: THE AUTHENTIC PROGRESSION



Thrivng Families
Thrivng Grant County



At Your Tables



Review your own leadership opportunity or work:

- What goals need clarified?
- What capacities and roles need clarified?
- How can you better engage donors, fund advisors, other resources?



Wrap-Up

Thank You!

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