

INSIGHT COMMUNITY FOUNDATIONS SERIES: LEARNING TO LEAD

MAKING CONNECTIONS TO ACHIEVE TANGIBLE RESULTS

Fresno Regional Foundation

As this community foundation learned to convene and connect local groups working on related issues, it also encountered the challenges of choosing right-sized projects that suit its mission, and sometimes saying “no.” Its story is drawn from the multiyear [Community Foundations Initiative II](#) of The James Irvine Foundation, an investment in a group of younger and smaller community foundations in California. Learn more at www.irvine.org/communityfoundations.



Initial leadership attempts taught the [Fresno Regional Foundation](#) not to take on too much too soon. According to former Board Chair Bill Lucido, “We tried to get the local hospitals together to discuss a critical issue — it didn’t work out, but we tried. There were four hospitals, and one wouldn’t even come to the table. I guess with the others, it became a problem of money, or willingness to work together. I think it would work now that the hospital leadership has changed.”

The Foundation also experienced early successes when it took on projects sized appropriately for its growth stage and capacity. For example, it helped a local police department in a financial bind. “We heard that the police department was going to lose their equine unit because they didn’t have enough money for the feed for the horses. It took just three phone calls, and we had the money so they could keep them,” says Lucido. “It was as simple as that.”

As the Foundation has grown into its role as a community leader, it has convened groups around several different issues, which has led to practical results for local nonprofits. One convening focusing on food distribution brought the food bank and several nonprofits together, revealing duplication of services.

Different people come to us now. We don’t have a ton of money. But we have the reputation as the place to go to if you have a problem to solve.

*Bill Lucido, former Board Chair,
Fresno Regional Foundation*

Lucido tells the story: “There were two organizations serving a little town in the foothills. One organization had a truck going in with perishables, and one had another truck that was coming out with donated clothes. Those two trucks were passing each other — one full, and the other empty... they could be using the same truck! Another nonprofit needed to rent cold storage, and the food bank had free cold storage available. We got all those people together, and it didn’t cost us anything but the board room and the time to coordinate.”

One of the Foundation’s most recent conversations raised some internal concerns. CEO Dan DeSantis recalls, “A local nonprofit was re-granting micro loans to small farmers. They wanted to borrow \$1 million. Our board was really struggling with it, and some of them felt it wasn’t the role of the Foundation. In terms of community leadership, the

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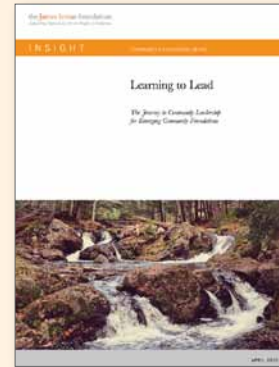
The Four Ps of Marketing
A Road Map to Greater Visibility for Community Foundations



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biggest challenge is to help the board recognize the position they are in, the power they have and how to use it wisely.” In this situation, a donor became involved and helped the board become comfortable with moving the idea forward.

The board continues to explore the idea of leveraging assets to play different leadership roles. “It’s that outside of the box community leadership stuff,” says Lucido. “I haven’t quite figured out how we should get involved in it.”

The Foundation’s growing reputation has yielded important benefits. “Different people come to us now,” says Lucido. “We don’t have a ton of money. But we have the reputation as the place to go to if you have a problem to solve.”

When we did our strategic plan, we said we needed to slow down, because we were going to overextend ourselves.

*Dan DeSantis, CEO
Fresno Regional Foundation*

Increasing visibility has made the Foundation more cautious about using limited time and resources wisely. “When I first came to the Foundation I would meet with anyone, anywhere, anytime,” says DeSantis. “I finally had to stop, because I was getting so many requests.” The Foundation is continually challenged to meet community needs without overextending capacity. “When we did our strategic plan, we said we needed to slow down, because we were going to overextend ourselves. We get approached all the time, and we have often had to say ‘no, we will not lead this group,’” he says.

DeSantis reflects on what’s next for the Fresno Regional Foundation: “We are now in a position to be a prominent community leader — we have the capacity. Now, it all comes down to the question of how we can creatively maximize our opportunity to benefit the Central Valley.”

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HELPING BOOST PHILANTHROPY AND NONPROFIT EFFECTIVENESS

Kern Community Foundation

Gaining deep experience in an issue area gave this community foundation the credibility and confidence to lead more broadly and invest in an online community knowledge resource. Its story is drawn from the multiyear [Community Foundations Initiative II](#) of The James Irvine Foundation, an investment in a group of younger and smaller community foundations in California. Learn more at www.irvine.org/communityfoundations.



[Kern Community Foundation](#)'s journey toward greater leadership began when it established the Women's and Girls' Fund and began serving as a knowledge center. Former Board Chair Judi McCarthy says, "We became more than just a fund. We as volunteers became knowledgeable about those issues, and it encouraged women to become philanthropists. We are more of a movement than a repository of checks." This work elevated visibility of the Women's and Girls' Fund, and also of the Community Foundation. "The exposure that we've given the Foundation has been quite good," says Mary Bynum, community volunteer and past Women's and Girls' Fund Chair. "We're county-wide, and we provide referrals to the Community Foundation."

With one success underway, the Community Foundation took its first step into building nonprofit capacity by re-granting funds provided by The James Irvine Foundation. "We held a convening, inviting everyone to come and talk to us about what the community's cultural needs were," says McCarthy. "As a second step, we worked to refine our knowledge of the needs through research, which we shared with the local arts council. The focus we ended up taking was capacity-building grants to help support the arts organizations."

After learning from this experience in building the capacity of arts organizations, Kern Community Foundation broadened its focus to help all local nonprofits increase their operating capacity and visibility with donors.

We wanted to focus in a smart way on driving local philanthropy while helping nonprofits improve their performance and build their sustainability.

*Jeff Pickering, President,
Kern Community Foundation*

"We wanted to focus in a smart way on driving local philanthropy, while helping nonprofits improve their performance and build their sustainability," says President Jeff Pickering. The Community Foundation has begun working toward this goal through its nonprofit outreach program. "It's our main community leadership platform. We have a community of 1,000 nonprofits, but most have less than six months' savings in the bank. The outreach program has been an ongoing effort to provide technical assistance, bringing in speakers, continuing to build the endowment platform and launching the nonprofit search engine," says Pickering.

Pam Fiorini, Executive Director of Golden Empire Gleaners, a local food bank with three staff members, says the Community Foundation is "really being a service to local nonprofits — they are doing training for executive directors, bringing all kinds of resources to those of us who have very limited budgets for training, and [they] have created an online platform that drives donors to us."

Kern Community Foundation employs GuideStar's DonorEdge technology to share information about nonprofits online. The Community Foundation offers

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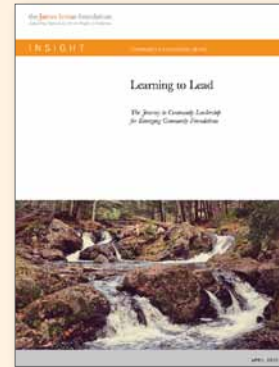
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incentives for Kern County nonprofits to create and publish their profiles, enabling potential donors to learn more about the work of these agencies. Creating an online profile is now a prerequisite for a nonprofit to qualify for many of the Community Foundation's grants.

"Within three years, we expect to have 300 local nonprofits on this site," says McCarthy. "If someone wants to see where the arts organizations are in Kern County, that's where they will go. If I as a donor want to make a difference, I can look at all these organizations and choose who I want to give to. These organizations can now market themselves to donors and other funders. It's also going to change the way we do grantmaking — less paper, less work, because so much information will be in each nonprofit's profile."

Participating nonprofits are already seeing results. "We've had three or four unsolicited donations come through the online platform already," says Fiorini, "though we've only been listed since March, and the Foundation has just begun marketing it! It will broaden our base, and as more people learn about it, I expect even more donations to come through it."

Initially, the Community Foundation board had trouble buying into the project. "The nonprofit search is expensive. The board was concerned about the cost," says McCarthy, referring to software and maintenance expenses. "So now we have a two-pronged approach — we secured some private

money, and then the website's maintenance is built into our operating money campaign. We look hard at what things cost, both in terms of money and staff time."

As the Community Foundation brings local nonprofits online, the data they generate together present myriad opportunities. "Right now, you can't say what the economic impact of the nonprofit sector is in our community, and we're working on the answer to that question," says Pickering. "Why do so many nonprofits do similar work but don't seem to be collaborating? These profiles give us very specific data points that we can use to start talking about the nonprofit sector."

In a parallel effort, the Community Foundation is working with current and potential donors to grow their giving knowledge. "We are starting a campaign around 'treat your charitable giving like an investment,' bringing resources to enable donors to be informed investors, and helping our nonprofits to become investable," says Pickering. "This is a chance to back up our role as the center of knowledge about the community."

The Community Foundation's leadership in strengthening local philanthropic participation by nonprofit organizations and donors alike has led to changes in how the Community Foundation is viewed externally, setting the stage for future endeavors. "It's been a paradigm shift," says Pickering. "We're not just a trusted philanthropic leader now — we are becoming *the* most knowledgeable philanthropic leader."

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RESPONDING TO RISING NEEDS

San Luis Obispo County Community Foundation

Facing a statewide budget crisis, this community foundation rose to the challenge by facilitating dialogue and mobilizing local organizations; in the process, it established a reputation for leadership and opened the door to additional opportunities. Its story is drawn from the multiyear [Community Foundations Initiative II](#) of The James Irvine Foundation, an investment in a group of younger and smaller community foundations in California. Learn more at www.irvine.org/communityfoundations.



[San Luis Obispo County Community Foundation](#) began considering community leadership in part as a means to differentiate itself from other nonprofit organizations in the region. Community Foundation leaders understood that their choices would have an impact on the organization's identity in the community.

"We were doing our strategic planning, and community leadership and the need to differentiate ourselves was on our minds. We had a lot of long discussions and did some needs research for our region, but we had a hard time committing to an issue area, because we didn't want to be seen as 'the poverty foundation' or 'the early childhood foundation,'" recalls CEO Barry VanderKelen.

The board was also concerned about using limited resources. VanderKelen says, "We need to live with the reality of our resources, and our marketplace. If we had enough assets, grantmaking and reputation, we could go more out on a limb — but I don't think we're quite there yet."

As the Community Foundation grappled with perceived barriers, external forces presented an opportunity to lead. "Worse than previous years, the state budget was delayed beyond my wildest imagination. We were becoming more aware of the likelihood that some version of structural change would be in our future. We were both (the United Way and Community Foundation) getting concerned calls from local agencies. So we started brainstorming together," says Rick London, CEO of United Way of San Luis Obispo County.

We're now seen as permanent and well-known in the community... With the state budget meltdown, it became obvious that we were the one who was being turned to for help. We're being viewed by the nonprofit community as a much more central, key organization.

*Wendy Brown, former Board Chair,
San Luis Obispo County Community Foundation*

Together, the Community Foundation and United Way, with help from the Nonprofit Support Center, convened the Collaboration Summit, an event that brought nonprofit leaders and volunteers together to begin talking about the burgeoning economic crisis.

Following the summit, working groups organized around specific issue areas, setting the stage for an ongoing dialogue among the nonprofits in the area. "The collaboration theme has continued to resonate," says former Community Foundation Board Chair Wendy Brown.

In addition to its impact on the participants, the Collaboration Summit established a strong and positive reputation for the Community Foundation within the nonprofit community. "We're now seen as permanent and well-known in the community," says Brown. "With the state budget meltdown, it became obvious that we were the one who was being turned to for help. We're being viewed by the nonprofit community as a much more central, key organization."

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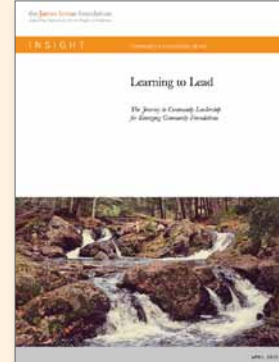
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With the success of the Collaboration Summit fresh in their minds, an external push from a donor helped staff and board jump into a more proactive community leadership role. In 2009, the Community Foundation received a \$1.7 million bequest from a donor, with the stipulation that it be used to impact homelessness in the region. Propelled in part by the convening experience it gained while working on the Collaboration Summit, the Community Foundation decided to take a collaborative, systems-oriented approach, rather than grant out the money piecemeal to various organizations.

“Part of the problem was that the organizations serving the homeless weren’t working together,” says VanderKelen. “We could perpetuate what was going on or effect systems change.” The Community Foundation initiated a project to determine the best course of action. “We had some listening sessions, and created safe space to talk about what needs to be done to alleviate homelessness, getting past ‘just give us the money, we know what to do,’” says VanderKelen. Coming out of the sessions, the Community Foundation hired a facilitator and brought together service providers, municipal leaders and homeless advocates to participate in a dialogue about how to create change. Over the course of six months, the group developed a comprehensive plan to bring many agencies together and create a “one-stop shop” for integrated homelessness services. Feasibility and financial studies are currently underway, and the group is searching for a site.

The Community Foundation received accolades for its role in pushing the work on the potential homeless service center forward: “There was a lot of positive feedback for the Foundation, because we got people to interact in ways they weren’t doing before. The core community leaders are now out there talking about what a wonderful thing the Foundation has done to support this work,” says VanderKelen. Increased visibility has other consequences. According to VanderKelen, “Now, people are bringing their ideas to us to help, but we don’t always have the resources to engage them.” The Community Foundation must now turn down some requests, taking care not to overextend its resources.

Leadership remains a primary strategy for increasing the Foundation’s visibility. “We really saw the power of word-of-mouth from our community leadership work. So now we’re seeing community leadership efforts as a way to build our relationships and reputation in parts of our region where we haven’t had much visibility in the past,” says VanderKelen.

After successfully convening the homelessness taskforce, the Community Foundation decided to focus on another high-need population, starting a program-related investment in affordable housing. “Now we have an opportunity to do something on our own about the biggest issue in our region,” says VanderKelen. “It’s our first independent statement, which now the board has become comfortable with. And after this one, I expect we’ll get more comfortable and take on even more.”