

INSIGHT COMMUNITY FOUNDATIONS SERIES: SIZING UP

STAFFING FOR COMMUNITY KNOWLEDGE AS A GROWTH DRIVER

Kern Community Foundation

This community foundation’s tiny staff includes a position devoted to nonprofit outreach and maintaining a nonprofit search engine for donors. 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.



Founded in 2000, [Kern Community Foundation](#) remains a very tight, lean organization. The Foundation has \$14.5 million in assets, and is staffed by three people who work the equivalent of 2.5 full-time employees.

In 2010, the organization recruited a new CEO with experience in the community foundation field, completing a multiyear transition process following the retirement of its founding chief executive. The CEO is responsible for all asset development (in partnership with the board), communications, strategic planning and board support.

Kern Community Foundation has distinguished itself through the creation of a director of nonprofit outreach position. The person in this role is not intended to act as a program officer. Instead, his job is to create connections with all nonprofit organizations in Kern County, and work with them to populate the Community Foundation’s website with nonprofit organizational profiles. This is a unique model, given that the Community Foundation has virtually no discretionary dollars and three very limited competitive grant programs.

With this staffing model, we are able to hold up to the community a very tangible value proposition. The community knowledge is not just in our heads; we are able to display what we know and can show it on the website... This investment has substantially increased our credibility as a knowledge resource.

*Jeff Pickering, President,
Kern Community Foundation*

Kern Community Foundation decided that its core competency would be demonstrating community knowledge. With no sizable dollars and therefore no dedicated program staff, the organization chose to “double down in investing in the technology needed to help a generalist position access, acquire, publish and review information about nonprofit organizations in our community,” says Jeff Pickering, Community Foundation President.

Not expected to be an expert in any one discipline, the director of nonprofit outreach is expected to gauge what constitutes a strong nonprofit and a good charitable investment. This core competency becomes a calling card with donors, positioning the Community Foundation as a donor’s best resource for understanding and having an impact on needs in the community. Approximately half the director of nonprofit outreach’s time is devoted to recruiting and orienting nonprofit organizations, and coaching them to post organizational profiles

**KERN COMMUNITY FOUNDATION
CURRENT STAFFING CONFIGURATION**
AN 11-YEAR-OLD ORGANIZATION WITH \$14.5 MILLION IN ASSETS

1.0	FTE	PRESIDENT AND CEO
1.0	FTE	DIRECTOR OF NONPROFIT OUTREACH
0.5	FTE	CONTROLLER AND FUND ADMINISTRATOR

2.5 FTES TOTAL

SIZING UP: STRATEGIES FOR STAFFING EMERGING COMMUNITY FOUNDATIONS

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Achieving Sustainability in Emerging Community Foundations



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



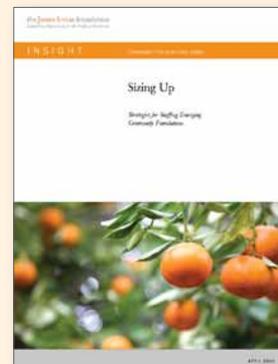
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on the website that provides a nonprofit search engine for donors. The remainder of his time is divided between managing three competitive grant processes and other programs, including an ongoing Nonprofit Excellence Workshop series.

The Community Foundation rounds out its lean staff with a long-serving half-time controller and fund administrator. With assets of \$14.5 million under management, this efficient allocation of human resources is possible because Kern Community Foundation outsources its back office and financial management functions to Greater Horizons, a subsidiary of the Greater Kansas City Community Foundation. The Greater Horizons arrangement enables Kern Community Foundation to limit its onsite finance activity to processing contributions, applying internal controls, monitoring accounts payable and budget, and staffing its audit and finance committees. The remainder of the controller and fund administrator's 0.5 FTE is devoted to fund administration, donor services, operations and systems oversight.

Pickering recognizes the limitations in Kern Community Foundation's spare staffing configuration. He cites the need for an additional staff person to assume responsibility for donor services. Pickering himself provides some donor services, as do both the controller and fund administrator and the director of nonprofit outreach. At this point, the organization can't justify the expense of further hiring without more asset growth.

In the meantime, Pickering is at peace with the non-traditional approach the Community Foundation has taken. "The real value proposition of the Community Foundation wasn't defined," he says. "Early donors bought into the concept of the Community Foundation on the basis of the stellar reputation of our founding CEO. But the organization didn't catch up in terms of its service platform to donors, or investing in technical assistance to help nonprofits raise more endowment. An organization can only be carried so far on one person's reputation.

"With this staffing model, we are able to hold up to the community a very tangible value proposition. The community knowledge is not just in our heads; we are able to display what we know and can show it on the website. There is tangible data that — perceived or otherwise — boosts our value. We can take every nonprofit organization after-school program in a ZIP code and see how they are doing compared to one another. It has substantially increased our credibility as a knowledge resource. We have wowed the donors."

INSIGHT COMMUNITY FOUNDATIONS SERIES: SIZING UP

SLOW GROWTH IN A RESOURCE-CONSTRAINED ENVIRONMENT

The Community Foundation of Mendocino County

By awaiting future asset growth, this community foundation staffed sparsely with mostly part-time employees playing multiple roles supplemented by outside contractors. 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.



Mendocino is located in an isolated community on California’s northern coast, with a population of 89,000 spread over 3,500 square miles of windswept forest and coastal roads. Incomes are low on a per capita basis; the economy and industry have been in steady decline for decades. Founded in 1993, and with \$12 million in assets, [The Community Foundation of Mendocino County](#) is the largest funder in the region.

Outsourcing for financial expertise has been great for us.

*Susanne Norgard, Executive Director,
The Community Foundation of Mendocino County*

The Community Foundation’s staffing model has been very consistent for a long time, with one full-time executive director and two part-timers. Given the size and population distribution of its territory, Community Foundation staff move between two small offices. Additionally, an external accountant provides financial management for eight hours monthly, and a student intern helps as needed for special projects and record retention.

This organization also contracts for external marketing support and communications, including its newsletter. “Outsourcing for financial expertise has been great for us,” says Executive Director Susanne Norgard. “Our accountant handles our complex fund accounting. There would be no sense in our incurring the cost for a half-time CFO. We can’t afford one and don’t need one.”

THE COMMUNITY FOUNDATION OF MENDOCINO COUNTY CURRENT STAFFING CONFIGURATION		
AN 18-YEAR-OLD ORGANIZATION WITH \$12 MILLION IN ASSETS		
1.0	FTE	EXECUTIVE DIRECTOR
0.5–0.6	FTE	DIRECTOR OF GRANTS AND PROGRAMS
0.8	FTE	OFFICE COORDINATOR
2.3–2.4 FTES		TOTAL

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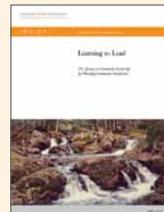
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While Norgard would like to see more full-time positions and the efficiencies that come with having all staff onsite on a daily basis, this is not something the fiscally conservative organization feels it can afford. Norgard emphasizes asset development as a higher priority, but describes the organization as lacking the resources to hire someone devoted to this work. Norgard's is the sole full-time position, and she is acutely aware that she cannot do everything needed to grow the organization.

Out of necessity, the Community Foundation has grafted some hybrid responsibilities onto its handful of permanent positions. The office manager is thoroughly cross-trained to all other functions, and also has staff responsibility for social media activity. The director of grants and programs has a hand in most other aspects of the organization's marketing.

Anticipating slow but steady growth, Norgard plans to expand the team over time. The Community Foundation will stay the course until the organization's assets reach a point where she and the board feel they can completely justify the increased costs of more full-time staff.

INSIGHT COMMUNITY FOUNDATIONS SERIES: SIZING UP

FLEXIBILITY IN THE FACE OF UNWANTED CHANGE AND UNEXPECTED OPPORTUNITY

San Luis Obispo County Community Foundation

By reconsidering notions embedded in its strategic plan and opening the door to a part-time employment model, this community foundation gained access to high-caliber staff and new ways of working. 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.



The [San Luis Obispo County Community Foundation](#), on California's Central Coast, was founded in 1998 with a full-time executive director and a 0.25 full-time equivalent (FTE) assistant. Assets grew to \$26 million by 2006, and today sit at \$30 million. From its inception, this organization adopted an approach of modestly staffing across all the typical functional areas of a community foundation. In 1999, it added a full-time administrative assistant, who also provided limited finance support. A 0.625 FTE director of grants and programs was introduced to the staff in 2000 (the position has since been expanded to 0.8 FTE), followed by a finance manager in 2003. In 2007, a new strategic plan was adopted, and a new executive director succeeded the founding CEO. Today the Community Foundation has seven staff in 4.8 FTEs.

In the last several years, the staffing model has been influenced on one hand by unwelcome economic pressures, and on the other by unforeseen opportunities. The lesson in the face of both elements is that success lies in maintaining flexibility.

When a new strategic plan was adopted in July 2007, the board expected to create a full-time marketing position by July 2010. By that time, however, the stock market had melted down, and the Community Foundation had tightened its operational belt in every way it could. Nineteen percent of the operating budget was cut. Layoffs were avoided, but there were deep salary cuts and extensive austerity measures were taken. The Community Foundation adopted a mission-first position, above all honoring the commitment it had made to donors whose gifted assets would last forever. With this stance,

SAN LUIS OBISPO COUNTY COMMUNITY FOUNDATION CURRENT STAFFING CONFIGURATION 13-YEAR-OLD ORGANIZATION WITH \$30 MILLION IN ASSETS

1.0	FTE	EXECUTIVE DIRECTOR
1.0	FTE	OFFICE MANAGER
0.8	FTE	GRANTS AND PROGRAMS DIRECTOR
0.5	FTE	DONOR SERVICES ASSOCIATE
0.5	FTE	DIRECTOR OF FINANCE
0.5	FTE	SCHOLARSHIPS ASSOCIATE
0.5	FTE	FINANCIAL ASSISTANT

4.8 FTEs TOTAL

it preserved assets at the expense of personnel. While the goals contained in the 2007 plan remained the same, the organization needed to rethink its approach to many of its strategies. Even as the market began to correct and assets approached previous levels, the Community Foundation felt it could neither afford nor justify a full-time marketing position.

The Community Foundation absorbed a part-time position funded through a third-party grant that was completed, and over time allocated this position to scholarship support. The 2007 strategic plan actually intended to de-emphasize scholarships: It would support them if approached but would no longer promote them to donors. During the downturn, however, the Community Foundation experienced a significant

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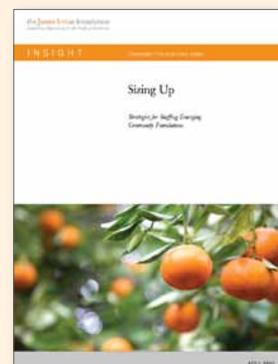
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upswing in the creation of new scholarship funds, and has become well known and regarded in the community for scholarships. By better staffing scholarships as a visible vehicle for philanthropy, the Community Foundation was able to meet its planned goal of increasing marketing and visibility.

At the same time, this shift closely supported donors' self-identified interests and demonstrated community impact at a time of great need. The Community Foundation concluded that the addition of a grants and programs position yielded multiple benefits. According to Executive Director Barry VanderKelen, it was “all about communicating the impact of our giving and grants to get donors excited to do more than before.”

Apart from economic reversals, welcome unexpected opportunities also shaped the Community Foundation's staffing model. And the organization flexed to respond. When the long-serving full-time finance manager retired in 2011, the Community Foundation began searching with trepidation for a new full-time replacement, believing it would be difficult to fill the position. Instead, it received a flood of resumes — but most candidates' expectations for higher compensation and lighter workload exceeded what the organization could promise. When the most highly qualified candidate made clear her preference for part-time work and indicated that she had a colleague with similar interest in part-time work as a finance assistant, the Community Foundation adjusted its expectations to seize this unplanned opportunity.

In attempting to fill one critical vacancy, the organization was able to attract two talented people who have proven to be exceedingly valuable over time. “We could have never

afforded to hire these individuals if they had to work full time,” says VanderKelen. “It was a whole series of positive outcomes — and they were all unintentional. We only found those people because we were flexible.”

We could have never afforded to hire these individuals if they had to work full time... We only found those people because we were flexible.

*Barry VanderKelen, Executive Director,
San Luis Obispo County Community Foundation*

Over time, this flexibility in thinking beyond traditional full-time positions allowed the Community Foundation to “overbuy on talent,” says VanderKelen. Doing so “made talent available to us that otherwise would not have been if we'd gone with a strict 40-hour week requirement. It's allowed us to leverage up.”

The part-time approach embraced by San Luis Obispo County Community Foundation has its downsides. With a staff that is entirely part time other than the executive director and office manager, work schedules are inconsistent. Delays and a certain amount of inefficiency are inevitable. Burnout is a constant concern. And having the executive director as the only staff member “dedicated” to asset development limits the Community Foundation's rate of growth. Staff and board understand that the organization needs a full-time position dedicated to asset development, and this position is the next priority in the staffing plan.

INSIGHT COMMUNITY FOUNDATIONS SERIES: SIZING UP

A CONSERVATIVE AND COLLABORATIVE APPROACH TO STAFFING

Shasta Regional Community Foundation

This community foundation staffed across all traditional functional areas at low cost through hybrid positions and cross-training. 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.



Located at the northernmost edge of California, the [Shasta Regional Community Foundation](#) serves an isolated population of 220,000 scattered over two rural counties and more than 10,000 square miles. The organization evolved to become a community foundation in 2000 from its roots as a nonprofit management support organization. For several years it operated in a dual capacity, eventually spinning off the nonprofit services center in 2007. By 2010, Shasta Regional Community Foundation had grown to more than \$10 million in total assets and had 4.3 FTEs.

We are all cross-trained. Filling in for one another is never a problem.

*Kerry Caranci, former Interim Executive Director,
Shasta Regional Community Foundation*

Shasta Regional Community Foundation has been notably conservative in restraining staff growth and operating costs. The staffing model has remained relatively fixed over the organization's life as a community foundation. The approach has been to allocate positions across most of the functional areas typically staffed by a community foundation.

Shasta Regional Community Foundation's CEO is responsible for asset development, fundraising, human resources and board relations. A director of community programs is responsible for grantmaking (primarily regranteeing dollars contributed by a local private foundation) in five counties, monitoring fiscal sponsorships and assuring knowledge of community needs. These staff members are aided by an administrative assistant who provides some program support and a part-time independent consultant who functions as CFO.

**SHASTA REGIONAL COMMUNITY FOUNDATION
CURRENT STAFFING CONFIGURATION**
AN 11-YEAR-OLD ORGANIZATION WITH \$10 MILLION IN ASSETS

1.0	FTE	CEO
1.0	FTE	SENIOR PROGRAM AND OPERATIONS OFFICER
0.8	FTE	DIRECTOR OF COMMUNITY PROGRAMS
1.0	FTE	ADMINISTRATIVE ASSISTANT
0.5	FTE	INDEPENDENT CONSULTANT/CONTRACT CFO

4.3 FTES TOTAL

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Recently, the Community Foundation created a senior program and operations officer position responsible for day-to-day operations, grantmaking, a loan program, scholarships and marketing.

Over time, configurations of some positions and their FTE allocations have fluctuated. At one point the Community Foundation’s now-contract chief financial officer was a full-time employee. And previously, the organization created a single hybrid position — part program, part marketing — to meet multiple needs. Staffing a front-desk function became a challenge, and ultimately the Community Foundation had to invest in a full-time position with benefits to provide consistency and attract someone with the competence to fill this need.

Cross-training among staff is a hallmark of success in Shasta. Asked what works well, former Interim Executive Director Kerry Caranci commented, “We all know what needs to be done, and we all know how to do each others’ jobs if necessary. We are all cross-trained. Filling in for one another is never a problem.”