



Pilot Program Staffing Support Grant/Funds

In November of 2007, the Iowa Council of Foundations (ICoF) and the Community Vitality Center (CVC) supported the Community Foundation of Northeast Iowa through funding to provide direct staffing support to grow local community foundation affiliate organizations through various efforts such as building endowment funds, networking with professional advisors and promoting the importance of charitable opportunities in regard to the transfer of wealth information in Iowa. We have heard from all pilot projects about various successes and it is now time to collect a more formal report on the work that was conducted for your specific project, in part, due to the support from the ICoF and CVC.

The Iowa Council of Foundations and the Community Vitality Center request the following information, to be submitted via hard copy and email, *no later than April 15, 2009 (see submission information at the end of this document)*. Such reporting, unless otherwise specified by your organization in writing, will also *indicate your desire to extend the pilot project program for one additional year*. Upon review and any necessary follow-up by the ICoF and CVC, your community foundation will receive notification as to potential funding for an additional year.

Organizational Information:

Community Foundation Affiliates Engaged in the Pilot Program Staffing

Grant/Funds:

- ✓ Fayette County Community Foundation
- ✓ Floyd County Community Foundation
- ✓ Bremer County Community Foundation

Host Community Foundation: Community Foundation of Northeast Iowa

Host Community Foundation Main Contact: Mary Ann Burk, President & CEO or Mindy Gress, Director of Outreach

Email: mburk@cfneia.org or mgress@cfneia.org Phone Number: 319-287-9106

Street Address: 425 Cedar Street, Suite 310 City, St, Zip: Waterloo, IA 50704

Individual Serving as Pilot Program Staff as a Result of Funding:

Jeff Leschensky, M.A. Principal Consultant

Email: jleschen@crg-net.org Phone Number: 563-382-1829

Briefly describe the structure of this arrangement (consultant, contractor, employee, etc.): Jeff is a Principal Consultant for the Community Renaissance Group.

Provide the time commitment put forth by this individual to work on the Pilot Program Staffing Grant/Funds (i.e. 34 hours/week, 20 hours/month): 8-10 hours per month for 12 consecutive months to each participating foundation which includes monthly visits, meeting preparation time and ongoing communication between county visits.

Signatures

Date

Date

Pilot Program Staffing Support Grant/Funds Support Letter

Principal Consultant: Jeff Leschensky

Job Description: The Community Foundation of Northeast Iowa received a grant to do a pilot project to provide focused assistance to each of three affiliate community foundations. The three foundations chosen to participate include Floyd, Bremer and Fayette counties.

Mr. Leschensky is providing 8-10 hours per month for 12 consecutive months to each participating foundation which includes monthly visits, meeting preparation time and ongoing communication between county visits.

Facilitator Goals Include:

1. Educate local affiliate committees about endowment building and opportunities for giving.
2. Assist local affiliate committees develop/implement a communications plan in their county.

Facilitator Services Include:

1. Education and training regarding endowment building, philanthropy and organizational development.
2. Facilitate the development of a Communication plan
3. Aid Committee members in developing action steps towards the implementation of the Communications plan.
4. Meet with members of the local financial planning community, donor prospects and other community leaders as needed.

Successes & Challenges:

Host foundation: The work of Mr. Leschensky was educational and beneficial for affiliate governing committees overall understanding of a community foundation, its operation, and the development of individual skills to share endowment knowledge, speak credibly and foster asset growth in their counties.

Mr. Leschensky was faced with typical challenges of committee member participation and commitment very early in the Pilot Program. He addressed these challenges by identifying leaders within each governing committee to aid in fostering participation, and utilized an ad hoc committee model to keep the planning process moving forward.

For two of the three affiliate foundations (Floyd and Bremer Counties), a task force group of four to ten members was formed to complete the Communications plan.

While not ideal for creating plan ownership by the entire governing committee it did allow for completing the plan in a timely manner.

The Pilot program was intended to be completed by entire governing committee. This happened in only 1 county (Fayette). In the other two counties work ended up being done by sub-committee (Floyd) or task force (Bremer). Of particular note, the Bremer County Task Force was very focused, and dispensed with the work of developing a communications plan in a very short time period (November - February) after a summer of flooding hindered their start.

Planning Steps

- Identify stakeholders
- Identify stakeholder needs and wants
- Vision Statement development
- Mission review (edits or creation)
- Framing questions (buy-in; obstacles; action; and solutions)
- Core Message Development
- Supporting Message Development
- Communication plan
- Action plans
- Evaluation

Pilot Program Evaluation: Notes from Consultant

Observation 1: Each community needs a volunteer "champion/leader," someone who will encourage, delegate, and facilitate action in between meetings. Of the three affiliate foundations involved in this first pilot program, only one (Bremer County) had a volunteer who took on this role. Results with the other two community foundations were mixed. One (Floyd) has a *pseudo* staff person that the committee leans heavily on to be the embodiment of the community foundation.

Recommendation: Going forward, we need to identify one (non-staff) person to be the local contact/leader in the process. We might consider a work plan for each affiliate that lays out their responsibilities to CFNEIA and the consultant.

Observation 2: The formal education component of our work was only partially realized. We did complete two sessions that focused specifically on philanthropy and endowments. Other sessions on governance, and fund raising were not covered as our work on the communications plan took precedence.

Recommendation: Consider offering a series of webinars on governance and fund raising topics.

Observation 3: The use of Basecamp (internet management system) as a project management center was partially successful. Only Bremer County fully utilized this web application for communicating about meetings, discussing the planning process, and storing files. Committee Members from the other two community foundation affiliates would utilize Basecamp when we requested they do so to review a document, brainstorm, et cetera.

Recommendation: At a minimum, each affiliate foundation needs a group calendar, place for file storage, and (to a lesser degree) online discussion. At this time, Basecamp does this very well.

Observation 4: Attendance at monthly meetings varied greatly. In several cases we had to reschedule the meetings due to lack of participants. For one affiliate, the pilot program was incorporated into their regular monthly committee meeting and attendance was not a problem.

Recommendation: Consider incorporating the pilot program into a regularly scheduled governing committee meeting.

Observation 5: Community foundation identity for 2 of the 3 affiliate committees is strongly tied to the Iowa Gambling Revenue. Hopefully, with the development of the communications plan and its core messages, committee members will recognize the broader mission of the community foundation.

Recommendation: Continue to educate affiliate committees on community foundation history, options for giving, and local examples of endowment gifts as they are established.

Goals for Potential Year Two:

Scope:

- Continue work with Year I Pilot Program Counties (Bremer, Fayette, and Floyd)
- Work with up to 2 additional county affiliate foundations on communications plan

Proposed Work

Year I — Returning Affiliates (went through pilot program 2008/2009)

- Assist local governing bodies with the implementation of their completed communications plan
- Organizational Development (could include abbreviated strategic planning process; and committee development (recruitment, retention, etc.)
- Fund Raising Strategy and Counsel. Identify strategies for building local endowment funds (the idea we discussed was the development of field of interest funds). Solicitation training; and Stewardship planning

Year II - New Affiliates

- Develop Communications Plan (Committee Retreat for Stakeholder Identification/Needs, Vision and Mission Statement. Environmental scan) Monthly meetings after that to identify core messages, and develop plan - first six months)
- Assist new affiliates in implementing plan (second six months)

Pilot Program Staffing Support Grant/Funds

Evaluative Questions

- **Specific goals put in place relating to outreach and permanent endowment building through asset development.**

Goals Include:

1. *Educate local affiliate committees about endowment building and opportunities for giving.*

The purpose of educating committee members about the power of endowment building and the opportunities for giving was important to bring motivation and understanding about how a community foundation can work with many donors/agencies to meet individual and community philanthropic goals to the committee. Before they could educate others, the need to have a full understanding of how the community foundation could help others help their community.

2. *Assist local affiliate committees develop/implement a communications plan in their county.*

Through education and work with a skilled consultant, the local committees developed a communications plan, complete with action steps, to educate their communities about the power of their Community Foundation. It is through community education that knowledge, understanding, and trust in local community foundations will be formed, directly affecting fund development and asset growth.

The Communication plans include strategies and tactics to:

- a) educate donors, professional advisors, agencies and the general public through speaking engagements about their local community foundations
- b) identify, cultivate, and thank donors
- c) educate potential donors through media outreach strategies
- d) sponsor local events to be seen as a partner in fostering community vitality and spreading the word about the community foundation.

- **Details of Fund Usage**

Pilot Program Staffing Grant/Funds from the Iowa Council of Foundations and the Community Vitality Center were used to contract with a consultant to do work with three affiliate community foundations to develop a communications plan and provide a nonprofit education opportunity. Work consisted of 90 minute monthly meetings with local governing committees as well as internet based project management (Basecamp), utilized for communication/work between meetings.

The Community Foundation of Northeast Iowa provided funds to cover other administrative overhead such as mileage reimbursement for consultant, support staff, printing/creation of educational materials etc.

- **Endowment Building and Asset Development**

Growth in assets/Monitoring processes/Accomplishments: We live in a world of competing choices, a world of changing opportunities. Each individual has his or her own set of particular needs and philanthropic goals. No single solution is right for

everyone. By beginning to educate and develop relationships within their communities, community foundations are speaking with and identifying potential donors. It is difficult to chart the asset growth of a community foundation in a year period as community foundations rely heavily on estate and planned gifts that could take years to be realized.

It will be through each community foundations set strategies (listed above) and tactics that asset size will begin to increase. The measure of these strategies will be set according to number of presentations given, new funds being established, by tracking referrals and looking at visibility in each community.

Over a twelve month period it is obvious that the work each affiliate Community Foundations was putting into the development of a communications plan was creating a sense of ownership.

As of April 2009, each affiliate Community Foundation has a completed Communications Plan containing specific action steps to assist in reaching identified goals. The three affiliate Community Foundations are equipped to educate donors and nonprofit organizations about issues affecting their communities and offer support for their charitable goals.

Describe growth in assets of the community foundations involved in the Pilot Project Program see during the pilot Project Program's year.

Bremer County Community Foundation:

Total Contributions to the Foundation from April 2008-April 2009: \$196,917.21 (total assets to date= \$910,483.03; total donations since inception= \$1,367,918.85).

Total number of gifts- April 2008-April 2009: 20 (total to date: 102)

New Fund Established April 2008-April 2009: 1

Agency Fund – Cedar Valley Friends of the Family Endowment Fund

Cedar Valley Friends of the Family provides free and confidential services for persons affected by domestic violence and sexual assault. Income from the fund will be used to support the charitable activities of Cedar Valley Friends of the Family.

Linda Miller, Executive Director for Cedar Valley Friends of the Family

Fayette County Community Foundation:

Total Contributions to the Foundation from April 2008-April 2009: \$258,952.97 (total assets to date= \$158,869.39; total donations since inception= \$545,868.48)

Total number of gifts- April 2008-April 2009: 19 (total to date: 124)

New Fund Established- April 2008-April 2009: 1

Field of Interest Fund – Mark and Denise Nelson Family Fund

This fund was established by the Mark and Denise Nelson Family to support the charitable activities of the Valley Community School District and for special projects not normally funded by tax dollars. Grants will be used for the benefit of all students of all capabilities (e.g. including special education/special needs students) and will be limited to academic programs. The grants will not be used for computer hardware or school field trips.

The exciting part of the establishment of this fund was that it was a gift of soybeans! This is a great story to share in a rural community showcasing the diverse and creative ways someone can give back to the community that has so often provided for them!

In regards to planned giving, Mr. and Mrs. Nelson expressed great interest in continuing to give to their fund through the years.

Floyd County Community Foundation:

Asset growth from April 2008-April 2009: \$171,915.21 (total assets to date: \$203,723.23; total donations since inception= \$502,830.33)

Total number of gifts - April 2008-April 2009: 21 (total to date: 52)

New Funds Established- April 2008-April 2009: 2

Designated Fund – Bucklen Family Fund

This fund was established by the Bucklen Family to support the Rudd-Rockford-Marble Rock Community School District by giving out scholarships; to support and benefit the citizens of Marble Rock, Iowa through community betterment grants; and to support the charitable activities of Marble Rock United Methodist Church.

In regards to planned giving, Mr. Bucklen expressed great interest in continuing to give through the years and contributing a larger gift through his estate planning.

Expendable Fund – Floods of 2008 Sub Fund

This fund was established to provide for on-going, long-term recovery, clean up and support of the communities affected by the floods of 2008 in Floyd County. The Community Foundation will partner with existing non-profit and governmental agencies within the areas affected to provide funding for the services these agencies are delivering to meet the needs of the victims of the floods.

Describe asset development by way of planned gifts or other expected contributions to the Community Foundations involved.

As of April 2009, each affiliate Community Foundation has a completed Communications Plan (main focus for the Pilot Project) containing specific action steps to assist in reaching identified goals. The three affiliate Community Foundations are equipped to educate donors and nonprofit organizations about issues affecting their communities and offer support for their charitable goals.

Each participating foundation identified specific strategies, tactics and tools to communicate the core messages of their Community Foundation to the key stakeholders identified within their communities. All strategies in some form set the goal of asset development through both planned and outright gifts.

One of these strategies is conferencing with donors and providing them with all the giving options a Community Foundation can accommodate, including planned giving and the chance to be part of the Community Foundation Legacy Society. In all agreements for individual and family donors, there is an option allowing the donor

to become part of the Legacy Society. By checking this option, they are expressing their intent to give through their estate or will and at the same time, assisting the foundations in keeping record of planned gifts that may be coming in the years to come. Within the past year, there are two donors that have utilized this option.

Provide additional comments as to accomplishments in the area or asset development for the Community Foundations involved in the Pilot Project Program.

As of April 2009, each affiliate Community Foundation has a completed Communications Plan containing specific action steps to assist in reaching identified goals. The three affiliate Community Foundations are equipped to educate donors and nonprofit organizations about issues affecting their communities and offer support for their charitable goals. (See attached strategies and action plans for each county.)

➤ **Implications of increased staff capacity**

Lessons learned: Please see observations under Successes/Challenges above.

Success Story:

Each of our three affiliates participating in this pilot project had the chance to develop their own plans, their own strategies and their own goals of how to build assets for their Community Foundations. For the most part they were similar goals and action steps but Bremer County in particular, has identified a unique goal to ensure everyone in the county is given the chance to be involved! By establishing a community fund in each community within Bremer County it is the hope of Chairman, Al Charlson and other committee members that each community is represented and has advocates that will assist in promoting philanthropy in their communities to enhance the quality of life in Bremer County and to encourage and grow endowment for the support of charitable causes now and in the future.

Before this pilot project was started there were three community funds established in Bremer County including Frederika Community Fund, Waverly Community Fund and Readlyn Community Fund. No other funds have yet been established, but the Bremer County Community Foundation committee has been working to put this plan into action by meeting with many community representatives and hope to soon have a community-based fund in every community in Bremer County.

Success Story:

Bill Bucklen's family has lived in Marble Rock for generations. He maintains his connection to the community through periodic visits to oversee operations on his family farms and stay in contact with friends, relatives, and associates. On one of his visits he heard from committee member and friend Susan Nelson about the community foundation as a way to contribute to the area in an organized, structured way. He found Endow Iowa to be a particularly attractive element of the program, as a way to leverage his contributions to benefit the region. Susan put him in touch with CFNEIA's Mary Ann Burk, who worked with him to establish a family fund for the support of students and organizations in Marble Rock.

Success Story: The major success is that each of these community foundations formulated plans to increase endowment assets to benefit their communities forever. Three audience specific PowerPoint presentations have been developed for each of the counties to speak knowledgeably to individuals, agencies and professional advisors. The power points include the transfer of wealth information specific to each county, information about the power of endowment, ways to give, the many types of funds donors may create, and how community foundations partner with professional advisors and work to meet individual donor's charitable goals. Events are being planned to increase visibility of the community foundation in each community. Finally, strategies are being formed to stay connected to the donors who have already been so generous.

Helping you help your community...is the overriding focus of every community foundation and the main focus of the communication plans that have been developed in each county. We hope to build awareness and ultimately an understanding of the value of donating or leaving a planned gift through a will or estate to benefit the many charitable needs and opportunities of each county.