

Community Leadership: Best Practices for Brazos Valley

Report for the Brazos Community Foundation

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Executive Summary
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This report was prepared as part of a graduate student capstone project at the George Bush School of Government and Public Service for our client, the Brazos Community Foundation (BCF). We believe the report has implications for the BCF and the broader nonprofit community in the Brazos Valley.

The project team identified ten potential community leadership roles based on best practices in the field and interests of the BCF. Students conducted interviews with 25 local nonprofit leaders, Texas A&M University representatives, as well as other community foundations to inform our recommendations.

After careful evaluation of data the group identified five community leadership roles with the most potential for implementation by the Brazos Community Foundation and the Brazos Valley at large. These roles received wide support, were feasible - based on available resources, and aligned with the mission and purpose of BCF. Students developed a series of action steps to provide guidance for the implementation of these roles. Through the interviews students discovered many opportunities for partnerships in implementing roles:

1. Nurture New Philanthropists
 - Bring together philanthropists
 - Education, cooperation, and mentoring of current and potential philanthropists
 - Matching donor interests with community needs
 - Find ways to keep money in the Brazos Valley
2. Nonprofit Excellence Awards
 - Create a Nonprofit Management Award
 - This award can be given at a Nonprofit Forum
 - Create a collaborative selection and review panel
3. Workshops and Trainings
 - Past Capstone nonprofit forums and workshops can be a basis for the future
 - Coordinate work with others
 - Provide opportunities for local trainings and workshops
4. Connect to University Resources
 - Further develop partnership with Bush School, Aggie Serve, etc.
 - Foster the creation networks between community and university entities
5. Nonprofit Resource Center
 - Participate in efforts to organize and develop a nonprofit resource center

The implementation of these action steps can help strengthen the capacity of regional nonprofits and improve the visibility of the Brazos Community Foundation.

Introduction

The Brazos Community Foundation (BCF) wishes to be seen as a leader in the local nonprofit community, as well as a primary point of contact for local nonprofit organizations to fulfill their needs as service providers. The BCF also wishes to create and foster valuable partnerships among other nonprofit leaders in order to ensure that services are delivered where they are needed most, without a surplus of effort or duplication. Throughout the 2007-08 academic year, the Bush School BCF Capstone engaged in research, analysis, and marketing activities with the BCF to help build its position as a leader in the community. As citizens, nonprofits, local government, and corporations become more aware of the BCF's ability to act as an arbiter of philanthropy in the Brazos Valley community, a connectivity will follow that will strengthen community ties and attract additional resources. The project had four goals.

Goal 1: Identify potential community leadership roles for the BCF

Capstone members investigated current literature to uncover community leadership methods for established community foundations and proven methods for management success and best-practices in nonprofit organizations. The Capstone Team met with Tiffani McKinney, Executive Director of BCF, to help identify possible opportunities and current interests of the BCF for additional Community Leadership roles.

Goal 2: Prioritize potential community leadership roles for the Foundation

Capstone members conducted 25 interviews with local nonprofit and community leaders to explore the current state of the nonprofit sector of the Brazos Valley, the needs of local nonprofit organizations such as capacity building, training, and mediation, and possible methods for collaboration and other successful nonprofit practices. Once complete, Capstone members analyzed the interviews to uncover common themes, the current position of the local nonprofit sector, and the perspectives of its leaders. These roles were prioritized based upon interest in the community and feasibility for the BCF.

Goal 3: Support the Foundation's ability to implement one or more of the community leadership roles

The Capstone identified potential partnership opportunities for the BCF with other local nonprofits for the implementation of selected community leadership roles based on information gathered during the interview process. In addition the students interviewed six Texas A&M representatives and academic experts to establish methods for implementing selected community leadership roles. Further research was conducted with Texas community foundations to explore funding and implementation examples.

Goal 4: Increase community awareness of the Foundation

Fall Nonprofit Workshop: The Bush School, United Way, and BCF sponsored an all-day workshop in October that focused on the Standards of Excellence for Nonprofits and the National Nonprofit Congress. The presenters were Rose Mary Fry of the Texas Nonprofit Network and Dr. Angela Bies of the Bush School.

Spring Nonprofit Forum: The Capstone coordinated a spring nonprofit forum in April to provide training and to bring awareness of the BCF to the local nonprofit community. The forum included five workshop sessions, a lunch, a keynote speaker, and a panel session with the Capstone to present the final report and receive feedback.

Interview Procedures and Participants

The 25 nonprofit organizations that participated in the interviews represented a diverse group. They offer programs that ranged from community development and gentrification to general health issues and care for the terminally ill. These organizations range from the relatively old such as the Bryan/College Station Chamber of Commerce (founded 1952), to the fairly new such as Aggie Serve (founded 2005). This diversity is also manifested in the service area of the nonprofit organizations. Seven organizations served the Bryan/College Station area, 12 organizations stated that they served the 7 county area, and the rest fell somewhere in between (see appendix 1 for a complete list of participants).

We selected organizations to interview based on a variety of criteria. First, we requested Fall Workshop participants to volunteer for interviews. Second, we found the Brazos Valley's fifty largest nonprofits based on total assets. Finally, we chose interviewees in order to fully encompass the Brazos Valleys diversity. Of 35 originally selected organizations, 25 were interviewed within a four month period.

We developed an interview script and protocol (see Appendix 2) that provided constancy through out the interview process. Each interview was conducted by two group members; one took notes while the other led the session. Findings were reached after data was rigorously analyzed using inter-rater reliability tests.

In addition, we interviewed six university representatives including administrators and academicians. Professors and university representatives were selected on the basis of knowledge of and connection to the nonprofit community. We used the same analysis processes to conduct the university interviews.

Emails were sent to various U.S. community foundations. They were asked to respond to how they funded and executed some or all of the 10 identified community leadership roles. Sixteen foundations responded (See Appendix 6).

Opportunities and Challenges Confronting Brazos County Nonprofits

We asked the organizations where they would like to see themselves in the next five to ten years and what roadblocks might prevent them from meeting those goals. One of the most common responses reflected a desire to expand the range of services or the serve area. Sixteen organizations mentioned that they intend to grow in some capacity including expanding services, new facilities and entering into new markets.

These organizations mentioned several barriers to achieving their objectives. While funding was typically mentioned, the most common areas identified included better public awareness, a desire for stronger inter-organizational partnerships, retaining high quality volunteers and employees, and a perceived lack of leadership in their organization or community. Evaluating the needs of the community can benefit the work of the BCF by understanding what nonprofits confront.

Several organizations mentioned the need for better Awareness of the organization and improving their Image. Organizations felt the public was unaware of who they are or their mission or that there was confusion over their name and services. Eleven mentioned a problem

in marketing their organization or in advertising their services to the public. Some complained of a “lack of a sellable image” while others simply wanted to make their organization more visible and therefore able to provide their services to more people.

Eight respondents indicated a need for better Partnerships. Organizations wanted to work with other organizations in some form of collaboration or partnership in an effort to either increase services, eliminate duplication, or be the organizer of collaborations. A couple of comments pointed out the need for partnerships in general or the lack thereof due to competition with for-profit organizations. As one respondent stated, “You cannot survive without partnerships.”

Six individuals mentioned the need for stronger Personnel including volunteers and staff. The general theme of this category is the difficulty in either retaining or managing the people who help make an organization operate. Comments ranged from a lack of volunteers to a work force that is unavailable for various reasons. Related to this idea is that many individuals discussed a need to improve volunteer leadership on the board. An example from one interview: “Board development is a challenge... we need a good combination of people who are not afraid to go out and ask for money”.

Other areas discussed include a desire for improved government involvement, improving funding capabilities and stability, healthcare costs and industry specific concerns about regulation, etc.

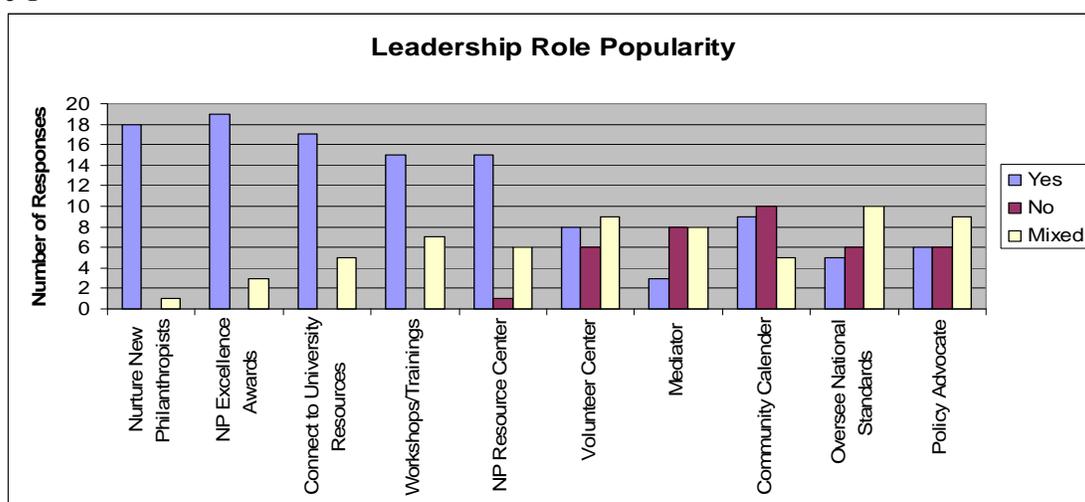
Community Leadership Roles

We identified 10 potential community leadership roles that could be applicable to the Brazos community. These roles were identified through reviews of the literature and discussions with experts in the community (see Appendix 2 for the list of community leadership roles shared with interview participants). Community leadership functions are increasingly becoming a part of community foundations' every day work. The literature indicates that Community foundations need to do community leadership to stay relevant, unique, and useful (Bernholz 2005). This includes a variety of activities that go beyond resource development and asset building. Community leadership addresses the capacity and function of nonprofits as they work to improve the quality of life in their communities. Literature also offers several warnings to individual organizations and their executives as they consider which leadership roles are most appropriate for their foundation and the community.

- Community leadership roles are often difficult and time consuming tasks that can detract from a foundation's asset development responsibilities.
- Many organizations do similar work and community foundations must figure out where there is need and how they can benefit their communities in a way that is does not overlap existing services or resources (Bernholz 2005).

In light of the many challenges facing community foundations, it is important that they efficiently and effectively implement necessary community leadership programs. The remainder of this report considers community leadership roles for the Brazos Community Foundations and considers the feedback from interview participants, university experts, and responses from over 30 Texas based community foundations. Examples are drawn from existing literature, websites and interviews with community foundation professionals. Figure one summarizes the responses from interview participants and the extent to which each role was most supported by the local community. Community leadership roles with the most support are discussed first.

Figure 1



Nurture New Philanthropists

A fundamental leadership role for community foundations is to nurture and strengthen the philanthropic community. Community foundations can identify donors' areas of interest and inform them of pertinent community needs. Often they are able to increase nonprofit organizations' fundraising efforts by "matching" donors with organizations in a number of ways. Giving can also be cultivated by promoting activities that raise community awareness and create social capital (Putnam 1995). Civic involvement and the desire to improve the community can result in more local giving. Community awareness can be raised by actively promoting and marketing community needs. This can be achieved through the use of web sites, newsletters, public service announcements, and donor based direct marketing techniques. Community foundations can also establish corporate philanthropy programs. These programs can both reduce corporations' administrative burden and provide them with tax reduction strategies.

There is growing evidence that donors want to be more involved in the changes in the community that their money is funding. Community foundations are well positioned to help donors meet their giving goals. Other similar roles of community foundations are (Hamilton 2004, 12):

- Introducing local donors and potential donors to "role models" in hopes of emulation.
- "Set up giving circles"
- "Enlarge donors' vision of what is possible"
- "Link donors' knowledge, experience, and networks to places where they are needed"
- Giving Catalogue - annual publication of all the "wish lists" of local nonprofits – this way, individuals can pick what they want to help with.

"Community foundations can engage and mobilize donors as participants and leaders in community problem solving, helping donors to share not just their money, but also their knowledge, expertise, and networks (Bernholz 2005, 39)."

Interviews: We asked interviewees if they felt "Community foundations can identify donors' areas of interest and inform them of pertinent community needs." Of the 19 organizations that responded, 18 said "yes", none said "no", and one gave a "mixed" response. Four "yes" respondents indicated that this role falls perfectly in line with the BCF's mission. Two organizations mentioned that this type of effort should be the BCF's number one priority. Another organization showed concern over area federal dollars being cut and said that the BCF should lead this effort. Four organizations indicated that the BCF could fill this role by making area philanthropists aware of different organizations, their work, and their needs. One organization mentioned that part of their organization already does this.

Nonprofit Excellence Awards

These awards would recognize excellent management and governance practices among Brazos Valley nonprofit organizations. They would also create awareness and publicity for winning organizations and their causes. Community foundations have chosen to award improvement of management practices over time, innovation and creativity, as well as specific notable accomplishments. The recipients of these awards would gain validity in the eyes of foundations and other funders. Additionally, the Foundation offers other nonprofits a set of management

standards to which they could aspire. The awards can enhance the visibility of the foundation, which would draw in diverse peoples to serve on the awards committee. Community foundations can also take advantage of previously established award programs. Local nonprofits and nonprofit volunteers can be nominated by the community foundation for state and national awards.

Interviews: We told interviewees the following: “These awards would recognize excellent management and governance practices among Brazos Valley nonprofit organizations. They would also create awareness and publicity for winning organizations and their causes.”

Of the 22 organizations that responded, 19 said “yes”, none said “no”, and three gave “mixed” responses. One organization suggested that such awards be “dovetail[ed] into the Newman 10 awards. An organization suggested that the BCF recognize community philanthropists as well as stellar nonprofit managers. Another recommended that they recognize volunteers. Three organizations mentioned that awards would help with their marketing and public relations efforts. One organization said that awards would help to bring attention to lesser known and understood community nonprofits. Another suggested that giving awards would help the BCF to increase visibility in the community. An origination offered a warning: to be prepared to “play politics” if the excellence awards role is taken on. Two of the mixed responses were concerned with the choice of who gives the awards, and how they are decided.

Connect to University Resources

Texas A&M University and the various nonprofits in the Brazos Valley represent complex and decentralized networks. Successful community-university partnerships seem to depend on the ability of involved parties to define and understand the various goals and needs of the networks many entities. Common language and definitions as well as clearly communicated goals will greatly increase the chance of successful community-university partnerships occurring (Checkoway 1997; Cox 2000). Connecting various institutions presents many of the network communication problems already mentioned in the discussion of community calendars (Cox 2000). The BCF and the Bush School can help to articulate the benefits of mutual collaboration to both the University and the nonprofit sector. By acting as a “bridge” between two separate nonprofit and University entities, the BCF and the Bush School can help them connect in mutually beneficial ways. The aid of University experts and volunteers has the potential to supply the Brazos nonprofit community with need assistance.

Texas A&M University has a rich tradition of service. With part of its mission being to prepare “students to assume roles in leadership, responsibility, and service to society”, Texas A&M University seems to be a prime candidate for nonprofit partnership. An example of one such partnership can be found at <http://media.www.thebatt.com/media/storage/paper657/news/2008/02/21/News/Charitable.Design-3224798.shtml>

Interviews: We told interviewees the following: “Texas A&M University can be a great asset and ally for your organization. Help would be given to connect with the University resources, such as experts or volunteers that would help your organization.”

Of the 22 organizations that responded, 17 said “yes”, none said “no”, and five gave “mixed” responses. One organization indicating a “yes” response said that this would be helpful because of A&M’s large size. Two other organizations mentioned a disconnect between the University and the community that they would like to see the BCF do something about. Another organization pointed to a lack of involvement caused by competing “theory vs. practice schools.” One organization mentioned the benefits they could derive from potential student volunteers, while another mentioned that they would like to see “professors on the board.” An organization suggested that the BCF could “provide nonprofits with information and direction” in this area, while another said that they could help nonprofits see the university as a resource. Another gave advice to keep any such role organized and consistent, and another organization mentioned that this should not be the BCF’s priority.

Four “mixed” response organizations mentioned that they already have relationships with the university, indicating that they need no more help. Three of these organizations said that while they may not need help in this area, other nonprofits might. One organization mentioned that this role would take a lot of work.

We gained additional insight from our six university interviews. Professors provided ideas and insights on how to implement leadership roles. University administrators discussed their views on the University’s role in connecting to the local nonprofit community (see Appendix 9 for responses).

Workshops and Trainings

Community foundations can serve a sponsor and host for workshops and trainings. Typically these are provided to the nonprofit community but they can also be provided to the general public. As experts on their service area, Community Foundations are in a unique position to identify what works in that particular community and what does not. They can ensure that nonprofits receive accurate and timely information (Hamilton 2004; Bernholz 2005). The Brazos Valley has many unique opportunities and challenges for the nonprofit sector, and training opportunities are only marginally available in the local area. Often these workshops are offered as part of a comprehensive resource center, but they can also be offered in collaboration with other partners in the area.

Interviews: To help interviewees understand the definition we said, “Workshops and trainings would provide management, governance, and capacity building information and tools. These would also provide times to network with other area nonprofit organizations.”

Of the 22 agencies that responded, 15 said “yes”, none said “no”, and seven gave “mixed” responses. Five organizations offered advice on what type of workshops and trainings to offer: grant writing (two mentioned this), standards, governance, startups, management, efficiency, budgeting, leadership, fundraising ideas, accounting software, how to do mail outs, and capacity building. Two organizations said that this was a good role because currently trainings are far away and are expensive. One mentioned networking as being a positive side effect of workshops and trainings. Another said that this role might help nonprofits to retain employees. One mentioned St. Joseph’s Hospital as already doing this, and finally, an organization said that this should be the BCF’s number one priority.

One “mixed” comment mentioned the United Way already partially fills this role. Another warned that the BCF should not “be too burdened with this [role].” One organization questioned whether or not the BCF could bring in attractive speakers or if they would be able to overcome “buy in” hurdles.

Nonprofit Resource Center

A nonprofit resource center provides local nonprofits with a variety of services to strengthen their capacity to serve their various constituencies. This includes a “library” of resources that often includes information about funding sources, technical assistance and a network of potential providers. This type of center can also offer workshops (discussed in separate section), referrals, and consulting services. They often also produce some type of publication that serves to educate and communicate to nonprofits about upcoming events and opportunities. These services are open to all nonprofits and community foundations can use their experience to identify and approach organizations that are in need of specific help (Hamilton 2004, 17). Smaller community foundations can collaborate with other local entities to provide a nonprofit resource center. Foundations can fulfill this role with by simply posting links to nonprofit consultants on their websites. The examples in appendix 3 discuss in more detail potential activities related to operating a nonprofit resource center.

Interviews: We told interviewees the following: “This center could provide information to nonprofits on potential funders, grant writing, and community resources. This type of center could also offer workshops, trainings, and consulting services.”

Overall, the interviews indicated a positive response from the community. Fifteen organizations indicated that this would be an important or critical asset to the nonprofit community. While only one organization gave a negative response, six gave a mixed response. The mixed responses indicated a belief that other organizations in the community are already providing this type of service, would like to, or should. One concern was that this type of endeavor is not within the scope or ability of the BCF.

Volunteer Center

A volunteer center can be a central place for volunteer recruitment, training, and placement. It becomes a one-stop shop for individuals interested in volunteering. A well-established volunteer center has the ability to recognize deep-rooted community problems and given enough discretion, it can help focus organizations and volunteers towards a innovative solutions. A volunteer center could serve nonprofits as a capacity builder for the recruitment of volunteers. In a 2004 study, the Urban Institute found that many organizations did not possess connections to potential volunteers. This capacity-building option points to the value of community volunteer centers. It also validates their role in their ability to match volunteers with organizations that need them (Urban Institute 20).

Volunteer centers can also help nonprofits in training and managing volunteers. According to the Urban Institute, most charities and congregations are unable to invest substantial staff resources in volunteer management. The study found that even those nonprofit organizations that do have a full-time paid staff member as volunteer manager; it is rare that they are able to devote all of

their time to volunteer coordination. Most of the time, managing volunteers is just one component of their job, even when their title is volunteer coordinator (Urban Institute 8). An extensive search revealed no community foundations that operate volunteer centers except in a funding capacity.

Interviews: During our interviews, we told interviewees the following: “This center could be a central place for volunteer recruitment, assessment, and organization matching.”

The responses to this question were very mixed, and did not lean in either a positive or a negative direction. Nine out of the 25 organizations indicated a mixed response, and the other organizations were split between positive and negative. Some organizations expressed the idea that the volunteer center should be linked to the nonprofit resource center in order to maximize efficiency and use.

Mediator

Community foundations can be in the unique position to act as a mediator between like-minded, but in some cases very different groups. Starting conversations among local nonprofits on how to address community needs is one of the “most common and cost effective” community leadership tactics (James Irvine Foundation 2003, 22). This mediation conserves community resources by improving the productivity of nonprofits and reducing the number of unnecessary services and efforts (Hamilton 2004; Bernholz 2005). One such example given by the Wayne Community Foundation is interfaith coordination. They facilitate interfaith meetings for all interested clergy in their area. They help to coordinate and unite these various organizations toward common goals and projects.

In his work, “Treating Networks Seriously: Practical and Research-Based Agendas in Public Administration,” Laurence O’Toole discusses what are known as “wicked problems.” These issues are too complex for one sector to handle and require further collaboration. Policies dealing with complex issues are likely to require networked structures for execution (O’Toole 1997, 46). These wicked problems are numerous in today’s society and can include pandemic, natural disasters, education, security, poverty, etc. In big policy areas like these, the government has different agencies that attempt to solve parts of the same problem, and it is the same in the nonprofit world. In order to achieve something meaningful in any one area, several agencies and organizations must be used.

The following are some ways community foundations can carry out the convener role (Hamilton 2004, 8):

- Making introductions
- Brokering partnerships
- Helping to mend frayed relationships
- Educating disparate players about one another’s work
- Bringing new voices into community decision making
- Linking diverse stakeholders

By bringing together diverse community actors, community foundations help “communities find a more powerful vision and a more unified voice (Hamilton 2004, 8).” Regular communication

and interaction between community service providers fosters partnerships that help these organizations “carry out initiatives, leverage investments and mobilize community participation (James Irvine Foundation 2003, 23).”

When an entire community voices its opinions and takes part in the creation of local programs and initiatives, the community is more likely to view these efforts as legitimate. Community foundations can help build what Putnam calls social capital- “features of social organization such as networks, norms and social trust that facilitate coordination and cooperation for mutual benefit (1995, 67).”

Tools:

- Contacts- community foundations are best at the role of convener when they have extensive networks within their communities.
- Host workshops and meetings- help to educate community leaders on important best practice issues and consequences. These meetings also help to shape community discourse by focusing on issues of great consequence (Bernholz 2005, 38).
- Developing and linking local leadership- This can occur through seminars and workshops or through informal introductions (Bernholz 2005, 38). By hosting these types of meetings, community foundations help to “introduce” community members to each other.

Interviews: We told interviewees: “Community foundations can act as a mediator between like-minded but very different groups. This mediation conserves community resources by improving the productivity of nonprofits.”

Of the 19 agencies that responded, three said yes, eight said no, and eight gave mixed responses. One “yes” response indicated that this role is desirable because it would help to solve duplication of service issues. Another indicated that they supported the BCF filling such a role if they would help to settle “turf issues”, especially among their own clients.

Several respondents felt that mediation was not a good role for the community foundation. They felt that other nonprofits that already fill this role (Project Unity, Community Partnership Board, and Brazos Valley Dispute Resolution Board). Three organizations said that they already have internal mechanisms that fill this role. Three saw this as not being a need in the community. Four thought that a mediator role should not be a priority for the BCF.

Some of the respondents expressed similar reservations about duplication or inappropriate for BCF. For instance, one respondent said that this is a good idea, but does not see it as being part of the BCF’s mission. Another organization urged “extreme caution” for the BCF in trying to take on such a role. Two organizations offered more vague comments, saying that “someone has to do it”, and that it’s “an interesting idea.”

A possible component of the mediator role we failed to discuss in the interview process is that of information clearinghouse. Community Foundations can act as a central place for the retention and distribution of community information. A central objective location ensures that information can be correctly and easily made available to the nonprofit sector as well as the general public. The Dallas Indicators Project and the Rhode Island Foundation’s Kids Count project examples that follow give specific ways that this role can be carried out.

Community Calendar

A centralized community calendar could allow all Brazos Valley Nonprofits to better inform the nonprofit community of their events. A centralized community calendar would allow organizations to schedule events to minimize overlap and maximize their impact and success.

While this calendar seems to offer community benefits, multiple challenges arise:

- Communication and coordination within a network can be difficult (O'Toole 1997; Agranoff and McGuire 1999).
- Various stakeholders already producing calendars may not want to give this function up – ownership becomes an issue.
- Viability is uncertain. It is unclear whether something like a centralized community calendar will be accepted and used in the Brazos Valley.

Despite these conceivable roadblocks, other methods might be employed in order to achieve the desired benefits of a community calendar:

- Work with organizations that already have a community calendar function. The BCF can foster communication and possibly cooperation between the various calendar producing entities in the Brazos Valley (lifeinthebrazos.com, [the Arts Council of Brazos Valley](#), [KBTX](#) and [KMAY](#) to name a few).

The BCF could possibly get a neutral third party (not present in the Brazos Valley) to host an online calendar that all in the nonprofit community can post to and utilize.

Interviews: To clarify the definition we told interviewees the following: "A community calendar would allow all Brazos Valley Nonprofits to inform the nonprofit community of their events and event dates. This would allow organizations to schedule events to maximize their impact and success."

Of the 24 agencies that responded, nine said "yes", 10 said "no", and five gave "mixed" responses. Besides generally approving comments like "good idea" and "very beneficial", four organizations mentioned current confusion caused by multiple community calendars, rendering them ineffective. They seemed hopeful that a centralized community calendar could alleviate some of this confusion. One organization said that such a calendar would help with marketing. An organization said that the community foundation would be good at filling this role because they would be able to be a neutral party. Finally, one organization gave a "yes" response with the warning that any entity trying to fill this role would be facing a difficult task. They further counseled that the BCF would have to investigate aggressively all area events, including university and business activities if they wanted to fill this role.

Of the 10 organizations that gave negative comments, four mentioned the United Way or 211 as already filling this role. Additionally, three organizations thought that the Chamber of commerce should fill this role. Two of these organizations specifically mentioned duplication of services being a danger if the BCF were to try to undertake a community calendar. Two organizations pointed to this being too difficult of an undertaking because getting organizations to report would be very hard. Two other organizations viewed this role as not needed in the community.

Mixed comments generally pointed to the difficulty of such an undertaking. An organization asked how a single calendar will gain legitimacy as “the only calendar” when there are so many in existence already. One organization mentioned 211 as already doing this and another mentioned the Chamber of Commerce as being a good candidate for such a job.

National Standards

There is growing recognition that National Standards are useful for nonprofits because it helps establish the credibility of nonprofits and provides a universal measure to compare different types of nonprofit organizations. Implicit in these standards is that they improve the quality of management practices among nonprofit organizations leading to healthier and more productive organization. “Unclear goals and progress measures make it difficult for communities to judge whether interventions are working. Some community foundation leaders and staff play a valuable role by helping define credible performance targets, accepting accountability for progress towards goals, and evaluating and publicizing results” (Hamilton 2004, 18).

Community foundations are able to help local leaders and their organizations address important issues such as measurement, accountability, and evaluation. They are also able to help them understand how such measures can inform their organization’s activities and decisions (Bernholz 2004, 39). Community foundations can act as a gatekeeper by making performance measurement results known to the public. This increased knowledge helps inform individual, government, and corporate giving- effectively “weeding out” ineffective and poor performing organizations (Hamilton 2004, 18-19).

Community foundations can:

- Help develop a “common language, vision, and set of expectations” among those they serve (Hamilton 2004, 19).
- Use their experience to frame issues, recommend best practices, and identify problem areas that need further research (Hamilton 2004, 18-19).
- Use their influence to communicate which organizations will best use the resources they are given (Hamilton 2004, 18-19).

Interviews: Once again, to clarify we told interviewees the following: “This would increase the quality of management practices among nonprofit organizations in the Brazos Valley. Best Practice Standards would give added credibility to all organizations that meet the standards

Of the 21 organizations that responded, five said “yes”, six indicated “no”, and 10 indicated “mixed” responses. One organization said that they favored national standards because of the added credibility they might give area nonprofits. Another mentioned the benefits coalitions of nonprofits could have when approaching policy makers – national standards would give them a means to unite. Another organization thought that national standards would be good for small or startup nonprofits that are sometimes “run in bad ways.” They believe that national standards could act as a reference source for these organizations.

Three “no” organizations said that they have internal mechanisms that already monitor standards- one specifically mentioned their board. Two organizations worried about the extra amount of work that national standards would entail. Two organizations saw administering national standards as not being the BCF’s role.

One “mixed” comment said that for such an initiative to work it would have to be voluntary. Another organization thought it would be too cumbersome if audits were involved, and that this was the job of each organization’s board. Two organizations said that this role belonged under “workshops and trainings.” Two more said that it would be very difficult to get area nonprofits to participate in such an endeavor. One organization said that national standards would only be useful if they do not “cause a lot of extra work for the organizations.” Finally, an organization said that this would have to be a joint effort.

Policy Advocate

An advocate for policy solutions brokers regional solutions by cordoning efforts across multiple sectors. They could also help the community to connect with government resources by advocating policy solutions to local nonprofit needs.

“The solutions to many problems extend beyond the boundaries of any one city. Yet developing a common vision and concerted action across cities, school districts, police departments, and so forth can be difficult unless someone steps forward to facilitate the process. As even-handed conveners for community visioning and problem solving, community foundation staff often have the sophisticated process skills needed to help players across the region work together (Hamilton 2004, 9).”

There are several roles that community foundations can play in advocating for policy solutions (Bernholz, 2005, 38-39):

- “Brokering regional solutions: Community foundations can help to facilitate action across cities, school districts, and service areas to address regional problems that extend beyond the boundaries of any one city.”
- “Maximizing access to government resources: Community foundations can help communities to connect with the public sector to access government resources and develop collaborative solutions.”
- “Advocating and partnering for policy solutions: With the devolution of federal authority to state and local control, community foundations are increasingly becoming active policy advocates on a range of community issues. More community foundations will pursue policy roles, either directly or indirectly, as the issues their constituents face cannot be addressed solely through grant funding.”

Government procedure and regulations can be confusing and overwhelming to individual organizations within a community. Community foundations, by gaining knowledge of issues and possible solutions, can help their community to effectively interact with local, state, and federal government (Hamilton 2004, 14).

The question of neutrality: One danger of community foundation involvement in policy advocacy is a potential violation of their neutral status. This type of violation could alienate members of their community that they are trying to help. The James Irvine Foundation article “Community Catalyst” gives an example of some criteria that Ventura Community Foundation uses to decide on their level of involvement in a particular policy issue. They will be involved if (2003, 25-26):

- The issue is of paramount importance to Ventura County’s future.
- The Alliance’s position has overwhelming consensus among Alliance participants (defined as 92 percent, or 46 of the 50 members).
- There is no other group that can fill the gap or take on this role.
- The position is fully consistent with the mission, principles and values of the Alliance.
- The position is deeply grounded in an objective analysis of the issue.
- By taking a position, the Alliance adds significant value and weight to the policy debate.
- The Alliance’s intended policy outcome is agreed upon and achievable.
- The position will not compromise the Alliance’s credibility in the community. (James Irvine Foundation 2003, 25-26).”

Interviews: To clarify, we told interviewees: “The Brazos Community Foundation could help to broker regional solutions by cordoning efforts across multiple sectors. They could also help the community to connect with government resources by advocating policy solutions to local nonprofit needs.”

Of the 21 organizations that responded, six said “yes”, six said “no”, and nine gave “mixed” responses. One “yes” respondent said, “If you are not out there making noise, you are overlooked.” This respondent said they already have efforts to do this, but indicated that any additional effort in the community would be welcome. Another organization suggested that whoever takes on this role could “help get the word out on laws.” Another said that, like the national standards, any effort to add credibility is good. Finally, one organization suggested that the BCF work with TANO and other statewide organizations in trying to fill this role.

Two of the “no” respondents said that they already have organizations that do this for them. One organization said that this is what the COG does. Three organizations warned that policy advocacy is not included in the BCF’s mission. One of these organizations worried that this type of action could hurt the BCF’s ability to raise money.

Two “mixed” response organizations warned that filling such a role would be difficult because of the diversity in the local nonprofit community. One of these organizations said that the BCF would have to focus on very broad issues for it to work. Two mentioned that other organizations already do this, indicating that there is no need for the BCF to. One of these also thought that the BCF lacks the experience and personnel power now to fill such a role. Another organization suggested that any such endeavor would have to be a community wide effort. Finally, an organization warned that this would be a “big job.”

Conclusion and Recommendation

Goal 1: Identify potential community leadership roles for the BCF

We met this goal by effectively conducting a review of relevant literature on community foundations' societal role. We also uncovered community leadership best practices through both literature and various examples.

Goal 2: Prioritize potential community leadership roles for the Foundation

After conducting interviews with local nonprofit leaders and university representatives, we rigorously analyzed responses and subjected them to inter-rater reliability tests. We used this information to develop five recommended community leadership roles. We chose these roles based on community support, resource availability, and BCF mission alignment.

Goal 3: Support the Foundation's ability to implement one or more of the community leadership roles.

We developed a series of action steps for the implementation of the five recommended roles:

- Nurture New Philanthropists
 - Bring together philanthropists
 - Education, cooperation, and mentoring of current and potential philanthropists
 - Matching donor interests with community needs
 - Find ways to keep money in the Brazos Valley
- Nonprofit Excellence Awards
 - Create a Nonprofit Management Award
 - This award can be given at a Nonprofit Forum
 - Create a collaborative selection and review panel
- Workshops and Trainings
 - Past Capstone nonprofit forums and workshops can be a basis for the future
 - Coordinate work with others
 - Provide opportunities for local trainings and workshops
- Connect to University Resources
 - Further develop partnership with Bush School, Aggie Serve, etc.
 - Foster the creation networks between community and university entities
- Nonprofit Resource Center
 - Participate in efforts to organize and develop a nonprofit resource center

Goal 4: Increase community awareness of the Foundation

In October, we hosted the Fall Nonprofit Workshop and Townhall Meeting. Fifty people attended to hear Ms. Rose Mary Fry speak about nonprofit standards. In April, we hosted the first annual Bush School Spring Nonprofit Forum. This all day event was attended by over 100 community members, and included two keynote speakers, a speech by Dr. Elsa Murano, President of Texas A&M University, as well as six workshop sessions. This event was covered by two local newspapers, The Bryan/College Station Eagle and The Battalion. See the following links to read these stories:

<http://media.www.thebatt.com/media/storage/paper657/news/2008/04/23/News/Bush-School.Sponsors.Forum.To.Train.For.Nonprofit.Work-3342439.shtml>

<http://www.theeagle.com/lifestyles/Working-together>

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Appendix 1 – Interview Participants

Table 1

Organization	Year started	Service Area (7-county, B/CS, other)
Aggie Serve	2005	B/CS (listings from Hearne and Houston)
Arts Council	1969	7-county (with rural outreach)
Big Brothers Big Sisters	2001	B/CS
Boys & Girls Club	1959	B/CS
Brazos Animal Shelter	1984	7-county
Brazos Valley Affordable Housing Corporation	1992	7-county
Brazos Valley Community Action Agency	1972	12-county
Brazos Valley Food Bank	1985	6-county
BV COG	1967	7-county
BV TROUPE	1994	7-county
Chamber of Commerce	1952	B/CS
Children's Museum	1996	?
Cities of Bryan and College Station		B/CS
Diane Mier	n/a	n/a
Habitat for Humanity	1989	B/CS
Hospice Brazos Valley	1989	17-county
Junction Five-O-Five	1981	B/CS
Junior League	1982	B/CS
Mental Health Mental Retardation Authority	1974	7-county
Project Unity	1995	?
Rape Crisis Center	1983	7-county
St. Joseph's Regional Healthcare	1935	7-county
Twin City Missions	1963	7-county
United Way	1953	7-county

Appendix 2 – Interview Script

Questions:

- 1) Tell us about your organization (what you do and what programs and services do you provide. History of organization; Major milestones)
- 2) What do you see as your service area? Do you serve the entire Brazos Valley?
- 3) Where would you like to see your organization in 5/10 years? What are some road blocks to getting there?
- 4) What are some of the other challenges facing your organization? (Can you get services out to the rural areas? Do you have a dependable source of funding? Grants? Other specifics)

- SHIFT- We are now going to get them to shift from thinking of self to community roles and functions. – This will be hard (possibly).
- 5) Have you heard about the Brazos Community Foundation? If so, what do you know about them? (Trying to find what people’s level of awareness is already)
- 6) We tell/ask them: Community leadership roles (Use the sheet)
 - Explain how these roles work (if there are any questions)
 - Now go through the sheet- hit points “How helpful do you think each of these tools/services would be to your organization and to the Brazos Valley?”
 - What other things would you like to see?

(Note: community leadership is not just from the BCF)

- 7) Is there any thing else you would like to tell us?

Community Leadership Roles

- Nonprofit Resource Center – This center could provide information to nonprofits on potential funders, grant writing, and community resources. This type of center could also offer workshops, trainings, and consulting services.
- Volunteer Center- This center could be a central place for volunteer recruitment, assessment, and organization matching.
- Community Calendar – A community calendar would allow all Brazos Valley Nonprofits to inform the nonprofit community of their events and event dates. This would allow organizations to schedule events to maximize their impact and success.
- Mediator – Community foundations can act as a mediator between like minded but very different groups. This mediation conserves community resources by improving the productivity of nonprofits.
- Workshops and Trainings – Would provide management, governance, and capacity building information and tools. Would also provide times to network with other area nonprofit organizations.
- Nonprofit Excellence Awards – These awards would recognize excellent management and governance practices among Brazos Valley nonprofit organizations. They would also create awareness and publicity for winning organizations and their causes.
- Oversee the use of National Standards for local nonprofits – This would increase the quality of management practices among nonprofit organizations in the Brazos Valley. Best Practice Standards would give added credibility to all organizations that meet the standards.
- Help Connecting to University Resources – Texas A&M University can be a great asset and ally for your organization. Help would be given to connect with the University resources, such as experts or volunteers that would help your organization.
- Advocate for Policy Solutions- The Community foundation could help to broker regional solutions by cordoning efforts across multiple sectors. They could also help the community to connect with government resources by advocating policy solutions to local nonprofit needs.
- Nurture New Philanthropists - Community foundations can identify donors' areas of interest and inform them of pertinent community needs.

Appendix 3 - Community Leadership Examples

Nurture new philanthropists

Community Foundation for Southeastern Michigan

Matching Gift Program for Agency Endowment Gifts

The Community Foundation partners with nonprofit agencies to build charitable endowment. Donors may make match-eligible gifts to more than one agency endowment fund, as long as each agency is participating in the match program. The Community Foundation will match new gifts of \$1,000 or more to the endowment of a participating agency. For every \$2 of gift, the Community Foundation will provide \$1 of match. Any single donor may earn up to \$150,000 in match for any one participating agency's endowment. So, a maximum of \$150,000 in match would be earned on a gift of \$300,000 or more. Any single agency participating in the Increasing Regional Philanthropy match opportunity can earn up to \$500,000 in match dollars from any combination of donors.

http://www.cfsem.org/phil_minisite/for_nonprofits/pdfs/general_agency_faq_5-06.pdf

Oklahoma City Community Foundation

Matching Endowment Gift Opportunities

The Oklahoma City Community Foundation acted as a fund generator by providing incentives for donors to donate to causes of their choice. The Foundation offered grants to charitable organizations that then had to match the grant with a specified amount. Instead of leaving all the work to the individual organizations, the Community Foundation setup a website where donors could contribute to the funds being raised specifically for the matching gift. In other words, instead of donors simply donating money to the organization that could get used in any number of ways, the donor can now put the money to a specific project for which the organization is trying to match funds. This allows donors to see exactly where their money goes and it helps organizations who might otherwise have a difficult time raising matching funds.

http://www.occf.org/occf/matching_grant_opportunities/index.php

Catholic Community Foundation

Gift Matching Program- Many Community Foundations participate in gift matching Programs. Here, potential donors can get their gift to the community foundation matched by a number of community sponsors. In the past The Catholic Community Foundation has been able to have gifts matched by 33 different companies and charitable foundations. This multiplies the effect of a single donation made by someone in the community while creating an additional avenue for business and charitable foundations to give back to the community.

http://www.ccf-ic.org/support/ts_matching_gifts.php

Nonprofit Excellence awards

The Metropolitan Atlanta Community Foundation

Managing For Excellence Awards

“Each year the Metropolitan Atlanta Community Foundation gives public recognition and cash awards to nonprofits that have improved their management practices over time (Ylvisaker pg 246).” The Community Foundation gives awards in three categories for nonprofits that have improved, and one for sustained goodness. The awards include a \$5,000 unrestricted grant and free access to all foundation workshops.

<http://www.atlcf.org/GrantsScholarships/Grants/ExcellenceAward.aspx>

San Francisco Foundation

Through their various awards programs, San Francisco Foundation rewards accomplished, risk-taking pioneers for seeking ways to innovate and create. According to the foundation, “These talented leaders’ visions, stories, and work renew our community and enrich our lives.”

The San Francisco Foundation has three award programs for their community:

Community Leadership Awards: showcase individual or organizational excellence in leadership as demonstrated by outstanding initiative, impact of work, and inspiration of others. (<http://www.sff.org/programs/awards-programs/community-leadership-awards>)

Art Awards In the spirit of honoring arts awardees, partners, and jurors who reflect the strength and diversity of our arts community, we invite you to join us in celebrating the 2007 Art Awards winners. (<http://www.sff.org/programs/awards-programs/art-awards>)

Koshland Young Leader Awards The Koshland Young Leader Awards, a scholarship established by Dr. Daniel Koshland, Jr., provides \$5,000 each to at least four outstanding San Francisco public high school juniors from low-income families. (<http://www.sff.org/programs/awards-programs/koshland-young-leader-awards>)

Connect to community Resources

The Greater Milwaukee Foundation (Hamilton 2004, 6).

The Greater Milwaukee Foundation chose to add “information broker” to their list of roles. This means that they decided, as part of a long-term plan, to gather information regarding poverty in the area, and why it is remaining at the same level in spite of programs and efforts designed to reduce it. This involved working with the University of Wisconsin-Milwaukee to help gather the information and write the reports that were then distributed to donors, policy makers and grantees. In choosing this role, the Foundation became a source of information as well as funding for the community.

<http://www.greatermilwaukeefoundation.org/>

Workshops and trainings

Community Foundation for Palm Beach and Martin Counties

The NRI offers a variety of practical and effective workshops on important topics. These trainings focus on important issues facing nonprofits. The Resource Institute provides workshops on various topics from ethics in the workplace to marketing for nonprofits, as well as online resources for grant information, etc. <http://www.cfpbmc.org/page27831.cfm>

Nonprofit Resource Center

The Community Foundation of Sarasota County

“The Nonprofit Resource Center's mission is to provide education, tools and resources to strengthen nonprofit organizations as they pursue excellence in meeting their missions.”

<http://www.cfsarasota.org/NonprofitResources/tabid/53/Default.aspx>

The Nonprofit Resource Center offers numerous capacity building tools and resources to support the important work of nonprofits in the community. They offer individualized consultation in all areas of nonprofit management, including board development and strategic planning. They host an annual Nonprofit Forum to provide meaningful discussions about nonprofit issues with roundtables covering subjects such as advocacy, governance, management, and marketing. The Resource Center also provides workshops throughout the year on fundraising, planning, governance, management, etc.

The Resource Center publishes a quarterly Nonprofit Resource Guide with information about workshops and events, tips for nonprofits, and other information.

Community Foundation of Broward

“The mission of the Nonprofit Resource Center is to provide resources that strengthen and support the leadership and management of Broward County’s nonprofit sector.”

(<http://www.cfbroward.org>)

Services of the Nonprofit Resource Center include an interactive website with links to other websites on an extensive array of management tips. They offer training programs for everything from board development to financial management and they produce a newsletter with information for capacity building. They also provide technical assistance through phone consultation and one on one meetings.

Mediator

Education Foundation of America and the Bridgeport Area Foundation:

These two entities decided to focus on teen pregnancy in the Bridgeport area.

First they recognized a need in the community. Next, they focused on the problem as a collaborative effort with existing non-profits. In the course of their efforts, they served as a mediator between two nonprofits that held differing views on taking care of the same problem. The Bridgeport Area Foundation served as a nexus for local nonprofits in addition to being a funding agent.

(<http://www.fccfoundation.org/>)

(Kezerian, Steve. “Bridgeport: Teenage Pregnancy” An Agile Servant.)

Arizona Community Foundation

By taking the lead in starting a statewide children’s fund, other nonprofits in the community began to see them as the go-to organization for the issue, and lent their talents to the organization. The ACF focused on an issue that was important to the community. After doing that, other organizations began to see them as the go-to organization for that issue. Because of the foundation’s efforts, the Arizona state legislature created a coordinated statewide, state run children’s mental health system.

(<http://www.azfoundation.org/>)

(Rasmussen, Irene. “Arizona: At-Risk Children” An Agile Servant.)

Arizona Community Foundation

Catalyst of Change – After focusing exclusively on asset building, the Arizona Community Foundation for the better part of eight years, the foundation sought to focus its efforts and capital on a social need in the community. Not knowing where they should focus their efforts, the

foundation reached out to the community and found that children's mental health was deficient in the State of Arizona. With the foundation taking the lead on the issue, agencies and other nonprofits were spurred into action, culminating in the creation of a state-run children's mental health system. By taking charge of an issue, the Arizona Community Foundation was able to act as a catalyst of change state-wide.

<http://www.azfoundation.org/>

Rasmussen, Irene. "Arizona: At-Risk Children" An Agile Servant.

The Dallas Community Foundation (Information Clearinghouse)

"The Dallas Indicators Project, launched in [March 2004](#), is a web-based community resource for data and information about Dallas and the surrounding eight county area. It was established not only to increase the visibility of the Foundation within the community, but also as a response to the identified need for an objective and central base to feature and democratize all the information available to the public. It is seen as a resource for everyone within the community from politicians to families, private businesses and non-profits."

Dallas Indicators is an effort to create a comprehensive single source for community-wide data, led by The Dallas Foundation and the Foundation for Community Empowerment. Based upon the premise that "what gets measured gets done," Dallas Indicators is a comprehensive database grouped by 10 major aspects or "compass points" of community life. After thoroughly reviewing successful community-based projects throughout the country, interviewing more than 150 local civic leaders, and compiling research from multiple sources trended over time, the Dallas Indicators database now provides the Dallas-area community with objective and factual information that can be easily accessed in a user-friendly web-based format.

Dallas Indicators provides opportunities for city leaders, nonprofit organizations, and businesses to use data to understand how they compare with their peers in other metropolitan areas. For nonprofit organizations, Dallas Indicators can help identify gaps in services and provide useful background information when seeking funding. The data does not set the agenda for addressing the community's challenges, but rather highlights the trends of each of the 10 compass points, creating a fact-based platform for transformative change.

Dallas Indicators provides a library, workshop information, basic information about the importance of topics from children and health insurance to crime rates. It is an effort to encourage people to get involved in their community.

<http://bestpractices.cof.org/community/ViewExample.cfm?itemNumber=1029>

Rhode Island Foundation (RIF)(Hamilton 2004, 7); (Information Clearinghouse)

The RIF decided to communicate with the public and with policy makers about children's conditions in Rhode Island. They decided to adopt an information gathering system used in other states called KIDS COUNT. After funding and starting KIDS COUNT, the foundation set up the program as an independent organization. In order to ensure that the data found by KIDS COUNT reaches key policy makers, the RIF spearheads multiple communication efforts, including the publication of a yearly fact book. The efforts of the RIF and KIDS COUNT have generated over \$60 million dollars to increase childcare subsidies for low income families.

The RIF can be looked at as a good example of how community foundations can effectively communicate important information and ideas. For Rhode Island, RIF's communication and

information dissemination efforts made a real difference in the lives of many children.
<http://www.rifoundation.org/matriarch/default.asp>

National Standards

Standards for Excellence in the Nonprofit Sector

This organization provides “a model of how well managed, responsibly governed, nonprofit organizations operate.” Through this program there are 55 performance areas each individual organization measures. These include mission and program, governing body, conflict of interest, human resources, financial and legal, openness, fundraising, and public affairs and public policy.
<http://www.standardsforexcellenceinstitute.org/index.html>

Policy Advocate

Ventura County Community Foundation

The Regional Civic Alliance of Ventura County was formed by the Ventura County Community Foundation (VCCF) as a forum for discussing and resolving community issues. The VCCF makes a concrete effort to remain neutral in all discussions between Alliance members. Through various failures and trials, the VCCF learned that a united neutral front when issues were debated. Their roll is not to push for one solution or another, but to push for a solution. They view themselves as a community catalyst- a community agent that forces the addressing of important issues.
<http://www.vccf.org/>
(James Irvine Foundation 2003, 25-26).

Appendix 4 - Interview Responses Synthesized – Challenges and Opportunities – Questions 3 & 4

Expand Services / Service Area

Making sure that they meet community needs and goals

Stick to their goals

Need to be thinking of other “books of business” like veterans with Post Traumatic Stress Disorder. They currently do not perform those services because they cannot use the state dollars to fund such a program without breaking their contract with the state.

To be in the entire BV

Want to expand, but they do not want to exceed their capabilities.

Increase number of families served – need help with more funding and staff

They want to build 30 houses per year in 5 years

As part of their 5/10 year plan they want to grow to meet the needs of the changing population (the Baby boomers).

Do more work in the rural counties

Increase the number of programs and size

Commented that no museums earn 100% through the door

Currently earning 40-50% of revenue “through the door” – they wish to be up to 70%. Increase the number of programs and size. Commented that no museums earn 100% through the door

They would like to have 1 or 2 counties with a center with full time staff, and a full time councilor.

They would like to serve more people – particularly in specialty services which are less invasive

Would like to promote the growth of certain industries associated with Texas A&M:

- Biotech
- Commercialize A&M Research
- Genome Medicine

Address the lack arts /cultural centers in the community, increase the local concern/desire for arts organizations

They want to be more of a pet resource center- a meeting and training space/

Grow their staff to include a full-time education director.

Information Technologies

Because the system is borrowed, it is full of bugs. it crashed a few weeks ago. They want to build a completely new system. They want the students to be able to contact the agencies directly.

They also want a Calendar that would be made by their IT people. They would also incorporate ideas and feedback from agencies and students that they have received since 2005.

Marketing

They would like to become even more recognized in the community

Also want to have more chapter orgs. in surrounding areas

Getting the word out to people is another roadblock. . But they do not want to exceed their capabilities.

Have a lack of sellable image (they are not like the American Cancer Society that feeds on people's emotions, in a good way). People do not feel like theater is a "core service" like the fire department, but he feels like it is a core service for quality of life.

They need a new Name to mirror what they do as an organization

Getting the word out to people is another roadblock. They are often confused with Boys and Girls Clubs.

Increase the local concern/desire for arts organizations

The blank has a few supporters who support the organization strongly however, there are a few detractors who are very vocal. Overall, not many people even know about the organization. So far he sees that they are doing well to repair the image of the blank. They are going above and beyond industry standards and their own expectations.

Want lots of growth in membership- funds etc.. "we are a best kept secret" change in who members are , they are also seeing the needs in the community grow.

Need to Market Public Awareness - they have no one in charge of marketing

More education- people do not understand that you need to spay and neuter pets- need to educate the younger generation on this.

Awareness of the organization

Challenges: get people to know who the United Way is and what they do

Apathy is a big challenge. People are happy somebody is working with the kids but they don't want to do it themselves. It is easy to get people to watch their own kids, but getting people to

watch other people's kids is difficult. Keeping things fresh is a challenge too. The children, with their young minds help keep the "creative juices" flowing

This community is transient, so the shelter wants to teach them good practices NOW and then they can bring them elsewhere. OVER POPULATION IS A BIG PROBLEM! If this stopped- they would be out of a job.

Community awareness – difference in services (United Way vs. BCF)

Proper image

They are often confused with Boys and Girls Clubs

Another roadblock is the lack of sellable image (they are not like the American Cancer Society that feeds on people's emotions, in a good way). People do not feel like theater is a "core service" like the fire department, but he feels like it is a core service for quality of life.

They need a new Name to mirror what they do as an organization

They need a new Board Dynamic:

- It needs to be revamped to reflect the current situation & to reflect the community and the other counties

Need to Market Public Awareness - They have no one in charge of marketing

He wants to resolve recent controversies.

Become Self-supporting

Currently not self-supporting, would like to be self-supporting within five to ten years. And grow to have the staff to support the program.

See the CDFI run from 1.3 million in capital to 10-15 million so that it will be self sustaining

In 5-10 years the organization would like to be financially stable.

They would like to build a financial base and pay off loans

To do this, they would like to diversify into long term contracts

Partnerships

They DO have a strategic plan: grow AND collaborate with other health care organizations. He said, "You cannot survive without partnerships" in the health care industries.

They would possibly like to partner with another program to do residential services.

Eliminate duplication of efforts from partners

Position to be a community collaborator – other groups trying to do it but not taking the time to see what else is out there – lots of turf battles

The big challenge for Hospice is there are three for-profit hospices in the community.

These are their competition.

More collaboration – what are you doing and how are you doing it, plus how can we work together to serve people and get hem off our services?

Partnerships needed

Personnel

They need to keep a strong base of volunteers (many volunteers are family members of previous patients). They have lots of student volunteers as well.

There are not enough volunteers. High Demand

They have difficulty retaining employees due to low pay.

75% of members work outside of the home (not how it use to be) – so they don't have as much time. BUT they are highly skilled.

A lot of agencies won't take the help they need – people are too busy to coordinate volunteer

Problem – there is a shortage of health care professionals

Leadership

Internal

They want to get cost benefit and results data, they want to prove that what they are doing has been working. They want this to eventually be a national system, they want right to infiltrate wrong.

They need a new Board Dynamic:

- It needs to be revamped to reflect the current situation & to reflect the community and the other counties

Continue to be Active

Keeping a strong solid membership base

Board development is a challenge. They have a small board and she is trying to increase the membership. She wants a good combo of people who “blow up balloons as well as aren't afraid to go out and ask people for money”.

The staff can't do fundraisers, so it falls to the board

Board development – help see all the options

Board diversity – informed members with expertise

External

They want there to be one system, and one group analyzing it. They want Local state and federal committees looking over this system.

Government Involvement

They face the problem of having the government getting too involved in their operations and forcing them to watch the dollar too much to where they lose sight of the client's needs.

Potential problem – Healthcare reform

Development/Capacity Building

NP Community needs the following:

Accountability

Performance management measures – how the organization is making a difference – not just numbers

A need to get agencies to evaluate their programs

This is becoming a bigger requirement from funders

Focus on long term needs – why do you need assistance and how can we address the whole problem?

Community awareness – explain the difference in services (e.g. United Way vs. BCF)

Partnerships need to be developed

Training needs to be supplied

Other

Some of the roadblocks to achieving their goals include a nursing shortage, increasing health care costs, rising gas costs (they have to drive a lot), growth of the patient census (baby boomers).

Future: immigration and water resource planning will become vital.

Roadblock: local politics, controversies. (Did not feel comfortable elaborating.)

Very organized – meetings from September through may- they meet once a month

Would like to see less of a dichotomy between Bryan/College Station and the University

Appendix 5 –Interview Responses Summarized – Reactions to community leadership roles - Question 6

Nonprofit Resource Center:

Hospice could use grant-writing help. How do you focus on the needs of everyone though?

Need to be doing it

Yes – Very valuable tool for community; not a lot of overhead

At this stage their organization has less of a need for this because they already know how to do a lot of this. However, it could be useful for smaller nonprofits

United Way does this – 211

Some trainings are needed

Don't focus on potential funders or grant writing

Already done by the Center for Community Support TAMU

“great - always a good resource” would help locate agencies to fund

would need to get funded – , the community foundation is not sort of a one woman show- could not do this right now. the United way did this before- but it didn't work. would be good to find the history of this. Comm foundation should do it if it can be done will. must not take away from their mission. Might require different skill sets that they don't have. It should not be like a mechanic trying to fly an airplane. Look at examples- do research first.

would be very beneficial

Awesome*

would be a good idea; there isn't a lot out there for this

we are growing to this point, the only one that he is aware of in Texas is in San Antonio. Having something like this locally would be good so nonprofits could readily use it.

505 thinks this is a great idea

Great idea, must be 2-sided?, get businesses on board to provide services, cannot show favoritism among service providers, keep the money in the community, there are already several organizations that do this for their constituencies (ACBV, United Way, C.O.G.), the BCF must see who is doing what and be able to show funders the reason for duplicating some services.

Huge help. Will take the organization from good to great.

would be great

Would be beneficial to them. They will not have to spend travel money to attend workshops.

They said the United Way had one about five years ago but it no longer exists.

good idea, the BCF should participate and coordinate but it is not their responsibility to run – the united way and the cities (CDGB) already feel ownership of this

others could benefit – but she said that they have been through it (starting up and connecting) 5-10 years ago (she didn't get that they could help with grants). There is not much that's Brazos Valley Oriented – good for new Executive directors etc....

Having a place to go to resolve issues is big. Being a resource like that is essential. If they can do it it would be great.

A GOOD IDEA- there is confusion about what events are going on in the same day. VERY beneficial.

Volunteer Center:

No – a lot of overhead, most of your large nonprofits probably already have departments to deal with this. May work for smaller nonprofits, but the BCF needs to think if they can handle it.

Someone needs to do it. Not sure if the BCF should.

maybe, they have been looking at this pretty hard themselves. They struggle with using volunteers in their agency and are trying to figure out how to maximize the use of their volunteers

Already tried by United Way/211

community needs it, United Way would like to do it

People call United Way all the time to find out where to volunteer

it would be nice, but not imperative

Same as above, United Way tried it, didn't work. United way is trying to become more involved in human service provision. There is a big conflict of interest here.

closest = RSVP CERT

Needs to be independent (or at least have an independent name) in order to attract more users.

Not good for hospice, but may be valuable for other organizations.

an option for us to recruit from / offer something

Awesome

505 thinks this would be very helpful; largely the organization does not use volunteers and relies on community service people. They have however considered using volunteers → they were most interested in this

could be useful but it would be best if it came out of the nonprofit resource center

There are a lot of volunteer center in the area, and having someone coordinating these efforts would be useful. It wouldn't really help them directly in their organization because they don't use them very much. They do have interns, and have funded home repair projects that use volunteers.

Already tried in the area

Hugely helpful. Currently working with Tiffani on a project regarding volunteers

They use more volunteers than any other organization locally. A&M has a volunteer group but they are unaware if it is still in existence.

too much work for one group – each org already has an independent coordinator – maybe they could give out info about where to volunteer

NO! absolutely not needed, the COG and RSVP already do this

Would be a big problem on its own (too much to handle) use full BUT- such a huge task ... types of volunteers needed are very specific.

Each organization should be able to do that on their own. But, if there is a central place for people to go it may serve the community well.

This would be good. matching and then they would be able to track and know if it was a successful pairing – something that they cannot now do. (trafficking)

Do you work with student groups- “yes” – she advised Big Event, Alternative Spring Break, Replant, etc... These are just one event deals, they all have no prolonged volunteer capacity.

A possible workshop for sororities etc... to encourage more volunteering in the LOCAL community- she says that this would be a good idea.

Community Calendar:

UW tries to do it. It is a “silo” issue. This means each organization does things with little regard for other organizations. Someone needs to overcome this and coalesce to bring something like this to pass.

No – 211 through the United Way already does this.

Feels like it is not an issue that it is not so valuable for the community. He also feels that other organizations could do it better.

Sees it as a duplication of 211, and thinks that it is already pretty comprehensive

211

Already done by 211

This would be very beneficial. There is supposed to be a group at A&M working on something like this for the students – Service Advisory Community

United way does a good job at this. But most points are what they are pushing. Community foundation could do a better job at this, they would be more neutral.

would be good- they use the chamber of commerce and visitor center’s calendars’ – but it would be good to have all events (AGGIE FOOTBALL)

Too many in the area already, maybe should localize one calendar

505 was not very interested in this, and don’t really see it as needed

They don’t need it, the information is out there and it is difficult to plan events around other organizations schedules no matter how you do it.

He liked it and thinks it’s a good thing

Good idea. The ACBV tried it with their affiliates and found it difficult. Whoever does it must be aggressive in learning about events and the events displayed must include nonprofit, business and academic activities.

Great idea if they can make one “clearinghouse”. May be difficult to do.

Make one major central calendar! There are too many already. Have to make too many calls to avoid conflicts. They may not want the BCF spending money on it. They thought the Chamber of Commerce would be a good candidate to do such a thing.

He sees it as a chamber of commerce role. There may be a need for such a calendar, but it is not necessary for the BCF to run it.

tried in past, you have to actually get people to report

this is a Chamber role – don’t waste resources duplicating services

ABSOLUTELY WOUNDERFUL! (she really liked this idea) – “we have to check like 10 places to plan an event- no way I can call every nonprofit in town to see what their schedule is”.

Helps with marketing. People want a place to go to find out what is going on and to avoid conflicting event times.

A GOOD IDEA- there is confusion about what events are going on in the same day. VERY beneficial.

Mediator:

No – They already have a trade organization that provides these services, but the BCF may be able to do it depending on their staffing and/or if they contract out the services

Someone has to do it. There is a dispute resolution center but it is more for divorces and other disputes.

He feels this is a very important role. Non duplication of services is very good. could be useful if a situation came up, but doesn't see it as imminent. There could be a benefit to something like this. They already have some mechanism in place for engaging with similar industry organizations.

Project Unity does this. It is about all of what they do, in fact. Orgs. here know their turf very well. NPOS are set up to hate each other because they are all going after the same \$. This is not healthy competition. This is OFF THE RECORD- no this would not work for the community foundation.

they are a funder- so not so much for them- but it would help people understand the Jr. League timeframe etc...

Already done by the Community Partnership Board

Great

The organization does not see this as needed in the community

It may be needed, but Mr. Hickman asked if this would be in line with the BCF's mission. If it is then it would be a good idea, but if not they could be jeopardizing their mission.

Great idea. Not sure how the BCF will be able to do it.

There is a lot of competition out there for limited resources, but there is even greater need. If two people are competing for one grant, the BCF could act as a mediator as such a need arose.

Especially if the two competing organizations were clients of the BCF, there are turf issues out there

Not a priority for them

Unsure if the BCF should do it. It may be difficult to be unbiased. "Let the funding public take care of this". The BCF may be better suited to assist/sponsor/distribute information about meetings and trainings, etc.

not really seen as needed

not really needed

maybe but use extreme caution – Brazos Valley Dispute Resolution Center already exists

not so much for the shelter- BUT – its an interesting idea.

Nice. "I don't think people will participate". Better to avoid controversy and conflict than to get in the middle.

Workshops and Trainings:

She has been trying something like this at Blinn College.

Yes – Very helpful for any size organization

These are important to do. Nonprofits need to hold themselves to standards.

This is probably always a need to have this here locally. There are many workshops offered through St. Joes. Capacity building would probably be a good area to focus on

United Way does some but they're not as consistent as needed

In their opinion this should be the #1 priority for the BCF on this list.

they didn't know if these would be useful, they would have to go and see what was offered they provide a good amount of training- but can never have enough- would be great.

This could possibly be helpful depending on what the workshop topics were.

The BCF should not be too burdened with this, but it is a good idea

Always a good thing as long as they are targeted and beneficial. They should be short, succinct, and to the point. Grant writing sessions for nonprofits would be good for the community.

Community Development Institute – Texas Division – has good leadership and community development programs that could be very beneficial to bring to the community. They could use some market studies in their organization

Great idea. Most groups in town do internal training, so it might be good. However some groups provide this service already.

Good. May nurture their employees to stay with the job. Possible workshop ideas – grant writing, and leadership

They would love it. Conferences are typically expensive to travel to.

1. Can the BCF bring in Attractive Speakers?
2. There are Hurdles with getting people to buy in
3. Were there a specific problem in the community, the BCF could be a rallying point

sounds great! Help with governance, start ups, management, efficiency, budgeting all needed in community

Sounds great! Always beneficial

“we would benefit from things like that” – and so would other nonprofits. Board members – some of them are new- all trainings for them are out of town – in town would be nice.

“Networking is always a good thing”.

Great*

Nonprofit Excellence Awards:

Yes – Chamber of Commerce has some awards, but not really focused towards nonprofits

United Way “silos” with their agency of the year and agency director of the year awards.

He feels it is not a bad idea but he does not rank it 1st in importance. It might help the community foundation’s visibility though.

They would really like to see the BCF take this role

YES!! need to be recognized just like other business. NPO’s need not be an after thought- they need to be looked at just like a business.

Great for PR

The organization felt this was a good idea

Some of this is addressed through United Way but it tends to focus on the United Way. If there were something broader it could be a positive thing

YES – but who gives them?

Recognize someone for their ability to manage

Recognize a Philanthropist in the community → this is a good idea for their mission

They think this would help a lot

Bringing recognition to such organizations is good because it would bring attention to lesser known or understood organizations

Great idea

Great idea. Dovetail it into the Newman 10 awards

One approach would be to recognize volunteers. The more you recognize what the community is doing, the more you will get what you want out of the community.

Would be good marketing. “Be ready to play politics though”. The Boys and Girls Club already has national standards to abide by, while others may not, thus giving the BGCBV an “edge”.

sounds great! Help with governance, start ups, management, efficiency, budgeting all needed in community

Sounds great! Always beneficial

People do not appreciate what you do (nonprofits). People just expect your services. So – Awards ...GOOD. Thank you cards are a big deal in the animal shelter office- would really inspire the community.

Great. Especially in areas that people would not normally think about...like marketing. People may see that and think of ways to improve their own skills like marketing.

Oversee the Use of National Standards for Local Nonprofits:

No real response

No – again they already have a trade organization to handle this.

Hospice is part of a highly regulated industry, so this is not for them. However, it might be good for other organizations.

yes, this is a good idea, perfect.

Could be beneficial, but they were not excited about it.

Useful only if it doesn't cause a lot of extra work for the organizations

They were a bit more reluctant on this one and wanted to know exactly what it would entail.

They thought it would be cumbersome if audits were involved. Felt that this was the job of the board of each organization.

joint effort

They think this would help a lot

This takes up a lot of time and could potentially become a liability. He didn't really like this one
Would better go under the workshops and training session. They would have like to have known certain legal issues when acquiring land and this would have been helpful.

There would probably be some pushback on this, but there is some desire in the nonprofit community to do this. If it was voluntary nonprofits could really benefit from this

No such thing as a national standard. Warns the BCF against becoming a watchdog group due to lack of credibility or history.

Would require huge effort to get everyone on the same basis. Could be done through the workshops and trainings

The organizations must be willing to comply and it may be difficult to get many to do so.

fears that it deviates too far from their mission

sounds great! Help with governance, start ups, management, efficiency, budgeting all needed in community

NO, sounds like licensing – giving the stamp of approval is not their role

Little rescue groups – they get started and get Nonprofit status, but sometimes are run in bad ways. It would be great if there were a place to call and see if these groups are meeting some kind of standards for management. That would put her organization one step closer to working with them. A REFERENCE source.

Anything that is going to add credibility is great.

Help Connecting to University Resources:

Great- they should be that link

Yes – very helpful due to the size of A&M

Liked the idea,

Yes, we have a lot of connections with the university, but it is probably an under utilized resource. It could provide nonprofits with information and direction.

YES, they should help with this

Don't know if it is an issue for established organizations, but it would help to know what other agencies are doing for referrals

YES

United Way is involved with StuAct board

Huge, untapped resource

Needs to be organized

Needs to be consistent

Hospice already does this. It could be helpful depending on the mission of the nonprofit seeking services.

YES- completely agree, most people on campus don't know what Jr. League is, Dental "health fair" example- they could not communicate with Spanish speaking clients- could have had professor or student groups come and help them.

Great idea*

They use them, but would like to see more access to the university. Currently there are interns from the university working at 505.

The University is still weak in this area, but has been doing better in recent years. Slowly they have become more accommodating to the community. Anything that can be done to couple with A&M should be done

A&M is an excellent university, and should do more in their own community. They have professors on their board – they find that there is resistance to involvement with the community because of theory vs. practice schools

BCF Role in this: loosening up the University to this idea, advocate, and refer organizations to points in the university

Splendid. There is a disconnect between the community and the university. Many organizations could benefit from such a connection. Smaller organizations could benefit from having students volunteer their time and energy to perform different tasks or assist on projects.

Some organizations might need. BVCAA can do fine on their own but this may be useful for startup organizations.

Already do a good job in many ways. The BGCBV works with the Sociology department a lot and professors often speak to the teenagers at the Club. Tami knows there are a lot of untapped resources at the University which she knows because she is working on her Master's and has access to some of these that other organizations do not yet.

this could be helpful in the community

1. Helping people realize the university as a resource
2. BCF could be a repository of funds for donating to agencies if organizations cannot give funds directly to them

They need a focused approach – This is what the BCF would be best at takes a lot of work

always welcome but not their priority

we already do it- architecture program helped with proposed new building. BUT – not every one knows about it.

“If the University is open to it there is no point in not doing it”.

Advocate for Policy Solutions:

Yea. Work with TANO and other state-wide organizations

No – Once again they have a trade organization for this

This could be problematic. This is not part of the job of nonprofits or the community foundation. Additionally, it could hurt the Community Foundation's ability to raise money.

Project Unity, United Way, the cities – maybe a separate board with 8-10 key players – a community effort

They do see this as a need. They were once concerned about cuts to the state budget that would affect them, and they went to Austin. It may have been better if they had a coalition of people to go in and address issues. Many cities pay for homeless shelters, but here an organization has

already been created to address the issue so the cities have not taken as active a role as they otherwise may have. Raising awareness would be good as well as at the state level.

we are so diverse- would be leery of this, - not so much common ground – would have to be very broad policy issues.

gotten away from this- (lobbying for policy) would want to be aware – we are diverse and don't want to cross that line.

Great

They don't need one: the Texas Disability Policy Consortium does this for them already.

Isn't sure that it fits with the BCF's mission, and wonders that they should stay away from this.

Strongly agree with this. The way legislating works is that if you are not out there making a lot of noise, you are over looked. This organization does a lot of this on their own, including spending time in DC every year.

Great idea if they can do it. He thinks they lack the credible experience and personnel power.

Plus, other organizations already do this.

Not a high priority on her list. Could be important for others. There is a need for help in the community but not necessarily the BVCAA. The Senior Administrator for Health Services does this for the BVCAA

The BCF must have the “pulse” on the community and know what is happening with their constituents.

not seen as the BCF's role

big job

NO – this is not their scope – this is what the COG does

Other shelters send staff to them for training – they are an example for the rest of the country for disaster response. **THEY ARE GOOD** and people know who they are.

Like the standards. Anything that will add credibility is good.

Nurture New Philanthropists:

Yes – More resources are always needed

No real response

Sure, this is always a good idea

Awesome

BCF should take the lead – federal dollars are getting cut

Yes. For long-term sustainability this will be important for nonprofit organizations. They could expose potential philanthropists through different nonprofits to see what these organizations are like and what they do. This would help them to understand the problems and what they can do to help.

He thought this was an excellent idea.

great / wonderful

Very important for them & they need to do this. This is probably the most important for the BCF to focus on because it is clearly in line with their mission.

Yes this is part of their mission, right? :

Absolutely; when one person stands up to make a difference in the community, people start to pay attention and want to get involved. There is a lot of money in the community and they could be contributing more. There are many good organizations to support right here at home as well as nationally

Not sure how they would do it. Believes there would be a conflict of interest between them asking for money to fund other organizations and themselves. Thinks they should stay away from it in the short run and should stick to planned giving, estates, etc.

She listed this as her most important priority

This should be the number 1 job for the BCF!

1. They will have to know local NPOs to be able to accomplish this
2. BCF could bring organizations together in the area to focus on what Health Care NPOs can't do alone
3. They could bring more sponsors in

Big Event at A&M – the whole idea is to get people used to doing things in the community; the BCF should promote and encourage such activities

The BCF could be a uniter in a single select cause.

absolutely! This is exactly their scope people ARE going to give. The Community foundation needs to make people aware of what kind of funds they run and how they are different from others. People do not understand the idea of CF “funds”.

Great. Helping people find where they want to give their money is perfect.

Other:

Be careful about not trying to be all things to all people – do a few things really well and be known for that

Represent the nonprofits they serve (those who have grants with the BCF)

The challenge is that everyone always talks about how generous the community is, but the city councils don't want to fund nonprofits – “if the community won't support you, why should we”

The need is out there but the way people here fundraise doesn't match – every week someone is putting on a huge event and spending a ton of money and not bringing in enough to serve the need – maybe there should be a few really great events each year run by the BCF that helps all the nonprofits

Important thing to remember is to gain confidence of the people who give by displaying quality management and board members and their ability

Bad press creates a sinking ship

Act like a bank – requires lots of trust

Board members need community reputation in order to promote the mission and encourage others to participate in the BCF

community is aware of the major nonprofits because we are SMALL. Need to keep the public aware – Its all about info and education, - Advertising is SOOO expensive. We want our name to come up when people type us in on Google.

The first three Roles were listed as the most important as well as the “Nurturing new philanthropists”. He hopes the BCF becomes a hub or clearinghouse for other nonprofits in the area. To give access to information or resources is desirable if the BCF can do it. Appreciates the mini-grant, it has really sparked a youth’s creativity.

The BCF must understand that they cannot be everything to everybody. It wouldn’t be good for them to do everything on the Leadership Roles list.

Thought we should visit with the McDougals and Ken Lokey from the board of directors. Also, we should look at who applied for the mini-grants to find other potential interviews or look for nonprofits outside of the B/CS area.

She is excited about what we are doing and wants to make sure she is invited to the Spring Forum.

Good Publicity: many organizations in the community have suffered from tarnished images due to national scandals. The community needs to see how money put into the nonprofit sector benefits the community. And he wants to eliminate the notion that nonprofits must be underpaid and overworked.

would like to learn about the community foundation as it is now.

- need for a round table / they focus on youth and children- it would be nice to yearly get together with other orgs that do this kind of work and see what s going on. – school districts, etc....

“ we rely on agencies coming to us- but many may not know (about us).”

WAGES FOR NONPROFITS- people need to be adequately compensated for their work. They are not.

It would be good to have a mechanism for having all organizations printed by a single place (ex: nonprofit news letter)

And the Resource center could possibly do this.

Umbrella idea – orgs. need to focus on their core mission – be a leader in your core business, not a grant chaser

What resources are available and how do you get to them?

He wanted to know “Why do we have a Community foundation and a United Way?”

She wanted to see how the BCF viewed their relationship with the United Way.

Appendix 6 – Community Foundation Email Responses

The Community Foundation of Calhoun County

Angela Banks, Director of Operations

Telephone: (256) 231-5160 Fax: (256) 231-5161

Board Size: 15

Number of FTE: 1 – 5

Total Revenue: \$1,865,821

Gross Receipts: \$7,148,143

We are a community foundation. Our assets come from various donor funds, which have a minimum contribution of \$10,000. Most of our gifts are deferred contributions arranged in various bequests and trusts. We were founded in 1999 and currently have \$25 million in assets with 85 separate donor funds. All of the funds pay the foundation an administrative fee depending on the services provided. Most annual fees range from 0.5 to 1.25%. This generates the assets for administrative costs. In addition many funds have components that foster many of the functions listed below. For example, we have a large healthcare fund that promotes advocacy. Unfortunately, our weakest area is in unrestricted assets (\$100,000). Our strategic goal is to progressively increase this amount to 50% of our assets. Another means that enhances our effectiveness is leveraging assets. Many of our grants are matched with community, donor or state funds. We also have a strong statewide association of foundations that actively takes policy positions and generates matching and supporting grants from national foundations. This primarily allows us to take on much larger issues far beyond our individual capacity.

Regarding your community leadership questions, we have the following:

A nonprofit resource center located in our office, this is a satellite office of the main office located in Birmingham, Alabama.

There is a local Retired Senior Volunteer Program in our community, which coordinates most of the volunteer services.

Our local chamber of commerce has a community calendar so we do not host this.

We do a great deal of convening around public needs or issues. Due to our small size we focus on one or two initiatives. Currently, we are engaged in a dialogue around the need for career education and technical training for high school students and under employed adults.

We manage a leadership and training academy for nonprofit organizations in collaboration with the nonprofit resource center. We conduct grant writing and research seminars, estate planning and financial literacy seminars.

We have one major award that recognizes the outstanding community volunteer of the year. It includes an engraved clock and the recipient's designation of \$1,000 to the nonprofit organization of their choice.

We comply with the national standards developed by the Council on Foundations; in addition we have local Core, Intermediate and Advanced standards for our grantees.

We do not offer a link to continuing education to our local two and four year institutions. We do collaborate with both in our grant making decisions and utilize them as a resource for our grantees.

We engage a great deal in public policy and advocacy. We are a member of our statewide poverty coalition; we also fund advocacy campaigns (tobacco, clean indoor air, pre-kindergarten, constitution reform, fair taxation and predatory lending).

Our entire development focus is to assist area residents of simple and significant means to make deferred gifts to the organizations and institutions that have served them in life or provide

valuable long-term services. Many families use the foundation to both give and to teach their children the value of giving.

Wayne Carmello-Harper

President/CEO

1000 Quintard Avenue, Suite 307

Post Office Box 1826

Anniston, Alabama 36202-1826

Voice: 256.231.5160, Ex. 25

Fax: 256.231.5161

Email: wcarhar@yourcommunityfirst.org

Website: www.yourcommunityfirst.org

Confirmed in compliance with National Standards for all U.S. Community Foundations.

Petoskey-Harbor Springs Area Community Foundation

Mrs. Maureen Nicholson, Executive Director

Telephone: (231) 348-5820 Fax: (231) 348-5883

Board Size: 15

Number of FTE: 1 – 5

Total Revenue: \$2,535,665

Gross Receipts: \$2,805,933

Attached I have provided some info you requested. The funding for most of the roles mentioned comes from our Unrestricted Endowment (aka the Community Endowment Fund). The Unrestricted Endowment provides us with the grant money we use during our two grant cycles each year and our current special initiatives. We are currently funding two special initiatives: Youth Substance Abuse, and Economic Development/Entrepreneurship.

Our funding comes primarily from individuals/families. We do also receive funding from other foundations and corporations.

Good luck completing your MPA.

DJ

David L. Jones

Program Officer

Petoskey-Harbor Springs Area Community Foundation

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Community Leadership Roles

- Nonprofit Resource Center – This center could provide information to nonprofits on potential funders, grant writing, and community resources. This type of center could also offer workshops, trainings, and consulting services.
- Volunteer Center- This center could be a central place for volunteer recruitment, assessment, and organization matching.
- Community Calendar – A community calendar would allow all Brazos Valley Nonprofits to inform the nonprofit community of their events and event dates. This would allow organizations to schedule events to maximize their impact and success.
- We do not “own” or run the calendar. But we encourage our Chamber of Commerce to maintain theirs and we urge area nonprofits to use it. We are somewhat of a resort community and every nonprofit tries to hold their event/fundraiser within a tight four month period in the summer.
- Mediator – Community foundations can act as a mediator between like minded but very different groups. This mediation conserves community resources by improving the productivity of nonprofits.
- Not so much a “mediator” as a convenor. We do have a nonprofit mediation organization in our community to which we have provided grants. But our convenor role is one of facilitation (or hiring a facilitator) to talk about important community issues.
- Workshops and Trainings – Would provide management, governance, and capacity building information and tools. Would also provide times to network with other area nonprofit organizations.
- Along with our neighboring community foundation, we have co-hosted an annual workshop on various topics for the area nonprofits.
- Nonprofit Excellence Awards – These awards would recognize excellent management and governance practices among Brazos Valley nonprofit organizations. They would also create awareness and publicity for winning organizations and their causes.
- Oversee the use of National Standards for local nonprofits – This would increase the quality of management practices among nonprofit organizations in the Brazos Valley. Best Practice Standards would give added credibility to all organizations that meet the standards.
- Help Connecting to University Resources – Texas A&M University can be a great asset and ally for your organization. Help would be given to connect with the University resources, such as experts or volunteers that would help your organization.
- Advocate for Policy Solutions- The Community foundation could help to broker regional solutions by cordoning efforts across multiple sectors. They could also help the

community to connect with government resources by advocating policy solutions to local nonprofit needs.

- Nurture New Philanthropists - Community foundations can identify donors' areas of interest and inform them of pertinent community needs.
- Donors who have established Donor Advised Funds here (large or small) are involved in our twice a year grant cycles. We send them summaries of the grant proposals we receive so they can learn about the community needs and hopefully pitch in some grant dollars during our grant cycles.

David L. Jones "DJ"
Program Officer
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Elk County Community Foundation
Board Size: Not Available (N/A)
Number of FTE: Not Available (N/A)
Total Revenue: \$772,365
Gross Receipts: \$772,365

We are still very new and have gone through some leadership role changes within the past two years. All though we would love to be a part of these types of actives you have listed, with only one, half time director and an 8 hour per week accounting assistant, time does not afford us this opportunity. Good luck in your research.

Paula Fritz Eddy
Executive Director
Elk County Community Foundation
111 Erie Ave, PO Box 934 Saint Marys, PA 15857
Phone: 814-834-2125 Fax 814-834-2126
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www.elkcountyfoundation.com

We make a living by what we get, we make a life by what we give.
---Winston Churchill

Ritchie County Community Foundation
(Affiliate of Parkersburg Area Community Foundation whose information follows)
Contact: Ms. Judy Sjostedt, Executive Director
Telephone: (304) 428-4438 Fax: (304) 428-1200
Board Size: 22
Number of FTE: 1 – 5

Total Revenue: \$3,173,394
Gross Receipts: \$3,173,394

This is our busiest season here (150 of our 300 funds are scholarships so apologies in advance but my response must be brief. I hope this is helpful.

Good luck!

Judy Sjostedt

Executive Director

1. All those that are highlighted, in some way, we presently support.
2. We serve as a funder for our local college's Foundation Center Cooperating Collection (not quite as elaborate as a nonprofit resource center but tries hard to be similar). We funded it in collaboration with two local private foundations.
3. We serve as a funder for our Center for Community Service Agencies (our Volunteer Action Center operates as a part of it; they have 20 or so nonprofits housed in one building that the CCSA/VAC (is same entity) runs). They share copiers, phone lines, a receptionist, conference facilities, etc. It is an excellent concept to help NPOs economize on their scarce administrative resources.
4. Our CCSA/VAC coordinates workshops and trainings for nonprofits in conjunction with our local college (West Virginia University at Parkersburg), our organization and local private foundations. We have funded some of the workshops; we've scholarshipped some participants and we've conducted them (as trainers for grantwriting, for example). Our funding sources are the college, ourselves and the local private foundations. On occasion, there is some corporate sponsorship.
5. Our constant role is nurturing of an ethic of philanthropy regionwide and we commit a staff person to that end, as well as significant portion of our own admin. resources.

Community Leadership Roles

- Nonprofit Resource Center – This center could provide information to nonprofits on potential funders, grant writing, and community resources. This type of center could also offer workshops, trainings, and consulting services.
- Volunteer Center- This center could be a central place for volunteer recruitment, assessment, and organization matching.
- Community Calendar – A community calendar would allow all Brazos Valley Nonprofits to inform the nonprofit community of their events and event dates. This would allow organizations to schedule events to maximize their impact and success.
- Mediator – Community foundations can act as a mediator between like minded but very different groups. This mediation conserves community resources by improving the productivity of nonprofits.
- Workshops and Trainings – Would provide management, governance, and capacity building information and tools. Would also provide times to network with other area nonprofit organizations.
- Nonprofit Excellence Awards – These awards would recognize excellent management and governance practices among Brazos Valley nonprofit organizations. They would also create awareness and publicity for winning organizations and their causes.
- Oversee the use of National Standards for local nonprofits – This would increase the quality of management practices among nonprofit organizations in the Brazos Valley. Best Practice Standards would give added credibility to all organizations that meet the standards.

- Help Connecting to University Resources – Texas A&M University can be a great asset and ally for your organization. Help would be given to connect with the University resources, such as experts or volunteers that would help your organization.
- Advocate for Policy Solutions- The Community foundation could help to broker regional solutions by cordoning efforts across multiple sectors. They could also help the community to connect with government resources by advocating policy solutions to local nonprofit needs.
- Nurture New Philanthropists - Community foundations can identify donors' areas of interest and inform them of pertinent community needs.

Wayne County Community Foundation

Board Size: N/A

Number of FTE: N/A

Total Revenue: \$5,377,401

Gross Receipts: \$5,382,260

Sounds like an interesting project...

In the community foundation world there are essentially four types: donor-centric, community-centric, supporting organization-centric, and combinations of the three.

A donor-centric foundation generally caters to the philanthropic intent of its donors and takes direction from them (or their appointees) for grant making.

A community-centric type generally evaluates community needs/goals and establishes community projects supported by fundraising efforts from existing and new donors. Grant making goes primarily toward the community project or goal.

A supporting group-centric type functions much more like a trustee to the supporting group and primarily supports the group's philanthropic mission.

A combination type offers services focused on several of the above types.

We are a relatively small foundation located between Columbus and Cleveland servicing a largely agricultural county of approximately 100,000 population.

We are a combination type (donor-centric and community centric) with assets in the \$40Million range. We comply to CF National Standards and have a staff of 2 (the exec dir and my admin assistant). See our downloadable Annual Report on our website.

A. Fundamentally we do three basic things; 1. acquire contributions and create funds 2. manage and invest the funds 3. award grants to support non-profit community activities/projects.

A-1. In the area of fund acquisition, we do not get any governmental support, but governmental affiliates have funds with us. We do not want to compete with our local charities, so we do not host any foundation fundraisers, but rather raise funds for the community projects. Generally, to support community projects (the building the Main Library, for example) we solicit grants from other foundations.

Please see page 21 in the AR for the types of gifts we receive and pages 13-20 for a partial listing of the funds we manage. We currently have 274

funds or which 78 are specifically for scholarships. We processed nearly 1,000 gifts last year.

Approximately 60% of our gifts come from specific donors that have established a named fund here; 10% toward memorials; and the balance from a host of donors that are contributing to specific community projects. See pages 35-40 in the AR.

A-2. Re: Investments: we are required to manage a diversified portfolio. See page 31 for our asset allocation model.

A-3. Grant Awards: We award grants in 8 focus areas (see page 22 for a two year history of this grant making). Last year we made over 620 awards. Since our inception in 1978, we have made grant awards of over \$36 million to the community.

B. In reference to your listing of Leadership Roles, we work very closely with 6 chambers of commerce, 4 local colleges/technical centers, 2 United Way agencies, several other family foundations, a host of local government agencies, schools, and churches, plus three key foundation trade associations. In this collaborative process, we have been actively involved in every one of your "leadership" roles except the below:

We support, but do not coordinate a community calendar which is done by several other community groups.

We belong to three trade associations who function as a Non-profit Resource Center for us. We do however facilitate classes on using the resources and grant writing.

We are not a Volunteer Center, but help market and support the many agencies in the community who are in need of volunteers.

C. Re: Nonprofit Excellence Awards: A new award established in the past 6 months honors the contributions that not-for-profit members of chambers of commerce make to the community. This has been well received.

D. A couple of other leadership roles you may want to add to your list are:

D-1. Youth Philanthropy and Community Volunteerism: These are youth funds and youth leadership programs designed to promote philanthropy and youth volunteerism.

D-2. Promotion and Marketing of Community Needs: Through web sites, links, newsletters, PSA's, speakers bureau, and donor based direct marketing techniques, community foundations can increase the awareness and support of specific community causes or agencies.

D-3. Leadership Steering Committees: many of our cities and towns offer year-long Leadership and economic development programs. I belong to the Steering committee of several of these to ensure that a new crop of community leaders is always in the making.

D-4. Interfaith Coordination: These are monthly inter-faith meetings for the clergy representing the 79 churches in the county. Most have similar missions and community foundations can help coordinate and unite many of them toward a common project.

D-5. Corporate Philanthropy Programs: These are aimed specifically at businesses and industries to reduce their internal corporate giving administrative burden, establish and manage charitable budget and cash flow guidelines, provide investment income and support charitable tax reduction strategies.

I hope this is helpful and I wish you the best on your project. Would love to have you e-mail me some of the other responses to your inquiry.

Ferenc M. Relle, Jr, Executive Director
Wayne County Community Foundation
517 North Market Street
Wooster, OH 44691
T: 330-262-3877
F: 330-262-8057
Cell: 330-749-5141

Beckley Area Foundation

Board Size: N/A

Number of FTE: N/A

Total Revenue: \$1,429,970

Gross Receipts: \$1,429,970

See below:

Community Leadership Roles

Nonprofit Resource Center – This center could provide information to nonprofits on potential funders, grant writing, and community resources. This type of center could also offer workshops, trainings, and consulting services.

Community foundations can help a broad base of nonprofits with such assistance even before there are significant grant dollars to be awarded.

Volunteer Center- This center could be a central place for volunteer recruitment, assessment, and organization matching.

In West Virginia, this function is provided by “Volunteer, West Virginia,” an initiative of the West Virginia Commission for National and community Service.

Community Calendar – A community calendar would allow all Brazos Valley Nonprofits to inform the nonprofit community of their events and event dates. This would allow organizations to schedule events to maximize their impact and success.

The local Chamber of Commerce provides this service.

Mediator – Community foundations can act as a mediator between like minded but very different groups. This mediation conserves community resources by improving the productivity of nonprofits.

Workshops and Trainings – Would provide management, governance, and capacity building information and tools. Would also provide times to network with other area nonprofit organizations.

Our community foundation has sponsored grant writing workshops, marketing workshops, board development workshops, scholarship workshops, and fund raising workshops. We have collaborated with several other non-profit organizations in presenting these events. In some instances participants paid a fee, sometimes the presenters donated their services, and sometimes our community foundation paid some or all of the cost. Funds were taken from our administrative money; our admin money comes from a designated administrative endowment fund and from the .5% admin fee we charge each endowment.

- Nonprofit Excellence Awards – These awards would recognize excellent management and governance practices among Brazos Valley nonprofit organizations. They would also create awareness and publicity for winning organizations and their causes.

We do not offer awards of this type, but we do utilize the WV governor's Service Awards and a number of other award programs which recognize individuals and organizations that have made significant contributions to our community.

Oversee the use of National Standards for local nonprofits – This would increase the quality of management practices among nonprofit organizations in the Brazos Valley. Best Practice Standards would give added credibility to all organizations that meet the standards.

Our community foundation has been recognized by the Council of Foundations as adhering to National Standards.

Help Connecting to University Resources – Texas A&M University can be a great asset and ally for your organization. Help would be given to connect with the University resources, such as experts or volunteers that would help your organization.

In our state, university and college foundations as well as private and community foundations, work together in the Leave a Legacy organization. There are many instances of collaboration.

Advocate for Policy Solutions- The Community foundation could help to broker regional solutions by cordoning efforts across multiple sectors. They could also help the community to connect with government resources by advocating policy solutions to local nonprofit needs.

Community foundations can take such proactive roles . . .although, realistically, a fledgling CR must first build significant assets, prove its effectiveness and its sustainability ,demonstrate good work, and establish itself as a collaborative partner within the community.

Nurture New Philanthropists - Community foundations can identify donors' areas of interest and inform them of pertinent community needs.

This is an obvious role of CFs. We also provide a means for people of lesser wealth to pool their resources and make a permanent difference in their community.

Our community foundation is 23 years old. For 10 years we operated with a volunteer board of directors and no paid staff.

Susan S. Landis
Executive Director
Beckley Area Foundation
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www.beckleyareafoundation.com
"Make a difference in the lives that follow"
BAF is a member of LEAVE A LEGACY

Greater Lewes Foundation
Board Size: N/A
Number of FTE: N/A
Total Revenue: \$837,924
Gross Receipts: \$837,924

We are a very small community foundation (Greater Lewes Foundation) in Delaware. We earn fees from local capital projects for which we serve as fiduciary, and solicit through an annual appeal to local (3,500) residents.

Our firm, Horizon, provides management services for the foundation.

Mike Rawl
Horizon Philanthropic Services
106 Shipcarpenter Street
Lewes, DE 19958
Tel. 302-644-0107
Fax 302-644-8856
www.horizonphilanthropic.com

Community Foundation of Greater Chattanooga, Inc
Contact: Mr. Peter T. Cooper, President
Telephone: (423) 265-0586 Fax: (423) 265-0587
Board Size: 24
Number of FTE: 6 - 10
Total Revenue: \$24,699,850
Gross Receipts: \$71,965,775

Our foundation works several ways to improve our community. While we may be best known as a funder (\$24 million in grants in 2007), I believe that our biggest impact is non-financial.

I spend approximately 40% of my time working with NPO boards or CEO's on issues. We typically work on board development and effectiveness, fundraising, planned giving, endowment building and management, CEO selection or transitions and similar topics. We frequently lecture at the

Center for Non Profits (UW supported), or local groups such as the AFP (Assoc of Fundraising Professionals) or Estate Planning Council.

We also spend significant amounts of time establishing relationships with donors and helping them achieve their charitable purposes.

We make capacity building grants at the staff discretion to help with npo strategic planning and similar efforts.

Now getting to your list. I think that #5 (Workshops and Training) is probably appropriate except that we do more one-on-one than large workshops. We find it more effective.

We nurture new philanthropists in many ways. We have significant penetration into the younger generations of the wealthy families in town. We also bring outside experts into town for small groups such as we did last week when we had a speaker on Transitions in Wealthy Families. The speaker was from Bank of New York/Mellon.

I guess the next to last thing I would say is that a community foundation can be a natural convener. Since we do not have a hidden agenda, we can bring lots of folks together to talk about issues as they arise. I am not sure if that fits any of your categories.

The last thing I will say is that the community foundation can set a tone for openness, transparency and communication in the community. Our website, publications, public meetings and one on one experiences all send the message that we can accomplish more together than separately. We must strive to communicate with all sectors of our community. We cannot afford to leave out the young or poor or any other sector of the community that lacks a strong voice. We can become their voice and give credibility to their issues.

So when you think about roles, think first about the underlying values upon which the foundation rests and then design roles that accomplish those values.

Best wishes on your work.

Pete Cooper

Peter T. Cooper
President
Community Foundation of Greater Chattanooga, Inc
1270 Market Street
Chattanooga, TN 37402
Phone 423.265.0586
Fax 423.265.0587

Berks County Community Foundation
Contact: Ms Franki Aitken, CFO

Telephone: (610) 685-2223 Fax: (610) 685-2240

Board Size: 25

Number of FTE: 6 – 10

Total Revenue: \$4,468,990

Gross Receipts: \$32,542,201

<<Community Leadership Sheet.doc>> Hope this is helpful.

Community Leadership Roles

- Nonprofit Resource Center – This center could provide information to nonprofits on potential funders, grant writing, and community resources. This type of center could also offer workshops, trainings, and consulting services.
- Volunteer Center- This center could be a central place for volunteer recruitment, assessment, and organization matching.
- Community Calendar – A community calendar would allow all Brazos Valley Nonprofits to inform the nonprofit community of their events and event dates. This would allow organizations to schedule events to maximize their impact and success.
- Mediator – Community foundations can act as a mediator between like minded but very different groups. This mediation conserves community resources by improving the productivity of nonprofits.
- **We do this by connecting and resolving disputes among various organizations. Funded by our own resources.**
- Workshops and Trainings – Would provide management, governance, and capacity building information and tools. Would also provide times to network with other area nonprofit organizations.
- **Occasionally do this and fund it from our own unrestricted resources. We have also charged a small fee for attendance.**
- Nonprofit Excellence Awards – These awards would recognize excellent management and governance practices among Brazos Valley nonprofit organizations. They would also create awareness and publicity for winning organizations and their causes.
- Oversee the use of National Standards for local nonprofits – This would increase the quality of management practices among nonprofit organizations in the Brazos Valley. Best Practice Standards would give added credibility to all organizations that meet the standards.
- Help Connecting to University Resources – Texas A&M University can be a great asset and ally for your organization. Help would be given to connect with the University resources, such as experts or volunteers that would help your organization.
- Advocate for Policy Solutions- The Community foundation could help to broker regional solutions by cordoning efforts across multiple sectors. They could also help the community

to connect with government resources by advocating policy solutions to local nonprofit needs.

- We work on policy advocacy both directly and through grant funding. We have received grants from private foundations (regional) to work on statewide policy work, primarily by coordinating other community philanthropy groups.
- Nurture New Philanthropists - Community foundations can identify donors' areas of interest and inform them of pertinent community needs.

This is constant work, but is funded through internal resources. We view this as part of our ongoing donor service function.

THE PHILADELPHIA FOUNDATION

Contact: Mr. Phil Arkow, Communications Officer

Telephone: (215) 563-6417 Fax: (215) 563-6882

Board Size: 18

Number of FTE: 21 – 100

Total Revenue: \$37,307,950

Gross Receipts: \$113,660,377

Please find our responses in the attached

Best,

R. Andrew Swinney, President

THE PHILADELPHIA FOUNDATION

THE POWER OF ENDLESS POSSIBILITIES

1234 Market Street, Suite 1800

Philadelphia, PA 19107

215-563-6417 ext. 111 - Fax 215-563-6882

www.philafound.org

aswinney@philafound.org

Community Leadership Roles

- Nonprofit Resource Center – This center could provide information to nonprofits on potential funders, grant writing, and community resources. This type of center could also offer workshops, trainings, and consulting services.

We are developing ourselves as a resource center in conjunction with our own discretionary grantmaking

- Volunteer Center- This center could be a central place for volunteer recruitment, assessment, and organization matching.

We do not get involved in volunteers

- Community Calendar – A community calendar would allow all Brazos Valley Nonprofits to inform the nonprofit community of their events and event dates. This would allow organizations to schedule events to maximize their impact and success.

We do not get involved in developing/managing a community calendar

- Mediator – Community foundations can act as a mediator between like minded but very different groups. This mediation conserves community resources by improving the productivity of nonprofits.

We convene groups but we do not mediate differences between groups

- Workshops and Trainings – Would provide management, governance, and capacity building information and tools. Would also provide times to network with other area nonprofit organizations.

We conduct workshops, trainings and other seminars for both our grantees and for our donors and their families through our Development Department and through our Grantmaking Services Department

- Nonprofit Excellence Awards – These awards would recognize excellent management and governance practices among Brazos Valley nonprofit organizations. They would also create awareness and publicity for winning organizations and their causes.

We periodically award Excellence awards to organizations

- Oversee the use of National Standards for local nonprofits – This would increase the quality of management practices among nonprofit organizations in the Brazos Valley. Best Practice Standards would give added credibility to all organizations that meet the standards.

No we do not get involved in this though we support the effort of a statewide organization that is handling this

- Help Connecting to University Resources – Texas A&M University can be a great asset and ally for your organization. Help would be given to connect with the University resources, such as experts or volunteers that would help your organization.

We do have one university out of 93 in this region that has a nonprofit center and we support their efforts. We also periodically converse with some of the other universities through the business schools and their social policy schools

- Advocate for Policy Solutions- The Community foundation could help to broker regional solutions by cordoning efforts across multiple sectors. They could also help the community to connect with government resources by advocating policy solutions to local nonprofit needs.

Periodically but not as a primary function

- Nurture New Philanthropists - Community foundations can identify donors' areas of interest and inform them of pertinent community needs.

Yes we do especially through a family philanthropy service we are developing

Iowa West Foundation
Board Size: N/A
Number of FTE: N/A
Total Revenue: \$29,915,254
Gross Receipts: \$365,602,781

Comments attached. Call if you need more. Best of luck. Important subject.

Reed Morgan
Grants Program Director
Iowa West Foundation
25 Main Place, Suite 550
Council Bluffs IA 51503
(712) 309-3007 voice
(712) 322-2267 fax
rmorgan@iowawest.com

Iowa West Foundation
Council Bluffs IA (metro-Omaha NE)
www.iowawestfoundation.org
contact: Reed Morgan, Grants Program Director
rmorgan@iowawest.com
(712) 309-3007

IWF has \$400 million assets, a \$23.5 million grants budget, & a \$2 million Admin budget. Iowa West Racing Assn (IWRA, est. 1984) built a dog track in the depths of the Farm Aid crisis. Riverboats arrived around 1989. IWRA “sponsors” two boats (a requirement of state law), for which IWRA currently receives \$8.8 million annually in contracted sponsorship fees; every penny is transferred to Iowa West Fdn (IWF, est. 1994) and granted into the community (to public charities and governments in 18 counties in SW Iowa and eastern NE). IWRA sold the track to Harrah’s, which generated a substantial IWF endowment. IWF awards grants from income earned on the endowment.

IWRA & IWF are independent entities and have no formal ties to gaming corporations.

Community Leadership Roles

- Nonprofit Resource Center – This center could provide information to nonprofits on potential funders, grant writing, and community resources. This type of center could also offer workshops, trainings, and consulting services.

Nonprofit Assn of the Midlands does some of this, and we have made small grants to NAM for various projects. IWF funded Council Bluffs Library to have Foundation Center On-Line grants-research capability and to build their management-related collection. My opinion: the Omaha metro area needs a more comprehensive management services organization (MSO) like the Texas network or the California Management Assistance Project (CMAP), honchoed by Compass Point in San Francisco.

- Volunteer Center- This center could be a central place for volunteer recruitment, assessment, and organization matching.

Ours is anemic, though we've funded it. Omaha does a better job.

- Community Calendar – A community calendar would allow all Brazos Valley Nonprofits to inform the nonprofit community of their events and event dates. This would allow organizations to schedule events to maximize their impact and success.

Much needed here. Omaha Community Foundation puts out a daily e-bulletin on nonprofit happenings.

- Mediator – Community foundations can act as a mediator between like minded but very different groups. This mediation conserves community resources by improving the productivity of nonprofits.

We “convene” and fund consultants to broaden debate and get people on the same page (various topics). For example, IWF funded 5 nonprofits to plan and build a \$30 million human services campus in 2005-2008 (Red Cross, Salvation Army, Boys & Girls Club, Family Service Assn, and a homeless family shelter), saving \$10 million through collaboration.

IWF is funding an economic development strategic planning effort for the City of Council Bluffs (there is none now) with substantial community input included.

IWF is funding Urban Land Institute to bring in 10 practitioners for a week to assess competing development opportunities (business and government want the IWF to subsidize lots of projects and we can't).

- Workshops and Trainings – Would provide management, governance, and capacity building information and tools. Would also provide times to network with other area nonprofit organizations.

IWF funded Endowment Readiness Workshops (Endowment Development Institute, www.Endowment.com) directly. We've supported other programs offered by others. It's spotty. The metro area could use a more systematic approach, like Nonprofit Mgt Solutions (npsolutions.org) in San Diego County CA.

- Nonprofit Excellence Awards – These awards would recognize excellent management and governance practices among Brazos Valley nonprofit organizations. They would also create awareness and publicity for winning organizations and their causes.

We have not funded these – though it’s a superb idea – but the Omaha Chamber of Commerce has such an award (for Omaha-based nonprofits).

- Oversee the use of National Standards for local nonprofits – This would increase the quality of management practices among nonprofit organizations in the Brazos Valley. Best Practice Standards would give added credibility to all organizations that meet the standards.

IWF funds best-practices research (through capacity-building grants) but we have not been asked to (or thought of) funding National Stds development per se.

- Help Connecting to University Resources – Texas A&M University can be a great asset and ally for your organization. Help would be given to connect with the University resources, such as experts or volunteers that would help your organization.

IWF hired Univ of Nebraska at Omaha to conduct our first independent community needs assessment and it was a very good experience. We’ll likely hire them again for other things.

- Advocate for Policy Solutions- The Community foundation could help to broker regional solutions by cordoning efforts across multiple sectors. They could also help the community to connect with government resources by advocating policy solutions to local nonprofit needs.

IWF has funded development of Downtown Design Guidelines, Public Art Master Plan, and a variety of community design workshops in small towns and in Council Bluffs. The City’s economic development study will lead to development of criteria for subsidizing developments based on land-use type, wage-levels, etc., something we lack now.

IWF has funded a Downtown Revitalization Fund to promote the adaptive reuse of vacant historic structures in historic downtown Council Bluffs.

- Nurture New Philanthropists - Community foundations can identify donors’ areas of interest and inform them of pertinent community needs.

IWF is providing \$6 million over six years to launch a Pottawattamie County Community Foundation, mostly for matching endowment gifts, but also for PCCF operations, capacity building, and re-granting.

The Denver Foundation

Contact: Mr. David Miller, President

Telephone: (303) 300-1790 Fax: (303) 300-6547

Board Size: 20

Number of FTE: 21 – 100
Total Revenue: \$142,003,090
Gross Receipts: \$142,003,090

From your list, the following are roles that The Denver Foundation plays:

- * Nonprofit Resource Center - Our website includes a list of consultants for nonprofits.
- * Mediator - We don't mediate, but we often convene groups of like-minded nonprofits to encourage more collaboration.
- * Workshops and Trainings - We occasionally offer these ourselves, and we also offer technical assistance grants for nonprofits.
- * Advocate for Policy Solutions- We do this a lot.
- * Nurture New Philanthropists - We do this a lot.

All of the above are funded by our grants budget and/or our administrative budget. Dollars for these two budgets come from our community endowment that has been built by thousands of generous donors since our founding in 1925.

I hope this is helpful.

David Miller, President
The Denver Foundation

Community Foundation of Sarasota County
Contact: Mr. Stewart Stearns, President & CEO
Telephone: (941) 955-3000 Fax: (941) 952-1951
Board Size: 24
Number of FTE: 11 – 20
Total Revenue: \$14,944,331
Gross Receipts: \$21,353,590

Attached is the list of those functions offered by our community foundation. Again, more information about all of these can be found at our website: www.cfsarasota.org.

Hope this helps.

Stewart W. Stearns
President & CEO
Community Foundation of Sarasota County
P.O. Box 49587
Sarasota, FL 34230-6587

Telephone: 941-556-7112
Fax: 941-556-7113

FOR GOOD. FOR EVER.

Community Leadership Roles
of the
Community Foundation of Sarasota County
Sarasota, Florida

Size: Approximately \$150 million
Stewart W. Stearns, President & CEO

- Nonprofit Resource Center – This center could provide information to nonprofits on potential funders, grant writing, and community resources. This type of center could also offer workshops, trainings, and consulting services.

Full information about our Nonprofit Resource Center is available on our website: www.cfsarasota.org. The program costs about \$400,000 per year. We generate about \$60,000 in direct fees and then use annual income from our Unrestricted Endowment Funds to cover the balance.

- Mediator – Community foundations can act as a mediator between like minded but very different groups. This mediation conserves community resources by improving the productivity of nonprofits.

This has been a major source of our program services for years. Right now, we have divided our board members into “focus teams” that examine data and identify high priority community needs in areas of interest natural to community foundations (arts, civic engagement, education, environment, health care, and human services). These groups then bring nonprofit organizations together to broker new services or reinforce natural partnerships that address those needs. The “carrot” for participation are fairly significant grants from our Unrestricted and Field of Interest Funds.

- Workshops and Trainings – Would provide management, governance, and capacity building information and tools. Would also provide times to network with other area nonprofit organizations.

Again, this is a part of our Nonprofit Resource Center. Information about course offerings and fees is available on line.

- Nonprofit Excellence Awards – These awards would recognize excellent management and governance practices among Brazos Valley nonprofit organizations. They would also create awareness and publicity for winning organizations and their causes.

I started a fund that bears my name that provides one non-cash award annually to a nonprofit executive that has exhibited leadership skills beyond the mission of their organization. The main criterion for getting the award is community collaboration and participation in community

projects beyond the scope of their daily duties. Again, the annual costs of a very unique award and recognition event are paid out of the Stewart Stearns Leadership Fund of the Community Foundation of Sarasota County. One day, I will be able to endow this award with a cash prize.

- Nurture New Philanthropists - Community foundations can identify donors' areas of interest and inform them of pertinent community needs.

This falls into the scope of our “focus team” process. In addition, as we learn of high priority community needs not being addressed by our focus teams, we take grantmaking opportunities to our donors that might have an interest in these projects. For example, because of the current economy, our food bank has not been able to deliver enough food to local faith-based and other distribution centers. The food bank needed \$90,000 for a new truck. We proactively went to our donors and raised that amount in less than a week.

| *St. Croix Valley Community Foundation*

Board Size: N/A

Number of FTE: N/A

Total Revenue: \$6,528,807

| Gross Receipts: \$7,459,079

We, as most community foundations, receive funds from individuals, families and nonprofit organizations who wish to establish a fund with us. Now and then we receive grants from state government, for example, we have been receiving funds recently from the Wisconsin Arts Council to make grants to arts organizations in our region. But we do not receive government funds for our operations. Operations are funded solely by the fees we charge on the funds we administer. Please check out our website at www.scvcf.org.

Community Leadership Roles

- Nonprofit Resource Center – This center could provide information to nonprofits on potential funders, grant writing, and community resources. This type of center could also offer workshops, trainings, and consulting services. **YES**
- Volunteer Center- This center could be a central place for volunteer recruitment, assessment, and organization matching. **NO**
- Community Calendar – A community calendar would allow all Brazos Valley Nonprofits to inform the nonprofit community of their events and event dates. This would allow organizations to schedule events to maximize their impact and success. **NO**
- Mediator – Community foundations can act as a mediator between like minded but very different groups. This mediation conserves community resources by improving the productivity of nonprofits. **YES**
- Workshops and Trainings – Would provide management, governance, and capacity building information and tools. Would also provide times to network with other area nonprofit organizations. **YES**

- Nonprofit Excellence Awards – These awards would recognize excellent management and governance practices among Brazos Valley nonprofit organizations. They would also create awareness and publicity for winning organizations and their causes. **NO**
- Oversee the use of National Standards for local nonprofits – This would increase the quality of management practices among nonprofit organizations in the Brazos Valley. Best Practice Standards would give added credibility to all organizations that meet the standards. **NO. DO SUCH STANDARDS EXIST FOR NONPROFITS? THEY DO FOR COMMUNITY FOUNDATIONS, AND WE MEET THOSE STANDARDS.**
- Help Connecting to University Resources – Texas A&M University can be a great asset and ally for your organization. Help would be given to connect with the University resources, such as experts or volunteers that would help your organization. **NO**
- Advocate for Policy Solutions- The Community foundation could help to broker regional solutions by cordoning efforts across multiple sectors. They could also help the community to connect with government resources by advocating policy solutions to local nonprofit needs. **NOT YET**
- Nurture New Philanthropists - Community foundations can identify donors' areas of interest and inform them of pertinent community needs. **ABSOLUTELY**

Jane Hetland Stevenson
 President
 St. Croix Valley Community Foundation
 516 Second St.
 Hudson, WI 54016
 715-386-9490
www.scvcf.org

Initiative Foundation

Board Size: N/A
 Number of FTE: N/A
 Total Revenue: \$6,542,543
 Gross Receipts: \$19,734,949

I'm going to send off a quick reply that I hope is helpful for your project. It appears that your core question is how various activities are funded, so I'm responding from that perspective. Please visit our website for more info on the Initiative Foundation: www.ifound.org We are one of six regional foundations in Minnesota that do not fit the mold of a traditional foundation. In addition to typical activities, we operate programs, make business loans (with special IRS authorization), and do extensive capacity building of other organizations through training and assistance.

Good luck with your project.

Kathy

- * Nonprofit Resource Center - This center could provide information to nonprofits on

potential funders, grant writing, and community resources. This type of center could also offer workshops, trainings, and consulting services.

Through our Healthy Organizations Partnership program (see website) we do all of this and more. The HOP program is funded primarily by grants from other larger private foundations as well as contracts for service.

* Volunteer Center- This center could be a central place for volunteer recruitment, assessment, and organization matching.

We administer the VISTA program for our area, which is federally funded.

* Community Calendar - A community calendar would allow all Brazos Valley Nonprofits to inform the nonprofit community of their events and event dates. This would allow organizations to schedule events to maximize their impact and success.

We do not keep a calendar. Local United Ways, chambers and another community foundation do this for our area.

* Mediator - Community foundations can act as a mediator between like minded but very different groups. This mediation conserves community resources by improving the productivity of nonprofits.

We are called to do this on occasion. We tend to absorb these costs through our program budgets.

* Workshops and Trainings - Would provide management, governance, and capacity building information and tools. Would also provide times to network with other area nonprofit organizations.

We do a lot of workshops and training, again through our various programs. See website: Healthy Organizations, Healthy Lakes and Rivers, Healthy Communities, Early Childhood Initiative, Meth Initiative, etc.

* Nonprofit Excellence Awards - These awards would recognize excellent management and governance practices among Brazos Valley nonprofit organizations. They would also create awareness and publicity for winning organizations and their causes.

WE do a huge awards event every 18 months that honors a nonprofit, a youth, an environmental organization, a business, a volunteer and a community. We pay for this through event sponsorships.

* Oversee the use of National Standards for local nonprofits - This would increase the quality of management practices among nonprofit organizations in the Brazos Valley. Best Practice Standards would give added credibility to all organizations that meet the standards.

Through our HOP program we provide training on national and state standards, but we do not "police" this. You might want to look at the Charities Review Council for Minnesota. They

have an excellent measure/system.

* Help Connecting to University Resources - Texas A&M University can be a great asset and ally for your organization. Help would be given to connect with the University resources, such as experts or volunteers that would help your organization.

In our economic development work we partner frequently with our post secondary institutions around specific work force and business development efforts. They are typically grant funded or covered through private business donations.

* Advocate for Policy Solutions- The Community foundation could help to broker regional solutions by cordoning efforts across multiple sectors. They could also help the community to connect with government resources by advocating policy solutions to local nonprofit needs.

Since our early childhood initiative is a statewide project, our advocacy work is most developed in that area, thanks to a partner that focuses on this: REady4K.org

* Nurture New Philanthropists - Community foundations can identify donors' areas of interest and inform them of pertinent community needs.

We offer a range of donor services, are researching the transfer of wealth data and thinking of new ways to engage the next generation of philanthropists. AT every turn we try to link this to programs, but much of our donor services expense is covered by general operating funds which come from endowment earnings and grants.

Kathy Gaalswyk, President
Initiative Foundation
405 First St. SE
Little Falls, MN 56345
320-632-9255 Office
320-631-2005 Direct
320-632-9258 Fax
www.ifound.org

San Antonio Area Foundation
Contact: Mrs. Michelle Cox, Controller
Telephone: (210) 225-2243 Fax: (210) 225-1980
Board Size: 15
Number of FTE: 11 – 20
Total Revenue: \$28,929,064
Gross Receipts: \$28,929,064

Please see the attached document for the San Antonio Area Foundation's responses to the project question. Feel free to contact me should you have any questions concerning our responses.

Best regards,
Nancy Y. Ayon
Research Associate

San Antonio Area Foundation
 110 Broadway St., Ste. 230
 San Antonio, TX 78205
 210-225-2243 main line
 210-242-4721 direct line
 210-225-1980 fax
<http://www.saafdn.org>

COMMUNITY LEADERSHIP ROLES

ROLES	SAN ANTONIO AREA FOUNDATION
<p>Nonprofit Resource Center – This center could provide information to nonprofits on potential funders, grant writing, and community resources. This type of center could also offer workshops, trainings, and consulting services.</p>	<p>Currently are not. The Nonprofit Resource Center (a standalone nonprofit) and UT-San Antonio’s Nonprofit Management Program fill this role.</p>
<p>Volunteer Center- This center could be a central place for volunteer recruitment, assessment, and organization matching.</p>	<p>Currently are not working to fill this role in the community we serve. The United Way of San Antonio and Bexar County fill this role in our community.</p>
<p>Community Calendar – A community calendar would allow all Brazos Valley Nonprofits to inform the nonprofit community of their events and event dates. This would allow organizations to schedule events to maximize their impact and success.</p>	<p>Currently are not working to fill this role in the community we serve.</p>
<p>Mediator – Community foundations can act as a mediator between like minded but very different groups. This mediation conserves community resources by improving the productivity of nonprofits.</p>	<p>We have two community initiatives – (TRIAD-Texas Resources for Iraq-Afghanistan Deployment (see http://www.triadfund.org) and Animal Initiatives (see www.ownupsa.com)). In both, we have played an active role in convening different funders and nonprofits related to the above issues. Funding for TRIAD was obtained through an anonymous donor from the California Community Foundation (CCF). CCF approached us with the proposal to partner with two other community foundations in Texas to work on TRIAD. Funding for the Animal Initiative was obtained through the bequest of a San Antonio Area Foundation donor.</p>
<p>Workshops and Trainings – Would provide management, governance, and capacity building information and tools. Would also provide times to network with other area nonprofit organizations.</p>	<p>Currently provide workshops and training for our annual competitive grants process to assist nonprofits with completing the application. The Nonprofit Resource Center and UT-San Antonio’s Nonprofit Management Program currently fill this role.</p>

<p>Nonprofit Excellence Awards – These awards would recognize excellent management and governance practices among Brazos Valley nonprofit organizations. They would also create awareness and publicity for winning organizations and their causes.</p>	<p>Currently are not working to fill this role in the community we serve.</p>
<p>Oversee the use of National Standards for local nonprofits – This would increase the quality of management practices among nonprofit organizations in the Brazos Valley. Best Practice Standards would give added credibility to all organizations that meet the standards.</p>	<p>Currently are not working to fill this role in the community we serve.</p>
<p>Help Connecting to University Resources – Texas A&M University can be a great asset and ally for your organization. Help would be given to connect with the University resources, such as experts or volunteers that would help your organization.</p>	<p>Currently are not working to fill this role in the community we serve. However, most of our interns (and some employees) have been students or alumni from UT-San Antonio. We also look to the UT-San Antonio for volunteers and foundation-led research.</p>
<p>Advocate for Policy Solutions- The Community foundation could help to broker regional solutions by coordinating efforts across multiple sectors. They could also help the community to connect with government resources by advocating policy solutions to local nonprofit needs.</p>	<p>Currently are not working to fill this role in the community we serve.</p>
<p>Nurture New Philanthropists - Community foundations can identify donors’ areas of interest and inform them of pertinent community needs.</p>	<p>Are currently working on evaluating our current and prospective donor base, as well as foresee conducting a community needs assessment to better serve our community and assist our donors in maximizing their impact as they wish to do so. We also have a program, Partners in Philanthropy, which provides donors with similar interests to provide funding for unfunded grant requests that came through our annual competitive process. We also have three community outreach funds (South Texas Hispanic Fund, African-American Fund, and the Women’ Fund) to diversify the donor base and initiate philanthropic learning and involvement among these sectors.</p>

Appendix 7 – Fall Workshop

In October 2007, the Bush School, United Way, and BCF sponsored an all-day workshop focusing on the Standards of Excellence for Nonprofits and the National Nonprofit Congress. The presenters were Rose Mary Fry of the Texas Nonprofit Network and Dr. Angela Bies of the Bush School. Electronic invitations were sent to local nonprofit staff members, volunteers, and board members. Potential attendees were identified by the Capstone through a web search for local nonprofit organizations.

Fall Workshop Agenda

Nonprofit Town Hall and Workshop

Friday, October 12th, 2007

Center for Regional Services, 3991 South 29th Street, Bryan, Texas

9:00 a.m. - 12:00 a.m. Town Hall Meeting

12:00 p.m. - 1:00 p.m. Lunch provided

1:00 p.m. - 4:00 p.m. Standards for Excellence Introductory Workshop

Standards for Excellence Introductory Workshop

The morning session provided a review the Maryland Standards for Excellence Program. This workshop provided an overview of the nationally recognized Standards for Excellence program and practical guidance to strengthen nonprofit organizations. The tool provides management advice and performance benchmarks in each of the eight areas. Visit <http://www.standardsforexcellence.org/> for more information.

9:00 a.m. Welcome & Opening Remarks

9:05 a.m. Introduction of Table Participants - Gathering of Organization Statistics

9:15 a.m. Background & Priorities from the 2006 Nonprofit Congress Three Priorities

- Public Support & Awareness of the Sector
- Organizational Effectiveness with an Emphasis on Leadership and Accountability
- Advocacy

Update on Texas Activities

- Follow-up Meetings with Participants & Executive Directors
- Standards for Excellence Pilot Project

9:30 a.m. Actions by Your Nonprofit on the Three Priorities

10:00 a.m. Ways to Move Work Forward on the Three Priorities in Texas

10:30 a.m. Successful Community Collaborations

- Opportunities & Challenges

11:00 a.m. Issues to Share with Presidential Candidates

11:30 a.m. Summary & Next Steps

Town Hall Meeting

The afternoon session was structured as a Town Hall Meeting to discuss three pressing issues for the nonprofit sector: 1) Public Support and Awareness of the Sector, 2) Organizational Effectiveness and 3) Advocacy. Participants learned about this national initiative to strengthen the nonprofit sector and will help develop an agenda for issues relevant to the Brazos Valley. This town hall was developed by the Nonprofit Congress, which is an effort to unite and strengthen the nonprofit community (<http://www.nonprofitcongress.org/>).

Fall Workshop Notes

Values and Guiding Principles from the Nonprofit Congress

- Dedication to the betterment of the communities we serve
- Commitment to serve others
- Catalyst for change and innovation
- Operate with ethics and integrity

Song Titles – 2007 Nonprofit Sector

- One is the Loneliest Number
- Money
- Eye of the Tiger
- Lack of Wind Beneath Our Wings
- Amazing Grace

Three Top Priorities: Public Awareness and Support of the Nonprofit Sector, Organizational Effectiveness with an Emphasis on Leadership and Accountability and Best Practices, Advocacy and Grassroots Community Activities

1) What are your individual organizations doing in relation to these three priorities?

Public Awareness and Support of the Nonprofit Sector

- Hired a director of marketing and development
- Use of websites
- Community outreach
- More monies for advertising budget
- Different speaking engagements
- Addition of marketing line in the budget
- Visibility of numbers and clients served to the public
- Press releases and newspaper articles
- Newsletters for boards/walking billboards
- United Way rallies/work of individual agency programs
- Building infrastructure first
- Signs for the organization
- Showing a picture of client served

- Getting involved in the community, service organization, and Leadership programs

Public Awareness and Support of the Nonprofit Sector continued...

- People served in the local community
- Hosting more events, visibility
- Dollar value/savings to the community
- Empowering board and staff and volunteers to speak on your behalf

Organizational Effectiveness with Emphasis on Leadership, Accountability, and Best Practices

- Annual Reports
- Board development about the agency's work
- Hiring employees as a good fit for our organization
- Organization/adding staff, built in flexibility for positions
- New employee training
- Diversity of the board
- Select and train volunteers
- Participation in community events about the sector
- Hiring outside organization to measure effectiveness
- Screening of volunteers
- Education of employees to talk with clients about other needs
- Policies and procedures manual
- Strategic plan
- Follow-through on work commitments
- Form 990 posted on the website
- Budget line item for professional development

Advocacy and Grassroots Community Activities

- Exhibit booth at appropriate events
- Visibility through events
- Build individual relationships
- Alliance with hospices within Texas
- Network with other nonprofits
- Calling on elected officials
- Fact Sheet
- Wallet Version of a Fact Sheet

2) What work could be done in Texas on Top Three Priorities?

Public Awareness and Support of the Nonprofit Sector

- One Voice for the sector
- Texas Association of Nonprofit Organizations
- Other umbrella organizations
- Registry for Texas nonprofits
- 211 Role
- Elected officials to read to children in a partnership project
- Build relationships at state and national level

- Information research/assessments/region, communication to a broader public

Public Awareness and Support of the Nonprofit Sector continued...

- Additional public recognition
- Economic impact of nonprofit sector
- Proud of nonprofit role in the community
- Think of self as a state industry
- Reminders to nonprofit colleagues with best business practices

Organizational Effectiveness with Emphasis on Leadership, Accountability, and Best Practices

- Increased communication to decrease duplication of services
- Annual registration
- Sharing with nonprofit organizations successes and challenges
- Joint purchasing
- Consistent accreditation for nonprofits
- Encourage succession planning
- Board diversity and participations
- Ask for help
- Affordable training

Advocacy and Grassroots Community Activities

- More collaborations
- Don't be scared to give up your power and influence
- Partnering with universities
- Statewide nonprofit meeting
- Be proactive and move forward
- Calling on legislators
- Working with state or national organizations
- Sensitivity to other issues
- Attending community events to build relationships with other organizations
- Nonprofit Lobbying Day

3) What are Successful Collaborations in Bryan College Station?

- Caregivers Conferences
- Partnering with the University, Dept. of Education/big events/literacy
- Department of Student Services and AggieServe
- 211
- Community Partnership Board
- Community of Promise Board
- Impact Committees/United Way
- Brazos Valley Health Partnership
- Brazos Valley CDC and Housing
- Affiliation with the COG
- Arts Council
- Domestic Violence Coalition

4) What are assets of a successful collaboration?

- Sharing the same goals and roles
- Individual organizational agendas are set aside
- Serving different needs of the same clients
- Structured in their interactions
- Sharing of resources
- Leadership
- Right team members
- Honest with partners
- Trust
- Consistent participation
- Bring together diverse perspectives

5) What are barriers to successful collaborations?

- Personal agendas
- Competition for resources, funding, and time
- History of the organization
- Thinking with hearts but without business sense
- Band Aid: short-term rather than long-term
- Loss of discretion
- Abuse of good will
- Leadership of various organizations do not reward collaboration
- Lack of communication for whatever reason
- Lack of responsiveness to the constituent needs
- Expecting a payback
- Not doing proper research
- Too many Chiefs

6) How could nonprofit service providers help increase collaboration skills?

- Mediation
- How to listen
- Proper planning
- Project management
- Needs assessment
- Long-range vision
- Strategic planning
- Resource development
- Outside facilitator not involved in the collaborative
- Collaborative leadership
- How to let go
- When to close down the collaboration
- How to say no

7) What are issues to present to the presidential candidates?

- Greater knowledge of types of nonprofits
- Be aware of the language of nonprofits
- Realize local effects of national decisions
- Local contributions on national issues
- Nonprofits can intervene and impact of work
- Incentives for working for nonprofits
- Government funding should fund operational budgets
- HR and IT staff
- IRS tax structure – proactive in improving the system
- Restrictions placed on funds
- Look at government fees as fee for service rather than donation
- Level the playing field in influencing the political process
- Standard accreditation process
- Mandatory public service for all citizens
- Cabinet level position for nonprofits
- Individual tax credit for volunteer hours
- Illustrate percentage value of nonprofit contributions to the community
- Creation of incentives for nonprofit employees
- Create research institution for nonprofit issues
- Real domestic agenda for social issues
- Stop unfunded mandates

Fall Workshop Follow-up Survey

Capstone members distributed a survey to the workshop attendees to help gauge the success of the event, as well as to help determine who to focus on for interviews. The survey also helped identify areas where additional workshops would be helpful.

Appendix 8 – Spring Forum

In April 2008, the Capstone coordinated a spring nonprofit forum to provide training and to bring awareness of the BCF to the local nonprofit community. The forum included five workshop sessions, a lunch, a keynote speaker, and a panel session with the Capstone to present the final report and receive feedback. PowerPoint slides, handouts, and other information provided by workshop participants was provided to each attendee on a CD-ROM included in the registration packet.

Spring Forum Agenda

8:15-9am – Check-in

9am – Welcome

9:15am – Steve Moore

9:45am – Break

10:00-11:15 am – Workshop 1

 Session 1a – Local Funding Panel

 Session 1b – The Board’s role in developing a vision, Dr. Will Brown

11:30am – Lunch

11:45am – Dr. Elsa Murano

12:15-1:00 pm – Keynote speaker Dr. Alan Andreasen

1:15-2:15pm – Workshop 2

 Session 2a – Accountability for Success, Dr. Deborah Kerr

 Session 2b – Local Event Planning Panel

2:15-2:30pm – Break

2:30-3:30pm – Workshop 3 – Marketing your Vision, Dr. Alan Andreasen

3:30-4:30pm – Capstone presentation

Appendix 9 – Texas A&M University Interviews

Dr. Bies, Bush School Professor

Smaller communities have special needs and challenges. The Community Foundation issue overlaps with general capacity building issues within the community. It overlaps more, or it will be bigger where there are no community foundations or a present community foundation is newer. Where there is a void in community capacity building, community foundations are the logical choice to fill that role. Organizations like the United Way have a bit of a barrier as to who they serve and what their mission is in trying to fill this role. There is a “magic mix” when the community has a need for capacity building and a community foundation is growing and searching out its role; the Brazos Valley is currently in this stage.

Community foundations exist to raise money and to protect and help it grow to help local nonprofits fulfill their missions. They play a democratic role as well as a capacity building and service role for donors. They are brokers, champions for the nonprofit sector, and capacity builders. Community foundations also have an explicit role of building permanently restricted net assets to redistribute to nonprofits.

The BCF should fill the void here in capacity building, but should not stretch themselves too thin. For example, this community is missing a nonprofit attorney or accountant. The BCF should fill nonprofit service gaps by either providing the services themselves or funding the nonprofit to get the services themselves.

First and foremost, the BCF needs to attend to its own growth and bring nonprofits on board. The stronger they are as a being a broker and the more consistently local nonprofits understand that, they will better able to perform other functions. Secondly, all of these things are needed in the community; the issue is in what order and who and should be the primary players to what degree. The BCF cannot be all things.

Nonprofit resource center

Not enough volume or scope in the community yet to do this. If nonprofits say they need things like accountants and attorneys, the BCF can help provide these services.

Excellence awards

This is an opportunity for the BCF to recognize nonprofits and bring them to the public eye as well as to partner with the United Way and the Bush School and have an annual training conference with trainings that climaxes with awards for managers and organizations as well as awards for a business or individual philanthropists. A committee made up of various community members should pick the winners. The Nonprofit Forum the Capstone is putting on would be the best place to start this.

University Resources

They should be thinking more broadly than A&M and include executives, retirees, and consultants. RSVP and some student initiatives already do some of this, but there is a void to some degree.

Community Calendar

Someone should be doing this; the question is at what cost. This sounds logistically difficult for a small staff.

Mediation and advocacy

The BCF could hold a monthly roundtable for nonprofit executives to discuss advocacy and common interests in concert with the United Way and the Arts Council. When you are a funder, you have multiple stakeholders and the nonprofit sector will not see everything in concert. Some people will see the roundtable in conflict with their role of funder; at the same time, nonprofits need to educate the public and lawmakers on their issues.

Dr. Robinson, Bush School Professor

The nonprofit resource center is a particularly good idea; this type of center could be a hub with which the other roles could eventually be put together (volunteer center, mediator, awards, oversight, etc.). The BCF could start with this nonprofit resource center and then go into the other roles. Any efforts to empower local nonprofits to seek independent funding would be a positive step. This would be both efficient and effective. A resource center would employ economies of scale and could provide information to nonprofits at a low cost; the more you centralize the support function the better and more effective and efficient it will be. The resource center could provide a newsletter that raises awareness about eligibility for funding and other opportunities.

The BCF could help to professionalize the nonprofit field by introducing patterns of problem solving and effective thinking. One idea is to form a community knowledge base; have nonprofits report how their project went after they are completed. This could be made into a Wikipedia style body of knowledge that other nonprofits could refer to when they are thinking of doing similar projects. This type of thing could be simple and possibly mandatory for the acceptance of a grant or other sources of funding.

A grant proposal for this type of project could include:

- Oversight (assessments etc.)
- Free software
- Hosting (could find cost sharing, or could get for free because it would require such a low band width.)
- Hosting companies could get this kind of thing as a tax write off.

Building a pool of money is good, but it is not the most efficient way of raising funds and support for organizations.

- Use the resource center to get large grants to be broken up among many nonprofits (this makes it worth the effort to apply for the grants) Get community block grant funding to possibly do this
- Build capacity to allow nonprofits to seek funding on their own. It is inefficient to write their own \$500 grant for a small project- get them to start looking at the bigger picture – seeking funding for 10 phases (\$500 each)- you save time, resources, and you are forced to look ahead when this is done.

Dr. Bresciani, VP of Student Affairs, Texas A&M University

There needs to be more outreach by nonprofits. TAMU can't promote specific causes because it is a state agency.

Connect with faculty – Dr. Luis Cifuentes – Vice Provost or Dean of Faculties

NO JUNK MAIL

Find the way to get their attending

Get them to integrate local service as a class requirement

Nonprofit Resource Center example: University of North Carolina, Chappell Hill – Center for Public/Community Service

Self-regulating database

Virtual reference center

Link from StuAct

The biggest concerns with a nonprofit resource center are who will fund it, where will it be located, and who will coordinate it? Money is tight for everyone.

Dr. Karen Watson, Dean of Faculties

A&M is not a nonprofit outreach institute. Professors can not be required to donate time to the local community; they already have full-time jobs. If A&M is going to have a partnership with the local community that partnership needs to be defined; resources have to come to A&M too and it needs to be a reciprocated relationship. Things like Big event are great examples of how A&M is already working with the community; it is a tremendous thing for A&M to fund salaries for this activity. Nonprofits should approach the university just like they approach other organizations to enlist assistance.

Service-learning

People in Student Affairs promote learning-service. There are classes where service-learning makes sense like projects courses & capstone projects, and others where it doesn't. It is difficult to gauge whether or not student and professor interests will be consistent from one year to the next, so A&M cannot guarantee opportunities. Where nonprofit needs exist, the university is always willing to help as much as they can. However, nonprofits needs to make an effort to connect with the university as well.

If the university was to establish a partnership with any organization, it would be seen as an endorsement, and A&M cannot do that. Even student consulting projects are seen as unfair competition by private companies, which is controversial considering the university is funded with state resources. The best places for outreach opportunities are within the offices of each Dean.

Dr. John Crompton, RPTS Professor

It is a seemingly difficult task for nonprofits to contact A&M for help. However, this should not be centralized because it would just be added bureaucracy. Nonprofits would be better off creating networks with university departments.

Porter S. Garner, The Association of Former Students

The Association is an independent nonprofit organization, and doesn't legally partner directly with the university. There is not as much of opportunity for the Association to connect with local nonprofits as there could be for the university. The nonprofit community needs to figure out how to leverage university resources, particularly students. There should be some linkages between some colleges that represent what students want to do for a living for career enhancing opportunities.

The nonprofit community needs to create more awareness of the needs and opportunities. The BCF may be the group that communicates these needs to the university.