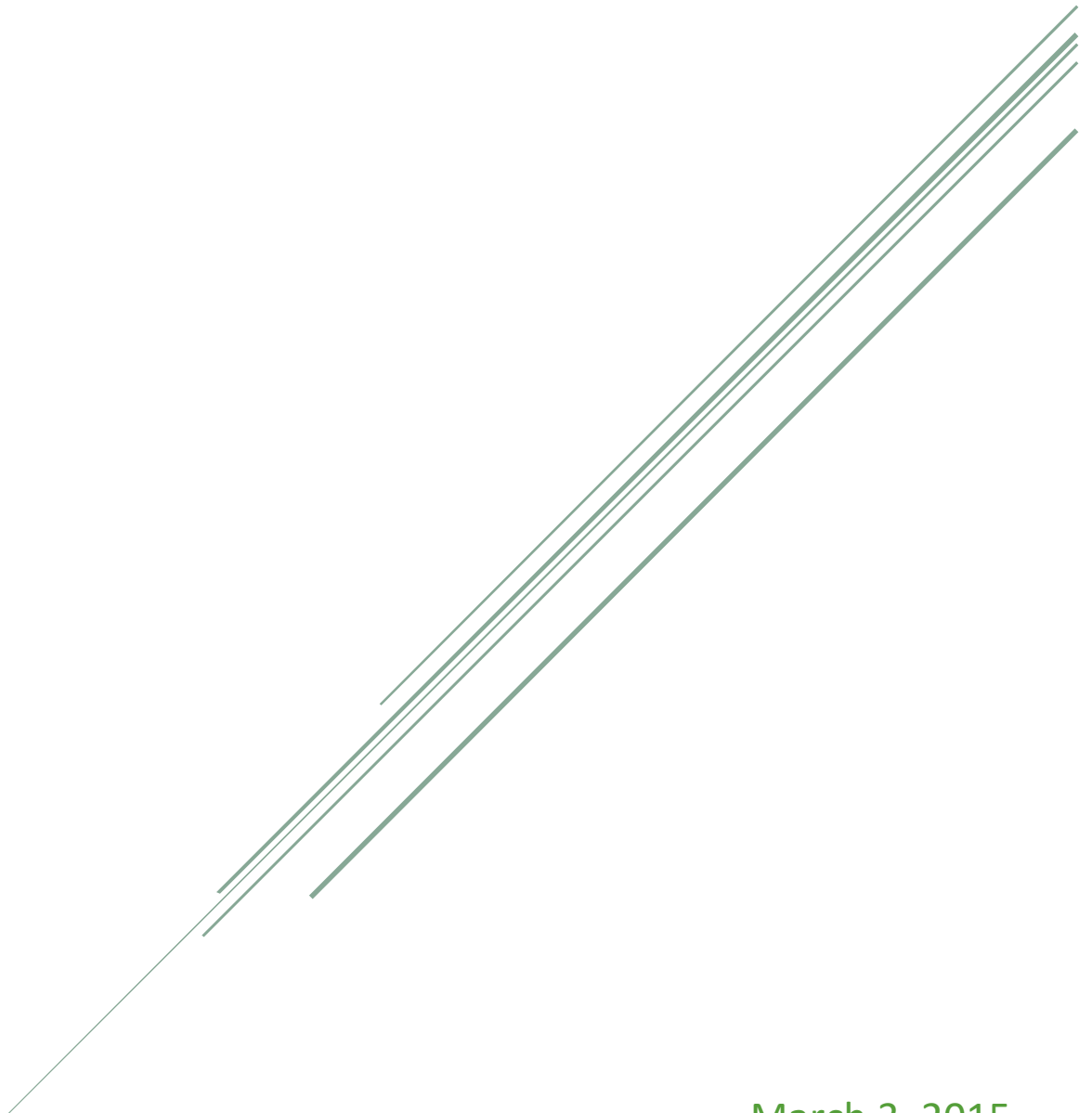




Central Kansas
COMMUNITY FOUNDATION

Strengthening Central Kansas Communities

STRATEGIC PLAN



March 3, 2015



STRATEGIC PLAN

Established March 2015

TABLE OF CONTENTS

Introduction & Executive Summary
Organizational Description
Mission Statement
Goals and Strategies

Appendices

- A. Goals and Strategies
- B. Description of Strategic Planning Process
- C. Strategic Analysis Data
- D. Description of Programs and Services
- E. Monitoring and Evaluation Plan
- F. Communicating the Plan

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Introduction & Executive Summary

Introduction

The Board of Directors and Staff of The Central Kansas Community Foundation developed this strategic plan with assistance from Advance Innovations LLC. It provides The Central Kansas Community Foundation with a five-year roadmap for Board, Financial/Funding, Technology, Marketing, Staff and Partnerships/Relationships. The Board of Directors and staff will review progress quarterly and will review and update the plan annually as needed.

This plan was developed with broad involvement and guidance from the Board of Directors and staff at a 5 hour Retreat held in early March 2015. The Staff assisted in formulating a survey of questions aimed at perceived board involvement, personal and board achievements, pressing issues facing the organization and SWOT Analysis

Advance Innovations LLC facilitated the planning process using key categories based on the survey and staff input. The current mission statement was revisited and revised. The facilitator asked the members present questions to think if the mission defines who the organization is and does it meet the wants and needs of the organization by defining the stakeholders involved.

Executive Summary

The Central Kansas Community Foundation's new mission is:

Building stronger communities through charitable giving.

Background and History

The Central Kansas Community Foundation began in 1995. Following a stable history serving the tri-county area the foundation merged with the well-established Greater Newton Community Foundation in 2009. Today, the Central Kansas Community Foundation continues to demonstrate a commitment to strengthening communities across the Central Kansas region.

Direction and Results

The strategic direction and goals included in this plan are The Central Kansas Community Foundation's response to its understanding of what its donors, contributors, affiliates, board and staff value most about the organization, and current opportunities and challenges for offering the opportunity for charitable giving for its organization as well as the affiliates it serves.

The five-year period of this strategic plan will be a time of assessing and deepening The Central Kansas Community Foundation approaches to its work. Concurrently, The Central Kansas

Community Foundation will take more of a leadership role in working toward building their organization to meet their mission of building stronger communities through charitable giving.

With a fresh perspective on its mission, understanding what it does well, and the environment in which it operates, The Central Kansas Community Foundation will pursue the following strategic direction:

1. The Community Foundation will emphasize **building its discretionary financial resources** to invest in providing quality services. This includes building the operational endowment.
2. The Central Kansas Community Foundation will further **assess the affiliate model and create procedural policy** for all affiliates coming into the Central Kansas Community Foundation
3. The Central Kansas Community Foundation will explore a **plan for future technology needs** of the organization.
4. The Central Kansas Community Foundation will explore the feasibility of **expanding the organization's visibility** in the community through marketing and donor recognitions/awards ceremonies.
5. The Central Kansas Community Foundation will further **assess the board selection process** and prepare volunteers and committees to assist staff when possible.

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Angie Baur, Executive Director – FT
Brenda Eitzen – Office Manager – PT
Chancy Gerbitz – Director of Programs – FT
Bill Hake – Program Coordinator – PT

Organizational Description

- The Central Kansas Community Foundation is celebrating 20 years of service, 1995-2015.
- Office is located at 301 N. Main, Suite 200, Newton, KS 67114.
- There was a merger in 2009 with the well-established Greater Newton Community Foundation.
- Attained National Standards through accreditation in 2010, currently preparing to submit reaccreditation application in June 2015.
- Members of Kansas Association of Community Foundations and Council on Foundations.
- In April of 2010, CKCF contracted with “Greater Horizons” to provide accounting services. As a result, our current accounting system provides 24/7 online access to you and your fund managers through “Donor Central.”
- In 2013 CKCF launched its online application process for grants and scholarships with a product provided by Community Force.
- Staff consists of one full time Executive Director, a full time Director of Programs, a part time office manager and a part time program coordinator.
- The organization began an affiliate model first with Peabody, KS nearly 10 years ago and since has grown to 13 smaller community foundations in the area as well as 3 non-community affiliates.
- The Full Board of Trustees currently meets every other month.

Description of Programs and Services

- Fund Types – Designated, Donor-Advised, Field of Interest, Scholarships and Unrestricted
- Manage Gifts – Cash, Stocks/Bonds/Mutual Funds, Real Estate, Personal Property, Bequest and Life Insurance
- Giving Cards
- Volunteer Opportunities
- Estate Planning Consultations
- Gift Illustrations

- Leave a Legacy Partnership
- Regional Support to Affiliate Foundations



Central Kansas **COMMUNITY FOUNDATION**

Strengthening Central Kansas Communities

Mission Statement

Building stronger communities through charitable giving.

Core Values

This would be a good idea for your organization to complete. Coming up with and understanding the values to drive the organization.

Appendix A: Goals and Strategies

Goal: *Create and establish funding opportunities for Operations, including the Operating Fund Endowment*

Strategy 1.1 – Create a fundraising campaign to increase the operating fund endowment

Strategy 1.2 – Utilizing the funded agencies and affiliates

Strategy 1.3 – Plan for affiliates to pay for themselves

Action Plan

<i>Objectives for Strategies Goal 1</i>	<i>Date of Completion</i>	<i>Responsibility</i>	<i>Status and Date Notes</i>
1.1.1 Board Members and Staff to come up with a fundraising campaign	By 12-31-2015	Create a committee of board members and staff	
1.1.2 Sit down with the Kansas Health Foundation for support/grant	September 2015	Board members and staff to attend a meeting	KHF has recognition grants in September and March.
1.2.1 Ask funded agencies to add logo or other publicity to their marketing materials – websites and brochures	Now and ongoing	Staff will drive with help from Board members	
1.2.2 Create an awards ceremony for designated funded agencies	By May 2016	Staff driven with board/volunteer assistance	
1.2.3 Build relationships with funded agencies	Ongoing	Staff driven with board involvement	
1.3.1 Create a plan to build and maintain momentum with affiliates to grow assets	By 12-31-2015	Staff driven with board involvement	
1.3.2 Create plan to get affiliates to pay for themselves	Plan by 2016 and then ongoing	Board driven with staff involvement	

Goal: *Building and creating relationships with partners for the Central Kansas Community Foundation*

Strategy 2.1 Create an avenue for open communication with and from agencies and affiliates.

Strategy 2.2. Create an avenue for agencies to tell their story

Strategy 2.3 Develop a “wish book” for agencies

Strategy 2.4 Build relationships with local attorneys and financial advisors

Action Plan

<i>Objectives for Strategies on Goal 2</i>	<i>Date of Completion</i>	<i>Responsibility</i>	<i>Status and Date</i>
2.1.1 Design a mechanism for communication with the funded agencies and affiliates	By 12-31-2015	Staff driven with board member support	
2.1.1 Begin a precedence to thank CKCF donors – letters, cards and/or emails	Immediately	Staff	
2.2.1 Allow agencies an opportunity to tell their story – website, events, media	Immediately	Staff	
2.3.1 Communicate with agencies and develop a “Wish Book” for agencies to list what they need	Ongoing after creation in 2016	Staff driven, form a committee with board members to assist	
2.4.1 Contact and meet with local attorneys and financial advisors	Ongoing	Staff driven with board members involvement	

Goal: *Board and Staff Process Creation and Updates to Organizational/Governance Documentation*

- 3.1 Review and update Board of Directors selection process and orientation
- 3.2 Board of Directors meeting schedule
- 3.3 Create committees to assist with certain areas of staff workload
- 3.4 Update all governance documentation

Action Plan

<i>Objectives for Strategies Goal 3</i>	<i>Date of Completion</i>	<i>Responsibility</i>	<i>Status and Date</i>
3.1.1 Review Selection Process for new Board of Directors	Prior to the next board cycle	Board Driven (Governance Committee) with staff involvement	
3.2.1 Change Board meeting schedule to monthly	Immediately	Board and Staff	
3.3.1 Establish committee structure to assist staff in areas that are feasible	January 2016 and ongoing	Staff driven with board involvement	
3.4.1 Update Bylaws of the organization	April 2015 (National Standard Driven)	Board driven with staff involvement	
3.4.2 Update Policies and procedures	April 2015 (National Standard Driven)	Board driven with staff involvement	

Goal: *Have Updated Technology – Hardware and Software*

4.1 Have a plan in place to replace outdated hardware and software to maintain quality work

Action Plan

<i>Objectives for Strategy 4</i>	<i>Date of Completion</i>	<i>Responsibility</i>	<i>Status and Date</i>
4.1.1 Create a plan/timeline to replace outdated hardware and software	By 12-31-2015	Staff driven with Board involvement	
4.1.2 Search and apply for technology grants	Begin immediately	Create a committee to assist with this endeavor – Staff driven with board involvement	
4.1.3 Seek out individuals/volunteers who may be able to assist in the technology	12-31-2015	Staff	

Appendix B – Description of Strategic Planning Process Used

On March 3, 2015, eight (8) members of the seventeen (17) member Board of Directors and three (3) staff members of the Central Kansas Community Foundation met with Advance Innovations LLC, facilitator Becky Wolfe. Prior to the Retreat, a questionnaire was sent to all board members and staff of the organization in which seven (7) of the seventeen (17) board members responded and all four (4) staff members. This questionnaire also included a simple SWOT analysis. The participants began the meeting exploring the organizations current mission statement and determined the mission needed to be revised. A series of questions were asked to come to a mission statement. Key categories were taken from the questionnaire which were areas of concern or needed work. The participants were asked to write their issues or opportunities on sticky notes and put in the corresponding category on the wall. The group went through each category and discussed what the driving force was and listed the actions they would like to see for each category.

Board and Staff Members Participating in the planning:

Megan Evans
Dick McCall
Kathy Stucky
Don Patry
Tim Hodge
Jennifer Vogts
NM Patton
Marjorie Warta

Angie Baur
Chancy Gerbitz
Brenda Eitzen

Recommendations and Cautions

It is characteristic for teams such as yours to come together for planning but have little follow through. Each board member as well as staff should view this tool as a work in progress and it is recommended that the tool be integrated in meetings for progress reports.

It is characteristic for boards with staff to rely heavily on the staff to guide the action. There are several items within this tool that are driven by the board of directors and the board should take that responsibility with staff involvement. The staff still must maintain their day to day operations to keep the organization going so be aware not to put too much responsibility of this plan to their work load.

Accountability to achieve the goals and actions rests on all shoulders to achieve success.

Recommendations: There is much planning that needs to be accomplished before implementation of several of these actions can happen. Create easily followed plans to allow for future board members and staff to follow. Make sure there are board/staff/committee assignments on each of the action items and that there is a date of completion on each item, which could change once you get into the details of the plan.

Appendix C – Strategic Analysis Data

SWOT

Strengths

Momentum, growth
Well Respected – Very Good Reputation
Customer Service
Knowledgeable – about 501(c)(3)
Hard Work
Creativity
Communication
Experience
Excellent Employees – Capable – Great Assets
Good Investment Program
Conscientious Board
Volunteers
18 million viable, sustainable entity
Greater Horizons Services
Well Known and liked
Public Relations with affiliates
Strong Management
Helping small Kansas Communities

Threats

Many philanthropic opportunities to choose
Other Foundations-larger and adjoining
Growing # of affiliates too fast??
Too many affiliates with low funds
Fragile economy
Other organizations more in limelight for donors
Work Load
Costs of being host
Donor privacy jeopardized with # of affiliates
Market Returns
Overextending abilities with staff time & budget
Burnout or unable to provide services needed
Investment risks

Weaknesses

Pulled in many directions-operational deficiencies
Geographically spread out
Technology
Affiliate independence
Time to meet and devote to potential donors
Overworked staff – short staffed
No plan for growth
Increasing overhead
Limited opportunity to add affiliates
Not enough volunteers
Fear
Took two staff positions and made one
Not enough resources to do the work

Opportunities

Community Foundations more understood
Assisting donors with estate planning
Educating donors
Creating volunteer pool from affiliate boards
Ideally situated to attract potential donors
Opportunities for growth
Growth via effective outreach
Reminders of who/what CKCF is
Lot more to offer than other organizations
Operations campaign – 20 million for 20th year
Have a waiting list to get on the board
Cross training – learning new things
Options for volunteers to help
Continued growth of funds
Reach all possible with the message

Responses to questionnaire:

1. What is **your personal role** as staff for CKCF?
7 board members and 4 staff returned the questionnaire

2. What is **your greatest personal achievement** as a staff member of the CKCF team?
Personal achievements were on a wide spectrum for the board members – it seemed somewhat difficult for them to look personally. Most seemed to look at the board rather than themselves (a couple were able to personalize it).
 - *It's a board of listeners more than doers – don't feel especially accomplished*
 - *Enjoyed helping host events, volunteer to keep CKCF front and center*
 - *Rewarding to see philanthropy at work – contributions allow beneficiaries to achieve goals*
 - *The process of hiring Angie. I speak out at meetings when I have questions and try to stay updated.*
 - *Personally delighted with the growth of the foundation since 2008 low point. Good management, improved economy and new affiliates brought this about.****Staff members were able to bring more personal perspective***
 - *Transferred most of the grant and scholarship cycles to an online application system – which makes go smoother for all*
 - *Regional relationships that have been built – showing results in gifts*
 - *Bringing order to files and data with rapid growth of business*
 - *Worked with Sandi Fruit during a period of growth – served as board president and finance committee chair*

3. From your perspective, what is the **greatest achievement of CKCF** since you have been employed?
Board:
 - *Increased staffing and begun providing stronger support to a growing list of affiliates*
 - *Foundation is experiencing marked growth in total assets. Affiliates have grown-marking CKCF to be an expert in smaller community start up plans*
 - *The growth of the foundations over the years and the increase in scholarships and grants*
 - *The hiring of the new director*
 - *The foundation's support of youth programs***Staff:**
 - *The growth of the Foundation with affiliates and assets*
 - *16 million in assets – knowing we are only going upward*
 - *Growth and greater giving back to the communities*
 - *Growth from 5-6 million assets to over 18 million – managing the change*

4. In your opinion, is the CKCF Board a working board (active in the organization's work) or a non-working board (not very active in the organization's work).
Board:
 - *Not very active from a direct CKCF standpoint but active in the general work of philanthropy and development in their communities*
 - *The board is a non-working board overall with the exception of a few willing to roll up their sleeves and get elbow deep.*
 - *The board is active in overseeing the policies established by the board. The board is not active in the day to day operations.*

- *Most of the board is not very active. There are a few members who are active. The board has depended on the director and then has just approved.*
- *The board members attend meetings, come prepared and are active in board discussions.*

5. What is/are the most **pressing issue(s)** you see for the CKCF right now – in the present?

Board:

- *Operational Issues – our operational income is not sufficient to cover our operating expenses unless we grow. This has cause board focus on income generation and expense reduction rather than our mission.*
- *Operating budget shortfall. We need to come up with a plan to break even at the very least. This will require work and cooperation from all board members.*
- *Continued growth to sustain continued increasing operating costs.*
- *I think there are 2 big issues: The biggest is how much can we handle the growth of adding affiliates and when do we have enough. Do we change course? Next is we are CKCF and the Newton community itself doesn't have an affiliate. This seems to be a touchy topic and I have brought this up.*
- *As we expand our reach, can we outrun our increasing overhead?*

Staff:

- *The foundation is growing at a fast pace. Without staff and volunteers the Foundation does not have the strength to keep up.*
- *Management of the volume of services from donor relations, recognition of Newton as a community foundation, affiliate support, accounting, governance development and national standards.*
- *More staff and time to keep organization running due to growth but tight budget not allowing for that. Procedures and order fall through the cracks.*
- *Managing investments to grow funds and staff settling into new roles*

6. What do you, personally, want to see the board achieve in the upcoming planning retreat?

Board:

- *Discussion on giving the Newton community an affiliate status with its funds to have a pure identity. Affiliate status would help emphasize the strength Newton has within CKCF and bring clarity to decisions on expenditures.*
- *Plan of action for generating revenue to cover operating for the year and over next few years, also a formula or plan developed for ensuring operating budget going into the future. Develop a long range plan of action – assign duties. Board commitment for year strategic planning.*
- *How I can be a better board member that would benefit the organization*
- *Get the board engaged.*
- *As we expand our reach, can we outrun our increasing overhead?*

Staff:

- *The board take a more active volunteer role within the organization as well as feel more comfortable to go out and talk about the foundation to others.*
- *Providing clear goals and direction for the agency. Providing priority focus to staff – day to day*
- *Accurate vision on what the staff does – all of the hats each one wears and the time constraints on us. The knowledge this is a unique business, not an 8-5 job. Clear and realistic goals for 2015*

Below is the information from the notes for each category discussed during the Retreat.

Technology

Latest Technology
Excellent Records & Technology Access
Transferring more “online”
Network Computer Conversion
Vendor – Technology support issues
Privacy & protection of donor information
All affiliates are on the same system

Marketing

Improve marketing to smaller communities
“Thank you’s” from CKCF for donors
Get name and work out there
Educate public on role of the foundation
Social Media
Increase donations
Attention getting materials
Branding consistency at host & affiliates
Use charitable organizations to advocate

Financing

Solvent Organization
Good Investment Return
Growth
Grants to assist operating/strained by affiliates
Create new funds that are not labor intensive
Land acquisition/need more sound policy
Service/touches to affiliates with little \$ invested
 How to balance
Growing assets under management
Sound yearly return
Operating budget shortfall
Balance budget
Reap high returns for more grant giving
Investment advisors review of performance

Board

Volunteer needs are driving growth spurt
Board Diversity
Influential Board
Some Board Members absent
Board attendance commitment
Good, effective board, quick meetings
Active Board

Relationships/Partnerships

Good relationships with financial
 planners, donors & nonprofits
Affiliates level of need vary
Develop relationships/affiliates
Grow the number of affiliates
Growth-how much & when
Distance from affiliates
Growth of the Foundation
Build attorney relationships
Volunteers
Get affiliate boards engaged

Staff

Staff overextended due to growth
Job descriptions out of date or do not exist
Short staffed
Personnel policies & procedures outdated
Reaccreditation – time limit/policy
Scholarship oversight – growth - workload
Board support of staff for encouragement
Great staff
Support mission – hard working
Internal knowledge on fund documents
Staff burnout
Not enough staff for the need

Appendix D – Descriptions of Programs & Services: *Serving Central Kansas for 20 years*

CKCF is a Vehicle for Charitable Giving

Central Kansas Community Foundation (CKCF) provides a variety of services and resources to donors as well as public charities throughout Central Kansas. Building Stronger Communities through Charitable Giving as our mission requires 4 key principles – donor relations, grant making, leadership and advocacy. Donor relations are paramount to our work. Providing leadership and advocacy is also foundational to our promotion of philanthropy. As of January 2015 we provide support to 347 funds of which 49 are scholarships. Assets under management are \$18,600,000+.

Below are the primary ways CKCF provides our services as a regional community foundation.

Create a Fund

Many donors, individuals, families and businesses, wish to establish a new endowment with Central Kansas Community Foundation. An endowment is a fund in which the principal is invested in perpetuity and only the income generated is distributed annually. This allows your gift to benefit our community forever.

There are several options for donors wishing to start a new fund:

A **Designated Fund** is established for a specific organization, fund, or charitable purpose of your choice.

Donor-Advised Funds allow you to make recommendations on distributions on an annual basis.

A **Field of Interest Fund** enables you to specify an area of interest, such as education or the arts. The foundation board of trustees reviews community needs and makes distributions to benefit projects or causes in that specified area.

A **Scholarship Fund** is established to support individual students in their educational endeavors. As the donor, you may help designate the criteria used in selecting recipients of the scholarship funds.

By starting an **Unrestricted Fund**, you allow the foundation board to be flexible and proactive in meeting the changing needs of the community.

Ways to Give: Ability to Accept Assets in Varsity of Ways

A gift can take many forms. It all depends on which is best suited to the donor goals and assets.

CASH

Cash is easy, direct, and fully tax-deductible as allowed by law. Donor can make gift by check.

STOCKS, BONDS, and MUTUAL FUNDS

These tools enable a donor to avoid the tax on any appreciation, yet still receive a tax

deduction for the full market value. The foundation, as a tax-exempt charity, may sell the securities and avoid taxes on the appreciation.

REAL ESTATE

Land or a building can be given in a number of ways and allow a donor to avoid taxes on the appreciation. The donor must obtain a qualified appraisal to establish the gift value.

PERSONAL PROPERTY

Personal property such as automobiles, art work, jewelry, valuable collectibles, antiques and more can be donated to give a donor a charitable tax deduction for the full fair market value.

BEQUESTS

Whether through a donors' will or a living trust, they can specify a dollar amount, property or a percentage of your estate go to charitable causes. Central Kansas Community Foundation must be named as the charitable beneficiary. A signed Donor-Advised Memorandum is required to name the charities and endowment funds that will benefit from the donor bequest.

LIFE INSURANCE

Life insurance is an affordable way to give a significant amount. A Donor can make the foundation the beneficiary of an existing policy or a new policy they may choose to purchase. A variety of options are available, all of which provide tax advantages and allow a donor to leverage your dollars for maximum impact.

Giving Cards – A Gift that makes a Gift!

Much like retail gift cards, Giving Cards are given to celebrate birthdays, holidays, a job well done, or other special occasions. Giving Cards can be redeemed to benefit any 501 (c) (3) public charity in the United States (including schools, churches and synagogues). A gift that makes a gift! Our office can assist in facilitating the purchase at a level of giving you wish.

Promote Volunteer Opportunities for Charities

Our goal is to help match those who wish to give a gift of time with an organization that they find rewarding. This is also beneficial to the organizations that are in need of volunteer assistance.

Community Impact

Not for Profits

Establishing relationships with non-profit organizations is very important to Central Kansas Community Foundation. The more we understand about trends, needs and services available the better we can help donors align their gifts to a cause. WE convene providers on like initiatives and pride ourselves also assisting with circulating other funding sources to charities we work closely with. Plus we provide grant opportunities throughout our geographic region.

Scholarships

Scholarships are available for a wide variety to unified school districts in the Central Kansas Region, as well as scholarships that are degree or region specific. We provide

an online application tool for ease of application for students. We coordinate selection with the local high school counselors. While we also provide due diligence for our donors by reviewing eligibility and criteria for selection with review teams to ensure intent of donors are honored in the selection process of recipients.

Grants

Currently, Central Kansas Community Foundation awards grants through the Central Kansas Kids Fund and Women's Community Fund in the local area of Newton/Harvey County; while we oversee the grant distribution processes throughout our affiliate territories. Numerous grant cycles occur year round. Notifications are available on line by viewing APPLY NOW button on CKCF website, www.centrankansascf.org.

Notification of Scholarship and Grant Cycles

We regularly forward important notices about grants and other programs by mail and/or email. We maintain a master contact list for these purposes.

Complimentary Estate Planning Consultations

A comprehensive personalized estate plan is necessary to ensure your wishes are carried out. They also provide successor management of one's estate in the event of incapacity and distribute assets at your death to family, and if you choose to charity, all while keeping your estate settlement costs to a minimum and reducing or eliminating taxes.

Central Kansas Community Foundation offers complimentary estate planning services whether a donor just need a quick review and/or update of their existing plan or are starting from scratch.

Gift Illustrations Available

The Central Kansas Community Foundation utilizes Crescendo software to create gift illustrations for our donors and/or their financial and legal advisors.

Financial and legal advisors on behalf of their clients who are considering a charitable remainder unitrust, a lead trust, gift annuity options, or any other planned gift as a part of their estate plan can call us and we will be happy to create an illustration that crunches all the numbers, provides both a simple explanation and a more detailed explanation of the concepts, and reviews the tax implications. We will provide this free of charge and anonymously if requested — no need to share a client's identity or personal information.

Leave a Legacy Partnership

Leave a Legacy is a public awareness campaign designed to inspire people from all walks of life and income levels to think beyond their lifespan when doing good works. This annual campaign in a partnerships of local philanthropic arms of local charities in Newton and Harvey County. The Community Foundation provides office support and resources to this partnership that annually provides a luncheon for awareness and recognition of philanthropy. Contact the community foundation to make a difference in the lives that follow or to find a charity to support through your will or estate. We are happy to help a donor explore options.

Regional Support to Affiliate Foundations

The Central Kansas Community Foundation provides affiliate services to communities across Central Kansas. The opportunity to affiliate with CKCF provides smaller communities the

ability to create and manage their own community foundation and to offer the same services normally available only through larger foundations. Affiliate foundations are locally led, locally governed and directed towards local needs.

As a component of the Central Kansas Community Foundation, the affiliate benefits from “turn-key” operations. The staff of CKCF handles the administrative details of gathering the funds, growing them and granting them out as appropriate. Because everyone shares in the costs, administrative expenses are held to a bare minimum.

- Non-profit status
- National Standards
- Local control
- Minimal start-up expense
- Financial and Administrative Services
- Greater Investment Diversity
- Marketing Materials
- Training and Assistance
- Estate Planning Services

Appendix E – Monitoring and Evaluation Plan

Responsibilities and Frequencies for Monitoring and Evaluation

Plan	Completion Date	Responsibility	Written Description of results to:
Incorporate entire plan into every board meeting	Every other month now (monthly if meeting dates change)	Board President and Executive Director	Board President and Executive Director
Consultant Progress check in with team	July 2015	Becky Wolfe Advance Innovations LLC	Consultant
Progress check in meeting of board for 12 month evaluation of progress	March 2016	Board and Staff	Board President and Executive Director

Reporting Status and Implementation

Results of monitoring and evaluation will be in writing and will include:

1. Use plan as a point of measure for board assessments and staff performance reviews as well as board debriefs. If adjustments need to be made, make them. Create a plan where there is consensus among the board and staff.
2. Discuss trends regarding the progress or lack of progress being made toward goals and action steps. Record which objectives are specifically impacted. Progress or lack of progress may impact other objectives and goals in the greater plan. BE AWARE
3. Any actions needed by the Board of Directors need formally brought to their attention, no assumptions. Keep open communication and dialog between board and staff.
4. Recommend use of the following questions to stay on topic with progress related to monitoring and evaluation.

Key Questions While Monitoring the Implementation of the Plan

Monitoring and evaluation activities will consider the following questions for forward movement.

1. How are goals, objectives and action steps being achieved? If they are not being achieved, why not? If they are – acknowledge, reward and communicate the progress.
2. Will the Board of Directors and staff achieve the goals according to the timeline? If not, why?
3. What changes need to be made to the timeline in order to make progress? (Be careful – have a clear understanding why efforts are behind schedule before times are changed)

4. What resources does the staff and board need to make progress on the plan? (money, equipment, volunteers, facilities, training, etc.)
5. How will you determine if the goals and objectives are realistic?
6. What changes in priorities need to be made to achieve these goals and objectives?
7. What changes to the goals need to be made to make progress? (Be careful – know why efforts being made are not achieving the goals before changing)
8. What can be learned from our monitoring and evaluating this plan in order to improve the future planning activities?
9. What can be improved on for future monitoring and evaluating the progress of the plan?
10. If success was completely guaranteed, what bold steps could be chosen?

Appendix F– Communicating the Plan

Certain stakeholders may get complete copies of the plan, including appendices, while others (usually outside of the organization) might receive only the plan itself.

This plan will be widely communicated including use of the following approaches:

1. All Board of Directors Members – current and future
2. All Staff – current and future
3. Announce, post and integrate the new mission statement. Develop places to post within the office and on marketing materials, including the website and other internet sources.
4. Include portions of your plan on social media, website, newsletters, etc.
5. Integrate portions of the plan into job descriptions, policies as appropriate.
6. Consider copies of the plan to major donors, affiliates, and other major stakeholders.

This report was prepared by:

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Engaging People. Expanding Horizons.