

## **Combined FULL notes – 3 in person facilitated sessions**

### **Why did you get involved with your CF?**

- To give back
- Worthy charitable cause
- Associate through employer or partner agency
- General Community involvement
- Volunteering with like-minded individuals
- Lifelong resident as well as returning to community for a job or in retirement – want to offer service to community and want to see it prosper - schools, general pride
- Seeking rewarding experience
- Organizational reputation and existing leadership
- Invited to get involved at both ckcf and affiliate levels, including being founding member of their affiliate CF.
- Saw some situations that could be handled more efficiently – part of solution not problem

### **What do you hope to see for the future of your foundation and your community?**

- Growth – Assets and Number of Funds, expand # of donors, population, economy
- Community Vitality, Community Revitalization, Community Spirit
- Offer a Convener Role, Engage in Collaboration, Be Creativity in community needs and their solutions
- from funds that people didn't expect (i.e., funds to HS to A/V – expanded the school's ability in this area – watch games) This exploded during COVID audiences were limited, so they figured out how to livestream games
- The CF is a vehicle for positive change
- Specific projects for community betterment and economy – childcare, parks,
- Enhancing public/private partnerships – no one can do this alone and want to stand as partners not competitors for donor dollars
- Desire to engage more students - HS students, Jr Grantmakers, create avenues to engage youth
- Broader engagement – representation of the actual community voice, diversity – economics, race, age, interests, etc.
- Promotion and Education about what a CF is and how we serve – more people need to know about us
- Foundation(s) stand ready to respond to new trends, changing tides, new opportunities.
- Growing our communities with our funds but also aligning with local and regional philanthropy efforts
- Success through sharing and modeling amongst staff talents, affiliate experiences and development opportunities

### **What has your foundation done that you are most proud of?**

- All-inclusive playground, library, childcare center, splash park
- PFF Match Opportunity – building donor confidence and board confidence
- CKCF 2020 upgraded their accounting system software

- Being a change agent that supports grassroots efforts in the community - playground, frisbee golf, splash pad, EMS in Hesston
- Impact Investing Launch and Loan, bonus 1st loan paid back
- Disaster Response Readiness – we are the Kansas foundation in 10 state cohort group
- Maintaining core ckcf staff
- Engaging in more grant application processes on behalf of initiatives in our region
- Working on flood control issues.
- Sustainability – Anniversary Celebrations
- Newsletter promotion
- Grantmaking for community betterment and positive change
- Host having new office space – centralize location, events, and hosting prospective donors, including own board room.

### **What concerns you the most about the future of your CF?**

- Volunteers – new ones, not burn out the old ones
  - Reviewers, Board members
- Daunting community issues: Housing – dilapidated, ugly, abandoned, childcare resources, education systems including school consolidation, labor force, boomer retirement and leadership void, growing needs, rising costs, drug and alcohol abuse, mental health, living wage and retention wage/benefits
- Not understanding my role as a volunteer board member
- Finding youth that are willing to step up and take responsibility.
- Rural population eroding
- Economic downturns, Investment Performance
- Staffing capacity for Patterson Family Foundation.

### **What do you see as CKCF's strength?**

- Communication
- Newsletter and Social Media - Spotlight / Broadcast info for our region and affiliates
- Reinforcement of we are one and also distinct parts of a whole
- Donor Advisor relationships
- Regulatory compliance – National Standards
- Customer Service
- Staff
- Software/accounting system
- CKCF Board of Directors Leadership and inclusiveness of affiliate members
- Diversity – ideas from other foundations
- Reputation, a relationship forged over decades, recognition and being eligible for opportunities
- Trusted and respected
- Flexibility, we are accommodating, think outside the box, open to new ideas (while still following rules/regulations)
- Program support - scholarships and grants, events, disaster response
- Host relationships -- opportunities like Patterson and Funders Network
- IRS Compliance and audit & 990 filing
- Contacts of a bigger organization (rather than a small one)

- CKCF provides central point of contact to bring things to the affiliates
- Situational - helping affiliates as needed.
- Affiliate and CKCF tenured board members and committee chairs

**Do you feel like you are part of the larger CKCF family?**

- Yes, A good enough connection to have good connection with CKCF.
- Hearing what other affiliates are doing, best practices
- No, not for the first couple of years. Larger CKCF wasn't explained well it felt heavy-handed, more communication over time working on onboarding helped improve this.
- Affiliates without staff/director. Want to stay connected we feel on the island currently.
- Ways to connect with other affiliates as needed. Building the network.
- Yes, education pieces (Summit), and learning opportunities.
- Hard as many volunteers work full-time jobs elsewhere
- Best ways to engage - days, times, locations, etc.
- Yes, I can call and get the answers I need from CKCF staff to keep local work moving
- No can't attend a lot of programs offered by host.
- Yes as we have a board member on the CKCF board that brings information back to us
- Direct line with Becky Nickel being Director at Peabody she provides great direction
- Heard both help connect us more with other affiliates to focus on us hearing about others is not helpful to our local needs.
- This could be improved.

**How would you describe your relationship between your affiliate foundation and CKCF?**

- Very good relationship with CKCF, board members, regular communications, healthy dialogue, willing to challenge processes to make situations better; collaborative, good, mutual respect
- Identified some things at the local level that did not seem to make sense as affiliate. Has caused frustration on both sides but it is to make things better.
- Rules/Regulations – feels like they are “cops”
- Appreciate:
  - Managing grants/scholarship cycles and distributions
  - Investments and Fund Management
  - Assistance with new fund development, establishing new fund MOU's
  - Patterson – getting info to affiliates on that
  - Liaison Role – between board and staff
  - Board member orientation and state of foundation zooms
  - Helping managing a professional email for each affiliate
  - Having an affiliate board member to CKCF board is very helpful.
- Suggestions:
  - Have a secretarial position to free up the staff here to not have to answer phones, etc.
  - Get affiliates more involved and engaged
  - Evaluate our host/affiliate model – Is that what we should do? What are other regional CF's doing?
  - AA and PoP documents provide some but need more explicit expectations for affiliates and their board chair/members we work best when we work together
  - AA and PoP are signed but – what are the consequences to not adhering

- Don't be figure head, you are on a board for a reason –do something
- Continue having affiliates on the CKCF board
- Try to get younger people on board
- Our affiliate challenges CKCF on processes and materials
- CKCF - we try to be responsive to needs, and requests and get back to people as quickly as possible.

### **What are the most important services that CKCF provides to affiliates?**

- Grant and scholarship software to run cycles smoothly.
- Legal ramifications would be hard to manage funds without CKCF's help.
- Regional Happenings
- Investment opportunities – would be hard for a small affiliate to control and manage.
- Economies of scale
- Events – monitoring what is covered by insurance and what is not
- All administrative duties
- Accounting and Financial Service - nice to have someone else taking care of that.
- Letting us know what we can and can't do rules/regulation.
- Planned giving.
- Review Team cooperation – stick to schedules
- Leadership Gatherings. Get more chairs/directors in the same room at the same time

### **What are some areas that CKCF could improve?**

- Investment Management
- Continued communication / outreach. Listening and being willing to adapt.
- Training on donor development, how to ask for money, keep donors engaged.
- Information sharing of those affiliates that don't have a director.
- Staff capacity as well as volunteer capacity
- Help with technology
- Invest Central Kansas – how to identify opportunities on this.
- Training on donor development, how to ask for money, keep donors engaged.
- Technology support
- Invest Central Kansas - how to surface opportunities on this.

### **What are strengths and weaknesses for grants / scholarships or donor relationships?**

- The software platform is user friendly. screenshots and instructions.
- Online scoring system. Applications are all being scored the same way – but making sure the affiliate focus is part of that process too.
- More hands on
- Can be very intimidating living in a small community and asking for money.
- New board member orientation.
- Keep timeline of Important events, big gifts for each CF so that when chair changes they have the history on CF
- Media and newspaper coverage.
- Educate and celebrate!

- Having a mentor for new board members.

**What value / potential do you see for Impact Investing in your community?**

- Nice to have to offer people that may be interested.
- Still opportunity for tax credits (entrepreneurial, program has been promoted but people aren't using it)
- Making sure folks know that it is available.
- Education has not been on their radar. No board discussion on this.
- With interest rates going up, should we communicate this more? Surely there is work that fits and would benefit from a low-interest loan.
- Staff is limited.
- Its an unknown product/opportunity
- Complexity here – seems like a lot of work - forms, processes
- Loans that help the community, money we give and then get back
- Some loans give us a better return than some of our investments

**What is most important to you? Role in your community, CKCF, affiliate.**

- Growing donor base – wish there was an easy way to do that.
- Trying to identify opportunities – trying to understand what we do well, figuring out balance, where do we spend our time / efforts.
- Are we using a model that is working? Should there be more time for affiliates chairs to gather.
- Do we serve our affiliates more than our donors?
- Continue to serve affiliates, donors, staff.
- “Nothing happens until somebody sells something.” Help non-profit think they are business people. Some non-profits don't operate like they are business people. Train them to think this way.
- Building a better tomorrow for generations to come.
- Want to leave a legacy- bigger than myself.
- Connecting donors that care for causes that matter.
- Making community better!
- Collaborative environment
- Joint Effort
- Leave this place better for those who come after us

**What else do you want to make sure we capture from our time together today?**

- Are intentional and adaptive to make changes and utilize this information. It is easy to gather the info but do nothing with it.
- Liaison position - what would this look like if you could have anything you wanted, what would this look like?
- Ways to connect affiliates? Those with similar interested, projects (Message boards)
- Having board packets for affiliates, more help during transitions.
- A day of training on the software.
- Lifting up affiliates – showing appreciation for their efforts