

Central Kansas Community Foundation Host-Affiliate Roles and Responsibilities

The host-affiliate organizational model creates an effective way for rural community foundations and other small charitable organizations to leverage their ability to promote and facilitate charitable giving in their communities.

The benefits of the model include:

1. **Specialization and Efficiency** – the host foundation focuses on core functions, while affiliates specialize in generating positive impacts in their community. This structure allows each affiliate to concentrate on using their local knowledge to understand and meet the needs of their community and donor base.
2. **Resource Sharing** – affiliates benefit from shared resources (such as administrative support, technology, legal and tax compliance, pooled investment management, and others) provided by or through the host foundation. Memberships within professional organizations.
3. **Local Adaptation** – affiliates can tailor their strategies to their local communities, cultural nuances, and donor preferences.
4. **Coordinated Activity and Development** – the host foundation can better access outside resources using the aggregate size and activity of the affiliates, and act as a single point of contact and coordinator for these resources.
5. **Operational Standards and Expertise** – the host foundation maintains standards, practices, and institutional knowledge that ensures the organization’s nonprofit status and national standards accreditation, along with consistency and continuity among the volunteer-based affiliate boards.
6. **Collaborative Innovation** – affiliates share their best practices, fostering cross-learning and innovation.

Host Roles & Responsibilities

A. Administrative

- i. Full back-office accounting and treasury functions
- ii. Donor Fund activity reporting to Fund Advisors and affiliate boards
- iii. Maintaining competitive grant and scholarship cycles
- iv. Other grant administration as necessary
- v. Online giving platform

B. Legal & Compliance

- i. Annual Audit Report
- ii. Annual Form 990 IRS Filing
- iii. National Standards Accreditation
- iv. Insurance – general, director & officer, events, cybersecurity
- v. Event and fundraising risk and compliance oversight
- vi. External grant administration as appropriate or needed

C. Investment & Fund Management

- i. Investment Policy and Objectives
- ii. Oversight of Investment Managers
- iii. Annual Distribution recommendations in compliance with the Uniform Prudent Management of Institutional Funds Act

D. Board and Staff Support

- i. Hire, train, supervise, and direct activities of host staff members
- ii. Coordinate hiring, training, supervision, and direction of affiliate staff members (technically employees of the host) with affiliate leadership
- iii. Payroll and benefits management for all staff members
- iv. Support for educating board members, donors, and other community stakeholders
- v. Provide new board member orientation at an affiliate level; also orientation for officers

E. Affiliate Coordination & Representation

- i. Centralized liaison with Kansas Association of Community Foundations
- ii. Coordination of external grant opportunities and applications (i.e., PFF, PPREP)
- iii. Understanding and monitoring of trends and opportunities in the community foundation sector, including changing legislation, tax codes and national standards.

F. Affiliate Support & Tools

- i. Strategic and long-term development guidance
- ii. Affiliate board meeting support
- iii. Training and assistance to affiliate boards as needed
- iv. Affiliate Toolkit reference information
- v. Donor Fund Agreement documentation and execution
- vi. Planned Gift discussions and documentation
- vii. Education and communication (i.e., Affiliate Summit, New Board Member Orientation, State of the Foundation, other)
- viii. Marketing/Promotional material and resources

Affiliate Roles & Responsibilities

A. Community Engagement

- i. Relationships with key stakeholders – city/area government, school district, local charities, civic organizations
- ii. Understanding of community needs
- iii. Presence and involvement in local projects, community events, and conversations
- iv. Social media engagement and foundation awareness

B. Donor Engagement

- i. Relationships with existing and the cultivation of new donors
- ii. Promotion and public education of what the foundation does and can do

- iii. To grow community endowment

C. Strategic Planning

- i. Community impact objectives – long-term & short-term
- ii. Endowment growth opportunities
- iii. Execution of plan
- iv. Be aware of the CKCF Strategic Focus Plan and utilize as appropriate with your local plan

D. Advisory & Operational Functions

- i. Follow procedures and processes outlined in the Affiliate Agreement and Procedures of Operation, including providing board agenda and minutes to CKCF.
- ii. Include ambassador of CKCF Board, CKCF Affiliate Liaison, Executive Director and/or CEO in their communication
- iii. Fund Advisor for unassigned funds
- iv. Hiring, training, supervision, and direction of affiliate staff members in local matters and initiatives (shared responsibility with host foundation)
- v. Campaign and event planning
- vi. Marketing and promotion
- vii. Operational budget and management
- viii. Compliance oversight including completion of annual compliance documents