

# Central Kansas Community Foundation and Affiliates Strategic Focus Plan

## MISSION

The mission of Central Kansas Community Foundation is *Building Stronger Communities Through Charitable Giving*. Located in Newton, Kansas, CKCF is a host foundation to 19 affiliates in the Central Kansas region, supporting rural philanthropy.

## INTRODUCTION

This plan is intended to offer focus areas that may inspire affiliates and their communities to, “**Go the same direction differently**”, between summer 2024 and summer 2027. Focus areas are not assignments; they are invitations. We hope that affiliates will see space for themselves in the plan—to work on shared goals and to shape how we do the work.

The plan is also intended to show how CKCF, as a host, supports its affiliates.

Throughout the planning process, CKCF gathered information from its affiliates through a survey, a series of listening meetings, an in-person Summit, and with affiliate representatives on the project design and writing teams.

This plan is intended to support all affiliates, volunteer or staff supported.

Due to the welcomed investment by the Patterson Family Foundation prior to the time this plan was adopted, a great deal of operational change is on the horizon for CKCF and several of its affiliates.

In light of this, the plan says more about the direction we wish to go rather than offering the specific path for getting there. We are confident progress will be achieved with meaningful attention to local and collective goals and objectives outlined herein.

## **INTRODUCTION TO THE HOST-AFFILIATE RELATIONSHIP (pg. 3)**

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.

### **Strategies For Best Practices**

#### **I. COMMUNITY IMPACT (pg. 3)**

##### **a. Community Engagement and Convening**

CKCF and its affiliates will continue to build community relationships that lead to meaningful dialogue, a deeper understanding of what is needed, and a shared commitment to what is possible.

##### **b. Endowment and Asset Growth**

CKCF and its affiliates will grow assets with particular emphasis on endowed funds. Strategies toward growth include expanding donor development, grant writing, and planned giving efforts.

##### **c. Local Project/Program Support**

CKCF and its affiliates will continue to pursue innovative and meaningful ways to support local projects and programs that provide quality of life and community pride.

#### **II. COMMUNITY PARTNERS /RELATIONS (pg. 6)**

Deepening partnerships for the benefit of diversity involves expanding our reach to ensure all voices are heard from our communities. In our work from the board table, from grant-making to project collaboration, we will seek to keep a broad view of community sectors for the engagement work.

##### **a. Sector Engagement**

##### **b. Community Partnerships**

##### **c. Project and Grant-Making Support**

#### **III. DASHBOARD MEASURES (pg. 6)**

##### **a. Foundation Indicators**

A best practice for monitoring progress includes looking at certain indicators within your foundation.

#### **IV. CKCF AND AFFILIATE COMMITTEE STRUCTURE (pg. 7)**

*Affiliates to consider having committees as needed.*

##### **CKCF Committee Structure**

##### **a. Donor and Affiliate Relations**

##### **b. Governance and Compliance**

##### **c. Finance and Investment**

##### **d. Executive Committee – Strategic Development**

## HOST - AFFILIATE RELATIONSHIPS

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, along with 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.

## STRATEGIES FOR BEST PRACTICES

### I. COMMUNITY IMPACT

#### **a. Community Engagement and Convening**

CKCF and its affiliates will continue to build community relationships that lead to meaningful dialogue, a deeper understanding of what is needed, and a shared commitment to what is possible.

CKCF and Affiliates may accomplish this through:

- i. Local volunteers or staff using community touch points—civic clubs, elected officials, city and county staff, and other community leaders—to share the mission of the foundation and explain how it is positioned to effect change in the community.
- ii. Preparing each board member to become an ambassador for the foundation in their community, offering to present about the foundation at existing community events such as alumni banquets, chamber breakfasts, and charity networking events.
- iii. Hosting smaller events such as coffees and lunches.

- iv. Coordinating community conversations on trending topics of interest or concern in the community to help area stakeholders identify needs and potential solutions.
- v. Social Media Engagement.

The tools from CKCF, as the host foundation, will support this work by:

- i. Timeline data sets per affiliate.
- ii. Public relations guidelines.
- iii. Examples and tools for what successful community engagement and convening looks like handouts/tools, instructional guidelines helpful hints, restrictions.
- iv. Grant and Scholarship officers provide expertise in respective areas to local foundation board members, staff, and school counselors.
- v. Social Media content post examples and recommending posting 2-4 times a month.

**Foundations will demonstrate progress with *community engagement and convening***

CKCF:

- 1) As host, provide standardized tools identified within 6 months
- 2) CKCF will provide ancillary tools as requested within 60 days of additional requests
- 3) CKCF Ambassadors participate in assigned affiliate board meetings

Affiliates and CKCF:

- 1) Participate in the engagement activities at least monthly
- 2) Board members and staff are encouraged to attend events such as the Affiliate Summit, CKCF Soiree, Affiliate Award Ceremonies, etc.
- 3) A CKCF affiliate liaison or designated staff shall attend foundation meetings routinely
- 4) Tagging, sharing and interacting with affiliates on social media is highly encouraged, including sharing post examples

**b. Endowment and Asset Growth**

CKCF and its affiliates will grow assets with particular emphasis on endowed funds. Strategies toward growth include expanding donor development, grant writing, and planned giving efforts.

Foundations may accomplish this by:

- i. Creating and nurturing relationships with prospective and existing donors (individuals, families, and businesses)
- ii. Providing funeral directors, financial advisors, attorneys, and other trusted professionals with information and materials
- iii. Fostering relationships with external funding agents (family foundations, private foundations)
- iv. Encouraging board members and volunteers to use their connections and networks

Some of the ways CKCF, as the host foundation, will support this work include:

- i. Training and guidance on the relational part of development for staff and board members; accompanying affiliate staff and board members on development outreach efforts as needed
- ii. Creating guidelines for fund development activities and targets

- iii. Support external grant applications with technical support and organizational document requirements

**Foundations will demonstrate progress with *Endowment and Asset Growth***

CKCF:

- 1) Provide measurement reports of the annual asset base of endowed funds
- 2) Monitor investment strategies implemented in 2024
- 3) Fiscal management of investment manager performance for greater gain
- 4) Develop performance tools to demonstrate performance based on high and low-performing years (investment and spending combination impact)
- 5) Provide campaign concepts for fund advisors, including affiliate boards, to grow their existing funds
- 6) Establish the Visionary Society and host board and/or community-planned giving education seminars

Affiliate and CKCF Foundations:

- 1) Assist fund advisors in growing asset base on existing funds
- 2) Identify prospective donors for new funds
- 3) Address righting deficit funds (adhere to recommended distribution amounts)
- 4) Evaluate events on cost-benefit before hosting

**c. Local Program/Project Support**

CKCF and its affiliates will continue to pursue innovative and meaningful ways to support local projects and programs that provide quality of life and community pride in areas such as:

- i. Education
- ii. Childcare
- iii. Housing
- iv. Main Street and local business
- v. Disaster response
- vi. Parks and recreation

CKCF and Affiliates may accomplish this through:

- i. Identifying local projects for community needs
- ii. Work in collaboration with other entities on local projects
- iii. Be positioned to support projects outside of the foundation with letters of support

Some of the ways CKCF, as the host foundation, will support this work include:

- i. Access and knowledge of available resources and relevant examples
- ii. Vetting external grant applications and assisting with grant administration
- iii. Establishing campaigns and opportunities in software for tracking short-term to multi-year campaigns
- iv. Supporting diverse campaign approaches that may include grant administration, non-cash gifts, collaborations, etc.

**Foundations will demonstrate progress with *local program/project support***

CKCF:

- 1) Support affiliates with submitting grant applications and grant administration
- 2) Invest Central Kansas program – update materials and integrate into software
- 3) Develop a plan to guide and evaluate projects/programs

CKCF and Affiliates:

- 1) Provide ample time to CKCF to support submission efforts
- 2) Provide letters of support to collaborators
- 3) Confirm alignment with local strategic goals and needs
- 4) Monitor project timeline, establishment to completion
- 5) Ensure that a number of local stakeholders engage in the project/program

## **II. COMMUNITY PARTNERS**

Deepening partnerships for the benefit of diversity involves expanding our reach to ensure all voices are heard from our communities.

CKCF and Affiliates will accomplish this through our work from the board table, from grant-making to project collaboration, we will seek to keep a broad view of community sectors for the engagement work.

### **a. Sector Engagement**

Sectors to consider including are youth, parents, business, media, school, youth-serving organizations, law enforcement, religious or fraternal organizations, civic or volunteer groups, healthcare professionals, state or local agencies, and other local organizations including charities.

### **b. Community Partnerships**

Participating with other sector representatives in serving the community for promotion and awareness, fundraising, and/or general collaboration.

### **c. Project and Grant-Making Support**

Helping to meet the identified needs within a community may involve the local boards referencing community indicators that are available through various studies and resources that identify pertinent data sets that may include:

- i. School enrollment
- ii. Number of childcare facilities, slots
- iii. Number of new houses
- iv. Community health ranking
- v. Poverty levels
- vi. Charities serving diverse needs
- vii. Scholarship funds awarded (percentage of students going into higher education, trending numbers on vocational/trade vs 4-year degrees)

## **III. DASHBOARD MEASURES**

A best practice for monitoring progress includes looking at certain indicators within your foundation. Below are a few examples.

**a. Foundation indicators \***

- i. Total Assets
- ii. Funds by Type
  - Number of funds
  - Amount of assets per type
- iii. Donations
- iv. Planned Gifts
  - Number received
  - Newly established
- v. Grants awarded by SDG goal categories
- vi. Average size of grant awarded
- vii. Growth of endowments
  - Movement toward surplus balances (percent or number) – use baseline 2024, assess 2025)

\* Per affiliate and cumulative

**IV. CKCF AND AFFILIATE COMMITTEE STRUCTURE**

**Affiliates - consider having committees as needed.**

**CKCF Committee Structure**

**a. Donor and Affiliate Relations**

- i. Annual Summit
- ii. CKCF Fundraising
  - Annual Event
  - Giving Tuesday
- iii. Donor Appreciation (All Donors)
  - Thank you notes
  - Philanthropist of the Year at Annual Event
- iv. Volunteer Appreciation
  - Board Members
  - Review Committee Members
  - Volunteer of the Year at Annual Event
- v. Kids FUNd Grant Cycle
  - Grant award

**b. Governance and Compliance**

- i. Policy and Regulatory Procedures
- ii. CKCF Board Recruitment and Support
- iii. Affiliation Regulation
- iv. Compliance
  - Annual Compliance Packet

- Background Checks
- Child Safety

**c. Finance and Investment**

- i. Fiscal Management Oversight
- ii. Annual Budget
- iii. Audit and 990
- iv. Investment and Spendable Policy
  - Surplus – Deficit analysis
- v. Invest CK (possibly be a subcommittee)

**d. Executive Committee - Strategic Development**

- i. Host-Affiliate Model Evaluation
- ii. Human Resources – Support of Operation Administration
- iii. Fund Development
- iv. Planned Giving

**APPENDICES**

- A. Host-Affiliate Roles and Responsibilities
- B. 2023 Affiliate Survey Results
- C. 2023 Affiliate Listening Session Results
- D. 2024 CKCF – Affiliate Summit Notes