CONNECT COMMUNITY FOUNDATIONS ANNUAL CONFERENCE

DMACC Newton Conference Center

600 North Second Avenue West, Newton, IA

September 14, 2017

9:00 am – 9:30 am
Registration Area

Registration and Informal Networking
Light breakfast available

9:30 am – 9:45 am
Auditorium

Welcome and Opening Comments
***Kari McCann Boutell**, President, Iowa Council of Foundation*

9:45 am – 11:00 am
Auditorium

Out of Your Bubble and Into Your Community
***Kris Putnam-Walkerly**, President, Putnam Consulting Group, LLC*

As community foundations and affiliate funds, our greatest insights, ideas, and inspiration often come when we take time to get away from the comfort of our offices, engage people in our community, listen, and learn. Find out how to acquire and engage deep knowledge so you can pinpoint where your dollars, connections, and influence can make catalytic impact. In this keynote you will:

- Discover how developing knowledge and insight into your community or chosen field is essential to figuring out how to use your resources in the most powerful ways.
- Learn practical techniques to scan the landscape and develop insight into priority needs and leverage points for change.
- Find out how to overcome barriers to scanning, including lack of time and fear of being more public as a funder.

11:00 am – 11:15 am

Break

11:15 am – 12:15 pm

Breakout Session #1

Advanced Track: Room 210D
Avoiding 'Delusional Altruism': How to Create a Legacy of Impact, Respect, and Value
***Kris Putnam-Walkerly**, President, Putnam Consulting Group, LLC.*
This provocative session will explore how community foundations can fall prey to "delusional altruism" – unintentionally getting in the way of their own impact and that of grantees – and how simple changes in common processes can instead create practices that are more productive and relevant for all. You'll learn how to recognize ten manifestations of delusional altruism and understand how they hamper progress toward your mission. And, you'll leave with smart ways to avoid pitfalls, increase your impact, improve grantee relationships, and enhance your legacy as a valued community partner.

Fundamentals Track: Room 210B
The Board's Role in Succession Planning
***Bryan Orander**, President, Charitable Advisors*
When an organization has a very small staff or no staff, the board's role becomes even more important to ensure the long-term sustainability of the organization. In this session, Bryan Orander Of Charitable Advisors will focus on developing and sustaining a strong board team in addition to an overview of concepts that will equip you in planning for staff succession in your organization and grantee organizations.

12:15 pm – 1:15 pm **Room 210 A & C**	**Lunch, Networking and CF Snapshot LIVE!: A group of colleagues will share tips and information on a variety of topics of interest to CFs** ***Karla Twedt-Ball****, Senior VP of Programs and Community Investment, Greater Cedar Rapids Community Foundation* ***Nancy Preussner****, Donor Connections Coordinator, Foundation for the Future of Delaware County* ***Laura Booth****, Donor Relations Officer, Greater Cedar Rapids Community Foundation* ***Nicole Brua-Behrens****, President, Greater Poweshiek Community Foundation*
1:30 pm – 2:45 pm **Auditorium**	**Planting Seeds and Growing Gifts: Strategies for Endowment Building in Rural Communities** ***Phil Purcell****, Independent Consultant, Consultant for Philanthropy, LLC.* This session will explain helpful ideas to enhance resource development for endowments such as targeted campaigns, case statements, setting goals, matching gifts, collaboration ideas, donor recognition and stewardship. In addition, specific suggestions will be shared for the important aspects of the who, what, when, where, why and how of successful endowment proposals! Finally, specific tips and talking points for farmers will be highlighted.
2:45 pm – 3:00 pm	**Break**
3:00 pm - 4:00 pm	**Breakout Session #2** **Advanced Track: Room 210B** **Succession Planning and Leadership Transition** ***Bryan Orander,*** *President, Charitable Advisors* Boomers are still retiring and younger leaders are anticipating shorter tenures. You will be seeing some leadership transitions. Join Bryan Orander of Charitable Advisors to explore how you can prepare your organization for a more successful transition – planned or unplanned. Bring your questions and learn from the group and the dozens of transitions that Bryan has helped support. This information will also apply to your grantees. **Fundamentals Track: Room 210D** **Effective Ways to Market to Professional Advisors and Attract More Donors** ***Phil Purcell****, Independent Consultant, Consultant for Philanthropy, LLC.* This session will offer suggestions to enhance your work with professional advisors to support the community foundation. Ideas for creating a list of who to contact and understanding their interests will be explored. You will learn helpful ideas for educating, involving and serving advisors. This interactive session will encourage questions and good ideas from the audience.
4:00 pm - 4:30 pm **Auditorium**	**Legislative Update** + **Closing Announcements + $250 Mini-Grant Drawing Announcement** Complete evaluations, mileage forms and Idea Implementation Grant forms Each attendee can enter to win one of four, $250 mini-grants to be used for promotion of their affiliate or community foundation. An entry form can be found in your conference folder. Award recipients must be present to win and will be asked to report to ICoF how they have used the grant funds.

** This event is sponsored in part by the Iowa Economic Development Authority.*

SESSION SPEAKERS (IN ALPHABETICAL ORDER)

Bryan Orander

Bryan is founder and president of Charitable Advisors. After 18 years of for-profit leadership in the Fortune 50 business world and a disability-related nonprofit, Bryan joined a large regional accounting and consulting firm. In 2000, he founded Charitable Advisors with the vision of going beyond traditional consulting to become a connector, advocate and problem solver for the nonprofit sector. In addition to creating and publishing the Not-for-profit News, an e-newsletter for 14,000 subscribers in Central Indiana, Bryan co-founded "Get on Board," an annual board member recruiting event hosted by Leadership Indianapolis. In 2010, Charitable Advisors published the first Central Indiana Nonprofit Salary Survey. In 2008, he began publishing the Greater Cincinnati Not-for-profit News, which since August 2015 became a local, independent publication.

Phil Purcell, *CFRE, MPA/JD*

Phil teaches courses on Law and Philanthropy, Nonprofit and Tax Exempt Organization Law and Planned Giving as adjunct faculty for the Indiana University School of Law (Bloomington) and Indiana University Lilly School of Philanthropy and Fundraising School (Indianapolis). Phil serves as a member of the Tax Exempt Organization Advisory Council for the Internal Revenue Service (Great Lakes states) and has served on the board of directors for the Partnership for Philanthropic Planning and Association of Fundraising Professionals Indiana. He is an attorney and member of the American and Indiana State Bar Associations. Phil received his B.A. degree from Wabash College and his J.D. and M.P.A. degrees from Indiana University.

Phil provides guidance on the federal law of philanthropy and tax exempt organizations including community foundation qualifications, governance, types of funds, fund agreements, planned giving (including gifts and assets), donor advised funds, scholarship programs, fiscal sponsorship, disaster relief, supporting organizations, program related investments, unrelated business income tax, lobbying, and more. He is a community foundations national standards reviewer and a Certified Fundraising Executive with over twenty years of fundraising experience on behalf of all types of organizations, including community foundations. Phil is a licensed attorney in Indiana. While is not licensed in other states, and state laws can vary, he is able to provide expert guidance on the Uniform Prudent Management of Institutional Funds Act, Model Nonprofit Corporation Act, unincorporated associations, charitable trust law, benefit corporations, state fundraising registration, charitable gaming, and other applicable state laws.

Kris Putnam-Walkery

For over 18 years, top global philanthropies have requested Kris's help to transform their giving and catapult their impact, including designing strategies that achieve results, streamlining operations, assessing impact, and allocating funds. Her clients include the Robert Wood Johnson, David and Lucile Packard, Avery Dennison, Annie E. Casey, Charles and Helen Schwab, and Walton Family foundations, among dozens of others. She's helped over 60 foundations and philanthropists strategically allocate and assess over $350 million in grants and gifts.
A thought leader in transformative philanthropy, Kris was named one of America's Top 25 Philanthropy Speakers in 2016 and in 2017. She is the author of *Confident Giving*, which was named one of the 10 Best Corporate Social Responsibility Books, and chosen as a finalist in the 2017 International Book Awards. She is a frequent contributor in the publications of leading philanthropy associations. Kris chairs the board of the National Network of Consultants to Grantmakers and serves on the board of the Community Foundation of Lorain County and the Advisory Committee of the Foundation Center in Cleveland.

Prior to forming Putnam Consulting Group, she was a grantmaker at the David and Lucile Packard Foundation and an evaluator at the highly esteemed Stanford University School of Medicine. Kris holds a master's degree in social work from San Francisco State University and a bachelor's degree from Indiana University.

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