

Learning to Lead

*The Journey to Community Leadership
for Emerging Community Foundations*



Community leadership

means many things. Strengthening nonprofits. Tackling hot issues. Connecting key players. All of the above and more. As they set and test their leadership strategy, emerging community foundations find special challenges and rewards — and an extraordinary opportunity to define themselves.

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Additional community leadership stories

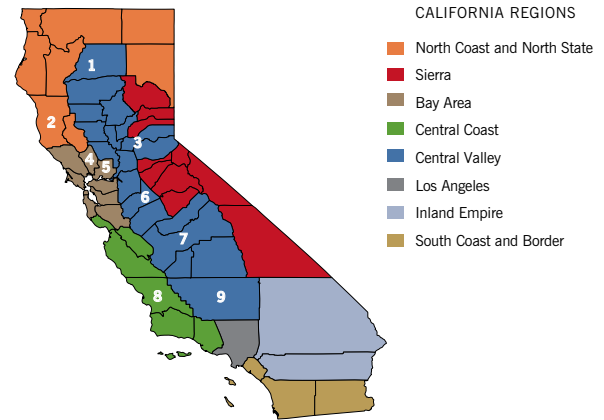
- Helping Boost Philanthropy and Nonprofit Effectiveness
- Making Connections to Achieve Tangible Results
- Responding to Rising Needs

Video on Learning to Lead

Customizable tools

PROJECT PARTICIPANTS

The content in this paper has been developed through the experiences of a group of participants in The James Irvine Foundation *Community Foundations Initiative II*.



Community Foundations Initiative II Sites

- Shasta Regional Community Foundation
Redding, California
- The Community Foundation of Mendocino County
Ukiah, California
- Placer Community Foundation
Auburn, California
- Napa Valley Community Foundation
Napa, California
- Solano Community Foundation
Fairfield, California
- Stanislaus Community Foundation
Modesto, California
- Fresno Regional Foundation
Fresno, California
- San Luis Obispo County Community Foundation
San Luis Obispo, California
- Kern Community Foundation
Bakersfield, California

Additional Inputs

Leaders of the following community foundations and associations vetted this paper and contributed inputs prior to publication.

- Barry Community Foundation (MI)
- Community Foundation for Northeast Michigan (MI)
- Community Foundation for Palm Beach and Martin Counties (FL)
- Community Foundation of Broward (FL)
- Community Foundation of South Jersey (NJ)
- Grand Haven Area Community Foundation (MI)
- Greater Everett Community Foundation (WA)
- Iowa Council of Foundations
- La Crosse Community Foundation (WI)
- Maine Community Foundation (ME)
- Parkersburg Area Community Foundation (WV)
- The Denver Foundation (CO)

Foreword

We believe that a community foundation's value derives from its dual capacity to shine a light on issues of critical, local importance and to attract local resources to meet those needs. Because of their unique connection to donors, nonprofits, local policymakers and residents who care deeply about the community, they are often well positioned to tackle issues of vital significance to the community.

For these reasons and more, The James Irvine Foundation has a long history of partnering with community foundations in California. From 2005 to 2011, we worked closely with a set of young and small organizations through our *Community Foundations Initiative II*. We supported these emerging community foundations, located in rural and under-resourced regions of California, in their efforts to become more robust local philanthropies, investing \$12 million to accelerate their growth and leadership potential.

We learned that it is not just larger community foundations, with relatively ample operating budgets, that can play important community leadership roles. Through the creativity and ingenuity of our partners across California, we have seen how community foundations of all sizes can play meaningful leadership roles in their communities. This report offers insights and experiences along a spectrum of roles pursued over the life of this initiative. Included are stories revealing their individual trials and triumphs on the road to community leadership, as well as tools for use by others in the field.

We are grateful to the staff at FSG, who evaluated this initiative, for capturing this information and drawing out lessons learned from a cohort of inspirational leaders. In creating this report, we hope to share these lessons in a way that is helpful to other community foundations, and community foundation funders, within California and beyond. We salute the participants in this initiative for their courage and commitment to play a critical leadership role in their communities, as this work is both challenging and essential to a vibrant, inclusive society.



James E. Canales

President and Chief Executive Officer
The James Irvine Foundation
April 2012

Context

Community Foundations Initiative II

The James Irvine Foundation launched its *Community Foundations Initiative II* in 2005. This six-year effort involved a \$12 million investment to accelerate the growth and leadership of a set of small and young community foundations in rural areas of California. The initiative provided three types of support:

- Direct grants for core operating support and self-identified projects to build infrastructure
- Regranting funds for Youth or Arts programs to help develop grantmaking capability
- A strong program of technical assistance as well as a learning community to help community foundations gain from each other's successes and challenges; this included twice-yearly convenings of board and staff leaders from all participating community foundations

The cohort of seven community foundations participating in the initiative between 2005 and 2011 grew their collective assets 12 percent annually (going from \$73 million to \$131 million), compared to 7 percent for their peer group nationally. They increased their collective annual grantmaking by about \$4 million over this period (not counting Irvine regrant dollars). And they have made important progress as leaders who initiate action to address unmet needs in their communities.

COMMUNITY FOUNDATIONS SERIES

This initiative has generated a significant body of knowledge that can benefit the larger field of community foundations, and that holds particular relevance for the youngest and smallest members of the field. This information is captured and shared through the Irvine Community Foundations Series.

2007



Growing Smarter
Achieving Sustainability in Emerging Community Foundations

2011



The Four Ps of Marketing
A Road Map to Greater Visibility for Community Foundations

2011



Reaching Out
Board Ambassadors for Growth in Community Foundations

2012



On Board
Engaging the Full Potential of Community Foundation Directors

2012



Learning to Lead
The Journey to Community Leadership for Emerging Community Foundations

2012



Sizing Up
Strategies for Staffing Emerging Community Foundations

Visit www.irvine.org/communityfoundations to download these publications, view videos, read additional case studies and access customizable tools.

Introduction: The Path to Leadership

Becoming a recognized leader is both a destination and a journey for emerging community foundations — younger and smaller organizations poised for rapid growth. The path can be shaped by each foundation's experience, available resources and most pressing local issues. It might involve providing support to the nonprofit community in a new way, raising visibility and shining a light on important needs or bringing together key players to focus on complex challenges. For some, the journey involves becoming a highly sought-out resource, resulting in tough choices about which community leadership requests to consider.

This report presents community leadership lessons distilled from the experience of *Community Foundations Initiative II* participants. These lessons are followed by a set of stories of leadership demonstrating how these organizations have navigated the journey — including ways they have faced the reality of limited resources, concerns about finding an issue that won't alienate others and the difficulty of turning down requests to lead. It also illustrates how the process has helped them forge a new identity as local leaders. The document concludes with tools to help other community foundations begin to plan their own leadership journeys.

lead·er·ship, *n.*

Exercising influence, mobilizing others, acting to address an unmet need, provoking new understanding, inspiring confidence.

VOICES OF EXPERIENCE

This report is drawn from insights shared by community foundation board and staff members, as well as other local leaders listed here.

The Community Foundation of Mendocino County

Claire Ellis, former Board Chair
Greg Jirak, Mendocino Broadband Alliance
Strategic Planning Committee
Jim Mayfield, Board Chair
Jim Moorehead, Board Member
Susanne Norgard, Executive Director

Fresno Regional Foundation

Dan DeSantis, CEO
Bill Lucido, former Board Chair

Kern Community Foundation

Mary Bynum, Vision Committee of the Women's and Girls' Fund
Pam Fiorini, Executive Director, Golden Empire Gleaners
Judi McCarthy, former Board Chair
Jeff Pickering, President

Napa Valley Community Foundation

Mary Butler, Chief, Napa County Probation Department
Diana Dorame, Executive Director, Legal Aid of Napa Valley
David Gaw, Board Member
Kris Jaeger, Board Chair
Terence Mulligan, President

Placer Community Foundation

Jeff Birkholz, Board Chair
Veronica Blake, CEO
Ruth Burgess, Board Member
Gail Catlin, Director, Nonprofit Resource Center

San Luis Obispo County Community Foundation

Wendy Brown, former Board Member
Rick London, CEO of the United Way of San Luis Obispo County
Barry VanderKelen, Executive Director

Shasta Regional Community Foundation

Kathy Anderson, former CEO
Kerry Caranci, former Interim Executive Director
Beth Freeman, Director of Community Programs
Ann Kaster, former Board Member
Larry Lees, County Administrative Officer

Considering the Journey

Pursuing a leadership role can create benefits for both community foundations and the communities they serve, but becoming a leader can be uniquely challenging for a younger or smaller organization.

COMMUNITY FOUNDATIONS HAVE MUCH TO OFFER

Uniquely positioned locally, community foundations have an opportunity to lead in ways that others cannot. In exercising this leadership, they offer their communities:

Knowledge. The daily work of community foundations gives them a special vantage point on community needs and opportunities. Many augment this organic knowledge development by actively seeking quantitative and qualitative data. This information has value for others who seek to act in the interest of community.

We're not just a trusted philanthropic leader. We own knowledge — we can do all sorts of things to help people understand the nonprofit sector. — Jeff Pickering

Connections. Community foundations serve a broad mission, often spanning wide geographies and many issue areas. This reach gives them a natural ability to connect people and resources, helping create or enhance solutions.

We know all the players from our grantmaking. A lot of people have leadership in their own communities, but the county-wide aspect of the Foundation is not duplicated. — Susanne Norgard

If there is a job to do, and no one has the money or energy to do it, people will call us. And if we can't do it, we will put together a group that can. — Wendy Brown

Influence. As even-handed actors, community foundations can form and advance collaborations that might flounder if other groups were to attempt them.

The Foundation has the cachet, credibility and respect to be able to bring together diverse groups — from law enforcement, to the folks at the jails, to elected officials, to Legal Aid and other nonprofits. The Community Foundation brought together disparate viewpoints, and they have the respect of all the key participants. It makes all the difference, because individually, we might not have these conversations. — Diana Dorame

COMMUNITIES AND THEIR FOUNDATIONS HAVE MUCH TO GAIN

Community foundations that assume leadership roles can create benefits for their communities and their own organizations. By leading, community foundations can increase their:

Impact. Leadership represents an opportunity to create impact in new ways.

The Foundation was a founder of the Broadband Alliance and has played a key role in its development. Their continuing influence has been a tremendous benefit. Without the Foundation, we would likely not have a viable alliance. — Greg Firak

Credibility. Leadership activities and accomplishments can establish credibility in the community.

Our first project, helping to create the Veterans Cemetery in our early days, helped to create credibility for the Community Foundation, and it created public awareness, because it was something the community cared about so much. — Beth Freeman

Visibility. Leadership can dramatically increase an organization's visibility and profile, attracting donors and resources.

*The visibility of the Foundation has increased. It ends up making people more aware of us. And we recently were approached by the County, and ended up getting a contract to administrate a grant program on their behalf!
— Veronica Blake*

VANTAGE POINTS: WHAT LEADERSHIP FEELS LIKE AND LOOKS LIKE

Community foundations engaging in community leadership say that it's as much about the organization's actions as it is about the perceptions of others.

What a community foundation does

As a community leader, we bring attention to, and rally resources around, vexing problems that affect a significant portion of our service area. — Barry VanderKelen

Our knowledge is a key component of being a community leader — we are aware of the needs of the community. We're the center of the hourglass. We connect resources with people who need them. — Jeff Birkholz

It means finding things that are relevant and important to work on and leveraging your entire toolbox — grant dollars, convening, persuasion — to benefit specific issues. It's hopefully in partnership with others, because that leads to better results. We are thoughtful, courageous, willing to talk about things that others may not want to talk about, open to other people's views, transparent and accountable. — Terence Mulligan

It means being an expert about something, such as providing sector-specific knowledge, becoming a resource on nonprofit excellence or providing technical assistance. — Judi McCarthy

You must be knowledgeable and engaged, and an advocate, progressive and moving forward. You are not a leader if you have to say you are one. And no one does it alone! A community foundation can be more visionary than others, because you have both assets and knowledge. — Dan DeSantis

How a community foundation is viewed

*It's recognition that the Foundation is an honest broker, and is not factionalized. It's getting people to understand that role, and getting them to see us as a facilitator of a discussion, rather than just a source of money.
— Jim Mayfield*

The Community Foundation is seen as something steady and stable, and has persevered through some difficult times. When everyone was saying the sky is falling, we rode out the waves. We're trusted. — Kathy Anderson

The community now knows the Foundation from its community leadership work. We didn't have a county-wide presence before. Now, other nonprofits see us as a neutral party that doesn't have vested interest in getting money.
— Ruth Burgess

Because of our work in nonprofit capacity building, we're now really seen as a nonprofit resource in a way that we wouldn't have been before. — Veronica Blake

THE CHALLENGES LEADERS FACE

While a community foundation can achieve important benefits for itself and the community it serves, the leadership role is not without its challenges. When formulating a new leadership strategy, community foundations should consider the following common concerns:

Limited time and money. Acting as a community leader can be difficult with the resource constraints and competing priorities faced by a newer foundation. Given limited staff and grantmaking dollars, along with the ever-present need to grow the foundation, becoming a community leader can seem like a herculean task.

We did a long-range strategic plan, and ended up with five areas of focus — for community leadership, we said we needed to pull in the reins, because we were going to overextend ourselves. It was too much. — Dan DeSantis

Confused identity. The risks of shifting strategy and causing shifts in perception are real. Some emerging community foundations become identified with the issues they take on, narrowing their role in the minds of important stakeholders.

One way we really defined ourselves as leaders was by creating this endowment for the arts in partnership with others, but because of our work on the arts, we were branded as an arts organization. I remember going to meetings, even recently, and having to say that the arts is just one piece of what we do. Making grants and participating in activities outside of the arts sector helped to change that perception, and our leadership summit helped clarify the Foundation's role as a supporter of the nonprofit sector as a whole. — Veronica Blake

Increased scrutiny. Taking on a community leadership role can elevate the visibility of the community foundation — and the scrutiny it is subject to. This makes it extremely important to execute well.

When you are defined as a community leader, that's when all the arrows can come at you, because leadership puts you in a very exposed position. The byword in our decision making process is, "Can this be in the newspaper?" If it can, and no one will question it, we will go forward. — Claire Ellis

Political controversy. Taking a position on hot-button issues has the potential to create distance between the foundation and partners or segments of the community.

We've struggled with this because as soon as you proclaim yourself as a leader, and take positions on issues, it can be a dangerous endeavor, or become a political storm. We chose to take on a leadership role in getting broadband, since half the people in the county don't have a connection. It was important to everybody, and frankly, who is against that? — Jim Mayfield

Donor alienation. Some donors may not agree with a leadership position taken by the community foundation. Such disagreements may have negative consequences for donor giving.

We wanted to look soberly at the risks and acknowledge them — including the potential of alienating donors, which is real. — Terence Mulligan

Uncertainty and apprehension. It takes time and clarity of purpose to nail down a leadership strategy that makes sense for the community foundation and community. The strategy adoption process may include allaying fears and communicating the potential benefits to apprehensive board and staff members.

Helping the board to recognize the position they are in, the power they have, and how to use it wisely — it's a struggle. We had one issue where another nonprofit was giving micro loans to small farmers, and they wanted to borrow \$1 million. Our board really struggled with whether it was the role of the Foundation — it took us over a year to make the decision. But we did it, and were the first community foundation in the state to do something like this! — Dan DeSantis

MORE ADVICE FROM COMMUNITY LEADERS

A single community foundation can't do everything all at once, or ever. It's important and wise to go at your own pace and establish boundaries along the way.

Setting expectations

- Be ready to say “no” if a community leadership opportunity isn't right for your organization
- Remember, leadership is a learning process of defining, acting, adjusting and repeating
- Leadership takes time — organizations don't assume this role overnight
- Results reinforce one another; visibility and credibility lead to new opportunities and new questions about what to do next

Funding the work

- Checking in with significant donors as you consider embarking on a new action can help you gauge whether an issue has the potential to be off-putting, while also testing for interest in giving to your leadership work
- Recognizing where interest already exists may help you prioritize or initiate leadership action; for example, Kern Community Foundation was able to tap into the passion and philanthropy of a set of community leaders to establish a successful Women's and Girls' Fund
- Being intentional in defining the amount of discretionary resources to allocate to leadership action (via grants or other investments) is important to maintaining what your organization identifies as an appropriate mix of programmatic support for community needs
- Making sure that board and staff have a clear understanding regarding the time required to advance leadership in an issue area is vital; this understanding should extend to knowing what won't get done in order to pursue leadership, and it should include considering ways board members can supplement staff by helping with leadership activities.

Stories of Leadership

This section shares the stories of real community foundations and the journey to define and embrace community leadership on their own terms. Find additional stories at www.irvine.org/communityfoundations.



TAKING TIME TO PICK THE RIGHT PROJECT THE COMMUNITY FOUNDATION OF MENDOCINO COUNTY

This community foundation drew on initial experimentation with leadership to pursue collaboration in the arena of economic development, helping create a new multi-sector alliance focused on ensuring internet access for all segments of the county.



HARNESSING THE POWER OF HUMAN CAPITAL PLACER COMMUNITY FOUNDATION

This community foundation paved the way for greater impact by building the capacity of local nonprofits and playing convener and facilitator roles — activities that require little money but a great deal of staff time.



LEADING ON A CHARGED ISSUE NAPA VALLEY COMMUNITY FOUNDATION

Determined to be more than a philanthropic services provider, this community foundation explored serious unmet needs and chose to take on a potentially controversial issue around social justice and immigrants, facilitating conversations among local nonprofits, law enforcement agencies and others.



FINDING THE RIGHT NICHE SHASTA REGIONAL COMMUNITY FOUNDATION

After a successful hands-on intervention helping a veterans group fundraise for their cemetery, this community foundation received many requests for similar support. In response, it set criteria for future leadership engagements and now reserves its involvement for roles other groups can't play.



View these additional stories online at www.irvine.org/communityfoundations:

Helping Boost Philanthropy and Nonprofit Effectiveness

Making Connections to Achieve Tangible Results

Responding to Rising Needs

TAKING TIME TO PICK THE RIGHT PROJECT

THE COMMUNITY FOUNDATION OF MENDOCINO COUNTY

This community foundation drew on initial experimentation with leadership to pursue collaboration in the arena of economic development, helping create a new multi-sector alliance focused on ensuring internet access for all segments of the county.



Tim Hauf Photography www.timhaufphotography.com

Not quite 15 years after it was founded, [The Community Foundation of Mendocino County](#) faced a challenge: “More opportunities were popping up to be involved, and we needed to find a way to prioritize and focus,” recalls Susanne Norgard, the Executive Director.

In response, the Community Foundation began several years of exploring and experimentation. “We started off trying to run a Safety Net convening. It didn’t work well,” says Norgard. Since then, “our thinking has changed quite a bit.” The Community Foundation began looking at leadership as bringing the right people to the table and looking for the right solutions together. “What is different now is that we’re not going to the table by ourselves,” says Norgard. “We’re saying, ‘We will come, but only if you come, and bring something.’ It’s maneuvering so that people come together.”

Data also played a role in driving the Community Foundation’s leadership strategy. “What we looked at was informed by our community asset survey. It focuses our work,” says Norgard. The Community Foundation began to analyze various issues important in the county it serves. “It started with a strategy discussion,” she recalls. “The county needs jobs, income and a tax base. As a community foundation, how do we develop that? We took the time to understand where we could play a role and ended up grappling with those questions for a year.”

The county needs jobs, income and a tax base. As a community foundation, how do we develop that? We took the time to understand where we could play a role and ended up grappling with those questions for a year.

*Susanne Norgard, Executive Director
The Community Foundation of Mendocino County*

A pivotal, and addressable, challenge that surfaced from this exploration involved the need for broadband internet access across this vast, thinly populated, low-income county. “We realized that broadband was really going to impact economic development in Mendocino County,” says Jim Moorehead, Community Foundation Board Member and Chair of the new Broadband Alliance that resulted from the Community Foundation’s leadership. “We needed to start looking at this as a leadership challenge in the county, because if we don’t step in to help solve the issue, it will never happen.”

The Community Foundation considered focusing on other needs, such as water usage, but the board had concerns about entering into potentially polarizing issues. “Broadband was more manageable and less political than some of the other issues we looked at,” says Norgard, “and it was a good place to put our toe in.”

The issue was also critical to the future economic health of the county. “It is connected to everybody, and honestly, we will become like a third-world country if we don’t have that infrastructure,” says Jim Mayfield, Community Foundation Board Chair. The urgency of this need was demonstrated when the south coast branch of the county library and a number of local businesses lost their internet connections when the only internet company offering service in the area went out of business.

The Community Foundation built on the work of a smaller group that had been looking at the issue, and helped convene key players to move the discussion forward. “We brought people together from the county, Native American tribes, different outlying communities, the Economic Development and Financing Corporation, and county officials,” says Norgard. “And the committee is really making strides. We made it happen, and now it has a life of its own.” In addition to helping to convene and facilitate the group, the Community Foundation also offered a \$40,000 matching grant to incentivize donors.

The new entity that emerged — the Broadband Alliance of Mendocino County — has made great progress, most recently participating in a consortium applying for a \$450,000 grant from a government agency. “Often, small counties like Mendocino don’t have the capacity even to investigate or apply for grant opportunities,” says Greg Jirak, Chair of the Alliance Strategic Planning Committee. “If the Broadband Alliance hadn’t been in place, Mendocino County would not have been able to apply for the California Advanced Services Fund grant that we recently received. The Foundation should receive a great deal of credit for this money flowing into the County.”

The work of the Community Foundation on this issue has also led to visibility. As Moorehead says, “Today, people know about the Foundation. When I joined the board, people didn’t know who we were.”

The respect the Community Foundation gained through the broadband work has led to some difficult new choices about what it can and cannot take on. When approached by a group requesting help facilitating partnerships between the county and local nonprofits, the Community Foundation decided not to participate, due to staffing constraints and concerns about diluting the organization’s focus. “We decided it wasn’t the right place for us,” says Norgard. “There were significant opportunity costs of putting a lot of energy into yet another thing. There was a threat of overextending our capacity because we have such a tiny staff, and of being identified with something that’s not our primary focus.” Consequently, the Community Foundation has learned to turn down requests that do not fit with its strategy or that would require too much capacity.

We’ve said no to a number of requests that didn’t fit with what we were doing, or when we didn’t have the staff. You have to be able to say no.

*Jim Moorehead, Board Member,
The Community Foundation of Mendocino County*

Leaders of The Community Foundation of Mendocino County continue to wrestle with the question of where to engage as they move forward, but they see a clearer focus that includes a number of potential roles. “For areas where we have decided not to wade in and actively broker and convene, the Community Foundation can provide information and training, or help in other ways,” says Norgard. “We see ourselves above all as building community knowledge and capacity.”

HARNESSING THE POWER OF HUMAN CAPITAL

PLACER COMMUNITY FOUNDATION

This community foundation paved the way for greater impact by building the capacity of local nonprofits and playing convener and facilitator roles — activities that require little money but a great deal of staff time.



[Placer Community Foundation](#) entered active leadership by taking on a critical issue that affected its nonprofit constituents — capacity building. As CEO Veronica Blake says, “It was broad-reaching, and cut across issue areas to impact all the nonprofits we were trying to serve. We felt like we had limited resources, so this was where we could have the most impact!”

Board and staff also viewed building nonprofit capacity as a farsighted step. “We thought about the future, when we would have more grantmaking dollars,” says Blake. “By doing this capacity-building work in the early stages of our lifecycle as a foundation, the nonprofits in our community will be stronger when we have the resources to invest in them.”

Staff has found this work to be time-intensive, but crucial — both for the nonprofits served, and the Community Foundation itself. “I’m good at saying, ‘We don’t have any money, but I’m happy to brainstorm ideas with you,’” says Blake. “I don’t know how relevant we would be in the community at this point if we weren’t doing this work, since we’re not giving a lot of money away.”

We thought about the future, when we would have more grantmaking dollars,” says Blake. “By doing this capacity-building work in the early stages of our lifecycle as a foundation, the nonprofits in our community will be stronger when we have the resources to invest in them.

*Veronica Blake, CEO
Placer Community Foundation*

Even so, board and staff had concern about maintaining a time-intensive, hands-on approach to capacity building as the organization grows. “I don’t know how it will be sustainable as we get larger,” says Blake. The organization began addressing this concern by offering small grants for nonprofits to hire consultants to play the role previously handled by Community Foundation staff.

Over time, the organization has moved from individual capacity building to creating capacity-building opportunities for groups. “We got so many requests from nonprofit board members to help build their capacity that we convened a leadership summit,” says Blake. The response to the Community Foundation’s initial foray into large-scale capacity-building efforts was outstanding.

Board members and executive directors of more than 30 local nonprofits participated, and found the day to be immensely helpful; attendees gave the speakers a standing ovation at day's end. Placer Community Foundation's nonprofit capacity-building endeavors have also resulted in positive external recognition, including an award for being an outstanding grantmaker in the Sacramento region.

The Community Foundation assumes that its leadership activities carry a measure of risk, and not all have been successful. Blake says, "We had some capacity-building work that was a bomb. There have been times where the organization isn't ready for that work. But the wins have more than made up for the losses."

The work of strengthening local nonprofits has led Placer Community Foundation to become involved in other projects. The Placer Collaborative Network, an organization of nonprofits, requested the Community Foundation's assistance in acting as a fiscal agent and facilitator. Executive Director of the local Nonprofit Resource Center, Gail Catlin, says, "The Foundation provides a convening center for the whole endeavor to take place. I think the collaborative would be much more vulnerable without the Foundation." Indeed, over the years, Placer Community Foundation's involvement has helped to sustain the collaborative. "With the leadership transitions, I think the Collaborative Network would have just dissolved if the Foundation had not gotten involved," says Ruth Burgess, a Community Foundation Board Member.

Recently, the Community Foundation has partnered with several local health care providers to launch a transport program to help seniors get to medical appointments. "We acted as the facilitator and motivator to bring all parties to the table and ask people to contribute to the issue," says Burgess. This Community Foundation action resulted in major dividends for the community. "It just took our time to coordinate it — we didn't need to put any money into it at all," says Blake.

The Community Foundation's time is its biggest concern when assessing a new project, and at points the time required is too much.

The board always asks what the impact will be on staff time.

*Ruth Burgess, Board Member
Placer Community Foundation*

For example, the County Health and Human Services agency received funds for preventive mental health services and began searching for a new partner to help it be innovative with its approach. The agency director was aware of Placer Community Foundation's work in the Placer Collaborative Network, and requested assistance. The Community Foundation agreed. While the project itself was a rousing success, it also strained resources. "It was labor intensive, and required a huge amount of staff time," says Burgess. Still, both the nonprofit community and the Community Foundation reaped rewards from the process. Burgess says, "The County had no way to know about all these small, grassroots organizations that were focused on prevention. It's opened up a whole new world to them." Board Chair Jeff Birkholz says, "The visibility of the Foundation has increased because of it. It ended up making people more aware of us."

While the Community Foundation has invested some grant dollars in leadership work, its financial investment is relatively small. "The capacity-building work, participating in the Collaborative Network, etc., are all inexpensive in terms of grant dollars," says Blake. "Showing up at meetings and advocating for what needs to happen here can influence something good... so that's worthwhile. And we're now really seen as a resource in a way that we weren't before we began this work." By investing time in meeting the needs of the community, the Community Foundation has created a lasting impact not possible with grant dollars alone. Blake says, "The financial resources are important, but having people with energy, and who are plugged into different networks, makes all the difference."

LEADING ON A CHARGED ISSUE

NAPA VALLEY COMMUNITY FOUNDATION

Determined to be more than a philanthropic services provider, this community foundation explored serious unmet needs and chose to take on a potentially controversial issue around social justice and immigrants, facilitating conversations among local nonprofits, law enforcement agencies and others.



[Napa Valley Community Foundation](#) began pursuing leadership with an intent to increase visibility among donors, but the journey led to a decision to focus on social justice for immigrants in Napa Valley. Staff and board created an ambitious agenda designed to leverage the Foundation's ability to grow relationships and use the goodwill it has built up throughout its region.

CEO Terence Mulligan explains, "At the beginning, we really thought the most important thing was our solemn duty to execute the diverse intentions of local philanthropists. But then we realized, if all we're doing is running donor advised funds and scholarships, with no discretionary dollars or convening or influence, then we should just give our funds to Fidelity. Helping others achieve their charitable goals is gratifying, but doesn't often lead to real social change." This realization inspired the board and staff to begin looking at the deep-seated needs of Napa County.

The Community Foundation was deliberative as it determined which issue to take on. "At the very beginning, we were casting about because we were looking for a way to use our convening power for good," says Mulligan. "We assessed: Where are there needs? What is not getting attention from others? For example, we didn't focus on education because others were focused there."

We don't see anyone taking up the dialogue. Our county is 35 percent Latino... and we want to be closer to that community.

*Kris Jaeger, Board Chair
Napa Valley Community Foundation*

After an inspirational board retreat that included a conversation with Arizona State Senator Kyrsten Sinema, the board and staff decided to focus on aiding underserved immigrant populations in Napa Valley. "In the next 25 years, we will become majority Latino," says Mulligan. "Our economy depends on the labor of the people who pick our grapes and work in our hotels and restaurants." Some board members were initially reticent about tackling such a charged issue, but because the Community Foundation was so well positioned as an even-handed convener, thanks to the reputations of board and staff members, the organization decided to push forward to help the community find common ground. As Mulligan puts it, "We can't fix Washington. No matter what your politics, you can acknowledge that the system is broken — a whole series of things are screwy. So the question then becomes, what can we do together to make a difference in Napa County and make it better for everyone?"

This strategy is not without some big potential pitfalls. Community Foundation staff and board shared concerns about alienating current or potential donors through stepping into a politically charged issue.

A number of these community groups wouldn't be talking together if the Foundation hadn't initiated the conversation.

Mary Butler
Chief, Napa County Probation Department

Before embarking on this path, the Community Foundation approached several donors to vet the idea and received a positive response. These conversations helped the board become comfortable with the risk and reinforced their desire to respond to a need not addressed by other community players. According to Kris Jaeger, Board Chair, “We don't see anyone taking up the dialogue. Our community is 35 percent Latino... and we want to be closer to that community.”

To date, the Community Foundation has hired the Migration Policy Institute to write a white paper on the economic and fiscal impact of immigration in Napa County, and it is conducting a series of convenings focused on the law enforcement climate. “We're starting a conversation about the fear that can be created when federal immigration authorities deport people much more routinely from our County Jail,” says Mulligan.

The community is responding with appreciation for the organization's work on this issue. Mary Butler, Chief of the Napa County Probation Department says, “Without the Foundation, these discussions would not be happening. The criminal justice departments get together and talk about who belongs in jail and who doesn't, but not from an immigration standpoint. And a number of these community groups wouldn't be talking together if the Foundation hadn't initiated the conversation.”

Diana Dorame, executive director at Legal Aid of Napa Valley says, “We had some meetings with county officials, and hit a roadblock — the Foundation was able to bring people back to the table. Even if we disagree, the Foundation keeps us working and talking together. The meetings have resulted in us understanding law enforcement's position better, and them understanding ours. And now we are all thinking together about how we can be more proactive about this issue.”

FINDING THE RIGHT NICHE

SHASTA REGIONAL COMMUNITY FOUNDATION

After a successful hands-on intervention helping a veterans group fundraise for their cemetery, this community foundation received many requests for similar support. In response, it set criteria for future leadership engagements and now reserves its involvement for roles other groups can't play.



When one issue dominated the local papers, staff and board members at [Shasta Regional Community Foundation](#) took note. Kathy Anderson, former chief executive explains: “The Foundation board and staff were following an issue... about our veterans who had been trying to get a veterans cemetery for 16 years. They were guaranteed one, but after lots of political wrangling, although the state paid for the cemetery, they weren't going to water it! The whole project got bogged down. We were frustrated that it came down to something as simple as turning on the water.”

The Community Foundation decided to take action, and began by contacting state and local officials. When that didn't work, they reached out directly to the veterans group and offered their assistance. Working behind the scenes, the Community Foundation helped the veterans start a committee, access meeting space, set up a website and begin fundraising. In nine months, the veterans group raised \$270,000 and the cemetery became a reality. Shasta County Administrative Officer Larry Lees says, “The Foundation's expertise was a critical component of their success. The veterans cemetery just would not have happened without it.”

Throughout the effort, the Shasta Community Foundation maintained a low profile and savored the learning experience. “It put us in such a different place,”

says Anderson. “We developed the skills to work effectively with different groups, and with the community.”

When the development of a Lowe's store included \$1 million earmarked for affordable housing, community leaders and the city of Redding turned to the Community Foundation for assistance. “We were being asked by community leaders to create this fund,” says Anderson. “We created an advisory committee, and brought a number of banks and a home builder to the table to talk about how to structure it.” While the fund unfortunately stalled due to the housing crisis, the experience increased the Community Foundation's credibility in the community. “We were seen differently because of our work on the fund,” says Anderson.

Our first leadership project put us in such a different place. We developed the skills to work effectively with different groups, and with the community.

*Kathy Anderson, former CEO
Shasta Regional Community Foundation*

With greater visibility, the Community Foundation began receiving regular requests — and had a hard time saying no to projects. “For a while there, we took on whatever people brought to us,” says Ann Kaster, a former Board Member. One of the organization’s attempts at community leadership did not pan out, but helped inform decisions about what to take on in the future. Beth Freeman, Director of Community Programs, recalls: “We got involved with trying to save a historic church in the community. We got a grant, and spent a huge amount of time on the effort to save it. Then, at the end, the project broke down because of one of the other players. Because of that experience, we’re now more cautious about what we take on.”

Freeman says, “It’s an ongoing discussion — how far do we go into community leadership when we already have our plates full?” The Community Foundation winnows down numerous requests by assessing fit with its role and its resource constraints.

For the most part, if someone else can take on that role, we don’t. There is no reason for us to step in if someone else can to it.

*Beth Freeman, Director of Community Programs
Shasta Regional Community Foundation*

For example, the local arts council asked for help to convene people to discuss usage of a local park, but the Community Foundation did not have the staff capacity. “With the time that it would take, the people who needed to be involved and the timing, it just was not going to work out. We made some calls, connected them with the right people and then we stepped out of it,” explains Kerry Caranci, who served as Interim Executive Director.

The Community Foundation is ready to lead when its capacity and capabilities align with a need unmet by others in the community. Recently it helped facilitate a community group focused on wildlife safety. The process surfaced an ongoing issue with bear-human interaction in the rural mountain areas, and the Community Foundation responded with a public awareness project. “We took it on, but only because we had the capacity to do it,” says Freeman.

From a cemetery to bear safety, the leadership journey has been an interesting one for Shasta Regional Community Foundation. But unique community needs merit equally distinctive community leadership approaches. “We will continue convening and bringing people together so that our community becomes the best it can be,” says Freeman.



Looking for more stories?
Visit www.irvine.org/communityfoundations for other real-life examples of foundations engaging in community leadership.

- Helping Boost Philanthropy and Nonprofit Effectiveness
- Making Connections to Achieve Tangible Results
- Responding to Rising Needs

Plus, you can view a video and download customizable tools to advance your community leadership strategy.

Moving Forward: Tools Supporting Leadership

Use these four tools to formulate your own community leadership strategy. *Primer: Leading Community in New Ways* and the *Leadership Investment Matrix* help you introduce the topic. Solicit perspectives using the *Leadership Readiness Worksheet*. Find direction and alignment by employing the *Leadership Discussion Guide*.



PRIMER: LEADING COMMUNITY IN NEW WAYS

This three-page primer introduces community leadership concepts and stories. Use it as a simple orientation prior to engaging board and staff members in deeper discussion on leadership strategy.



LEADERSHIP INVESTMENT MATRIX

Even if your foundation is young and doesn't yet have substantial resources, there are still many ways in which you can act as a community leader. Use this matrix to consider possible leadership roles and understand the relative investments of time, money and influence each may require.



LEADERSHIP READINESS WORKSHEET

Ask your board and staff to complete this worksheet to articulate your community foundation's capacity and appetite for leadership in general or relative to a specific opportunity. What you document here will be helpful to strategy and implementation conversations.



LEADERSHIP DISCUSSION GUIDE

Start a productive discussion by sharing the aggregated results and themes from the readiness worksheets completed by board and staff. This tool provides questions to guide your conversation.

Note that blank, editable versions of these tools (Microsoft Word®) are available at www.irvine.org/communityfoundations.

Additional Leadership Resources

Members of the community foundation field can draw upon a wealth of resources generated to advance their leadership. See the end of this document for a summary and access information.

Primer: Leading Community in New Ways

PAGE 1 OF 3

What Is Community Leadership?

Community foundations do much more than accept gifts and make grants. Naturally and by design, community foundations can create a positive impact by playing a number of leadership roles beyond traditional grantmaking that include:

- Providing support to the nonprofit community in a new way
- Raising visibility and shining a light on important needs
- Bringing together key players to focus on complex challenges

Common community leadership roles include:

- Even-handed convener
- Mobilizer
- Advocate
- Resource connector
- Information hub
- Fundraiser
- Capacity builder
- Philanthropic advisor

Why Community Leadership?

Because we can. Uniquely positioned within their communities, community foundations have an opportunity to lead in ways that others cannot. In exercising this leadership, community foundations offer their communities knowledge, connections and influence.

Because we can help others and help our organization. Emerging community foundations that assume leadership roles can create benefits for community and their own organizations. By leading, community foundations can increase their impact, credibility and visibility.

What Are the Risks?

While a community foundation can achieve important benefits for itself and the community it serves, the leadership role is not without its challenges. When formulating a new leadership strategy, community foundations should consider common concerns including limited time and money, uncertainty and apprehension, confused identity, increased scrutiny, political controversy and donor alienation.

What Does Leadership Take?

Community foundations that actively pursue a leadership strategy do so in a number of ways. Each leadership activity involves a decision about the unique capabilities as well as resources the community foundation has to offer, in terms of staff and board time, grant dollars and influence.

Stories of Leadership

The concepts presented in this primer are the result of the leadership experiences of seven emerging community foundations participating in the *Community Foundations Initiative II* of The James Irvine Foundation. Below are brief summaries of their individual journeys; find complete stories in the full paper, *Learning to Lead*, and online at www.irvine.org/communityfoundations.

Taking Time to Pick the Right Project

The Community Foundation of Mendocino County drew on initial experimentation with leadership to pursue collaboration in the arena of economic development, helping create a new multi-sector alliance focused on ensuring internet access for all segments of the county.

The county needs jobs, income and a tax base. As a community foundation, how do we develop that? We took the time to understand where we could play a role and ended up grappling with those questions for a year. — Susanne Norgard

Making Connections to Achieve Tangible Results

As Fresno Regional Foundation learned to convene and connect local nonprofits working on related issues to help improve efficiency, it also encountered the challenges of choosing right-sized projects that suit its mission, and sometimes saying “no.”

Different people come to us now. We don't have a ton of money. But we have the reputation as the place to go to if you have a problem to solve. — Bill Lucido

Helping Boost Philanthropy and Nonprofit Effectiveness

Gaining deep experience in an issue area gave Kern Community Foundation the credibility and confidence to lead more broadly and invest in an online community knowledge resource.

We wanted to focus in a smart way on driving local philanthropy, while helping nonprofits improve their performance, and building their sustainability. — Jeff Pickering

lead·er·ship, *n.*

Exercising influence, mobilizing others, acting to address an unmet need, provoking new understanding, inspiring confidence.

Harnessing the Power of Human Capital

Placer Community Foundation paved the way for greater impact by building the capacity of local nonprofits and playing convener and facilitator roles — activities that require little money but a great deal of staff time.

We thought about the future, when we would have more grantmaking dollars. By doing this capacity building work in the early stages of our lifecycle as a foundation, the nonprofits in our community will be stronger when we have the resources to invest in them. — Veronica Blake

Leading on a Charged Issue

Determined to be more than a philanthropic services provider, Napa Valley Community Foundation explored serious unmet needs and chose to take on a potentially controversial issue around social justice and immigrants, facilitating conversations among local nonprofits, law enforcement agencies and others.

We don't see anyone taking up the dialogue. Our county is 35 percent Latino... and we want to be closer to that community. — Kris Jaeger

Responding to Rising Needs

Facing a statewide budget crisis, San Luis Obispo County Community Foundation rose to the challenge by facilitating dialogue and mobilizing local organizations; in the process, it established a reputation for leadership and opened the door to additional opportunities.

We're now seen as permanent and well-known in the community... With the state budget meltdown, it became obvious that we were the one who was being turned to for help. We're being viewed by the nonprofit community as a much more central, key organization. — Wendy Brown

Finding the Right Niche

After a successful hands-on intervention helping a veterans group fundraise for their cemetery, Shasta Regional Community Foundation received many requests for similar support. In response, the Community Foundation set criteria for future leadership engagements and now reserves its involvement for roles other groups can't play.

Our first leadership project put us in such a different place. We developed the skills to work effectively with different groups, and with the community. — Kathy Anderson

Leadership Investment Matrix

Consider your community foundation’s potential leadership roles in the context of what you have to invest. The matrix below suggests relative expectations for the staff time, grant dollars and influence needed to assume common leadership roles. Use the last column to assess how well each role fits the culture and circumstances of your community foundation.

- = low
- ◐ = medium
- = high

LEADERSHIP ROLES	INVESTMENT EXPECTED			FIT WITH OUR COMMUNITY FOUNDATION
	TIME	GRANT \$\$	INFLUENCE	
Even-Handed Convener: Bringing key groups together to discuss issues, raise awareness or increase efficiency.	◐	○	○	
Mobilizer: Building momentum around an issue, seeding connections between key stakeholders and encouraging development of innovative solutions.	◐	◐	●	
Advocate: Educating and engaging key stakeholders and legislators around critical issues.	●	◐	●	
Resource Connector: Forging connections between key organizations that will benefit from the relationship.	◐	○	◐	
Information Hub: Collecting and disseminating data to fill information gaps around key subjects or issues.	◐	●	○	
Fundraiser: Helping generate funding for key causes or organizations.	●	◐	●	
Capacity Builder: Aiding nonprofits in increasing their efficiency and effectiveness.	●	●	○	
Philanthropic Advisor: Educating and inspiring donors or potential philanthropists about key issues worthy of investment in the community.	●	○	◐	

Note that blank, editable versions of these tools (Microsoft Word®) are available at www.irvine.org/communityfoundations.

Leadership Readiness Worksheet

Each organization will begin its community leadership journey from a different place. Whether you have received a request to take on a leadership role, have an opportunity in mind but haven't explored it yet, or are searching for the right place to engage, use this worksheet to begin to assess your level of readiness to act as a community leader. Work with some or all of the six sections in the worksheet below as appropriate for your specific starting point.

ONE. Are there any **issue areas** that offer a particularly compelling opportunity for the community foundation to exercise community leadership? If so, list one to three issues below and indicate your level of interest in each. In the space provided, make any comments on why these issues merit investing the foundation's resources or using its influence.

	NO INTEREST					INTEREST				
Issue:	1	2	3	4	5					
Comments:										
Issue:	1	2	3	4	5					
Comments:										
Issue:	1	2	3	4	5					
Comments:										

Note that blank, editable versions of these tools (Microsoft Word®) are available at www.irvine.org/communityfoundations.

Leadership Readiness Worksheet *continued...*

<p>TWO. What resources in terms of dollars, time or other means does the community foundation have to invest in leadership efforts? List below.</p>	
Funds:	<p>Emerging leader tips: Choose a “right-sized” role. While larger foundations may be able to pursue multiple areas of community leadership simultaneously, emerging foundations with fewer resources will need to carefully select the area where they will exercise community leadership.</p> <p>Emphasize quality over quantity. Take on a smaller effort and execute it well, rather than overextending.</p>
Staff time:	
Board time:	
Relationships:	
Space:	
Knowledge or expertise:	
Other:	

<p>THREE. What types of influence does the community foundation, including board and staff members, have to offer to the community in its leadership? List below.</p>	
Connections:	<p>Also consider: What other commitments does the foundation currently have that could impact your ability to execute on this opportunity?</p> <p>Can you be consistent in your effort?</p>
Skill/capacity building:	
Reputation and credibility:	
Other:	

Leadership Readiness Worksheet *continued...*

FOUR. Are strong potential **partners** available and interested?

Partners:	Issue(s) on which to partner:	Partner role/contribution:	Action needed to engage partner:

FIVE. What are the potential **risks** of participation in a community leadership role? How might we mitigate those risks? Describe below.

Strained time and money:
Shift in strategy and/or identity:
Increased scrutiny:
Political controversy:
Donor alienation:
Other:

Leadership Readiness Worksheet *continued...*

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SIX. What are the possible **benefits** of participation in a community leadership role?

Create greater impact:

Increase visibility:

Grow credibility:

Build or share knowledge:

Offer or grow capability:

Make meaningful connections:

Other:

Leadership Strategy Discussion Guide

Use the *Leadership Investment Matrix* and responses to the *Leadership Readiness Worksheet* as reference materials for a productive conversation about potential leadership strategies.

1.	On which issue(s) does our community foundation have the potential to create the greatest impact through greater leadership?
2.	Which roles could we take on to address the issue(s) identified above? Potential roles could include: <ul style="list-style-type: none"> <input type="radio"/> Even-handed convener <input type="radio"/> Mobilizer <input type="radio"/> Advocate <input type="radio"/> Resource connector <input type="radio"/> Information hub <input type="radio"/> Fundraiser <input type="radio"/> Capacity builder <input type="radio"/> Philanthropic advisor
3.	Which issue(s) will require the highest levels of investment ? Consider investments in terms of: <ul style="list-style-type: none"> <input type="radio"/> Time <input type="radio"/> Grant dollars <input type="radio"/> Influence
4.	Do we have the capacity to take on these role(s) at the appropriate levels of investment?
5.	What are the greatest potential risks , and how can we manage them? Risks may include: <ul style="list-style-type: none"> <input type="radio"/> Strained time and money <input type="radio"/> Shift in strategy and/or identity <input type="radio"/> Increased scrutiny <input type="radio"/> Political controversy <input type="radio"/> Donor alienation
6.	Do the potential benefits justify the investments and risks?
7.	Who could we partner with and how can we make a unique contribution relative to these organizations or groups?
8.	What additional knowledge or data do we need to determine our path forward?

Note that blank, editable versions of these tools (Microsoft Word®) are available at www.irvine.org/communityfoundations.

Additional Leadership Resources

Looking for more help with community leadership? CFLeads: Community Foundations Leading Change is a national learning cooperative on community leadership, acting as the hub and resource for community foundations focused on advancing their community leadership practice.

CFLeads offers a spectrum of peer learning opportunities that work off the *Framework for Community Leadership*, a detailed articulation of the key building blocks that make up good community leadership practice. Community Leadership Networks, Issue Networks and the Executive Leadership Institute have been shown to transform practice so that community foundations can make more community impact.

The CFLeads website offers numerous resources focused on aiding community foundations in their leadership journey, including:

- A toolkit to help community foundations use the *Framework for Community Leadership*
- White papers, publications, stories, case studies and webinars on community leadership
- Real-life examples of strategic plans, frameworks, criteria and metrics from real community foundations focused on community leadership



Visit www.cfleads.org to learn more.

FOR FURTHER READING

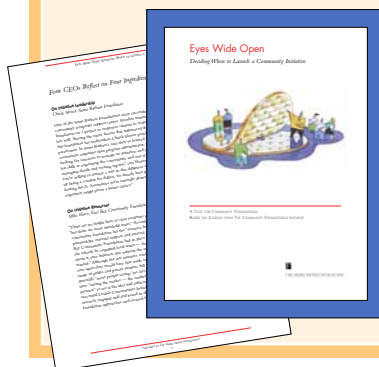
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The Balancing Act: The Role of a Community Foundation as a Community Leader, by Dorothy Reynolds, 2008.

On the Brink of New Promise: The Future of U.S. Community Foundations, by Lucy Bernholz, Katherine Fulton and Gabriel Kasper, 2005.

Community Change Makers: The Leadership Roles of Community Foundations, by Ralph Hamilton, Julia Parzen and Prue Brown, 2004.

Eyes Wide Open: Deciding When to Launch a Community Initiative, www.irvine.org/communityfoundations, 2003.



INSIGHT COMMUNITY FOUNDATIONS SERIES: LEARNING TO LEAD

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