2016 Community Foundation Boot Camp Curriculum

*Presented by Indiana Philanthropy Alliance*

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**Unit 1 – Community Foundation Basics**
- Definition, roles, history
- National Standards
- IRS Code and Tax Exempt Orgs
- Key legal documents
- Key legal concepts

**Unit 2 – Gifts and Funds**
- Definition of component fund
- Variance power
- Types of funds
- Fund agreements
- Making changes to funds
- Community project funds – fiscal sponsorship

**Unit 3 – Grantmaking and Community Leadership**
- Responsive and strategic grantmaking
- Grant processes
- Pension Protection Act
- Expenditure responsibility
- Community project funds/fiscal sponsorship
- Types of community leadership

**Unit 4 – Board & Staff Relationships**
- Governance vs. management
- CEO and Board Chair relationship and responsibilities
- Building a board team
- Board leadership
- Triple A board roles – ambassador, advocate, asker
- Board orientation
Unit 5 – Finance and Investments

- Investment policy
- Spending policy
- UMIFA (UPMIFA)
- Working with investment professionals
- Investment request-for-proposal
- Asset allocation
- Fund accounting
- Financial statements vs. audit
- Financial reports to board
- Investment/Finance/Audit committee(s)
- Operating budget
- Reporting
- Audit
- Tax compliance – Form 990

Unit 6 – Operational Sustainability

- Sustainable revenue sources
- Asset-expense mismatch
- Fund types as products
- Simple cost analysis
- Fee model of CFs
- Calculating your sustainability
- Developing a sustainability plan
- Ideas to improve sustainability

Unit 7 – Asset Building

- Asset building vs. fundraising
- Donor relationships
- Donor intent
- Managing asset development program
- Role of board members
- Types of gifts
- Planned giving
- Fund agreements

Unit 8 – Community Foundation Lifecycles

- Major influences in the development of community foundations
- Growth cycles of community foundations