

TPI's Work Supporting Community Foundations

For more than 30 years, The Philanthropic Initiative (TPI) has been committed to and actively involved in the community foundation sector. Community foundations are important community leaders, and a powerful force in deepening donors' engagement in their philanthropic giving and in growing the impact of philanthropy in their communities. TPI provides consulting services to community foundations and their donors and contributes to the growth of the field through initiatives that enhance the capacity of community foundations to work with new donors and their advisors, and to serve as important resources for the greater good. TPI has sought to identify both current and future gaps and needs for the community foundation field and bring together peer foundations to co-design creative solutions. In 2012, TPI became a distinct operating unit of the Boston Foundation, creating a partnership that has uniquely positioned TPI to understand and support the needs of the community foundation sector. TPI continues to operate locally, nationally, and globally, partnering with community foundations around the world. The following outlines TPI's consulting and field-building work with community foundations.

Consulting

Strategic Planning, Repositioning, and Restructuring

TPI designs and facilitates planning processes to help community foundations articulate a strategic vision and goals. Some of this work focuses on repositioning and restructuring community foundations to function in leadership roles for their communities – as funders, civic leaders, and philanthropic resources in the promotion of giving. These strategic engagements can last anywhere from six to 24 months, engage numerous internal and external stakeholders in the visioning and planning process, include extensive community needs assessments, and involve the development of long-range plans.

Policy, Field, and Community Assessments

TPI conducts a wide range of research and assessment activities for community foundation clients. These engagements include policy analyses, peer community foundation analyses on a range of topics, and community assessments to help inform foundation strategy.

Program Evaluation

TPI evaluates the process and impact of community foundation efforts in a variety of areas, including collaboration and partnership, civic leadership, and systems change. TPI also helps community foundations publish or otherwise share important models and initiatives with the field.

Donor Engagement Strategy and Evaluation

TPI partners with community foundations to assess, refine, develop, and/or redesign donor engagement strategies, including giving circles and funder collaboratives. Lessons learned from evaluation activities help clients maximize donor engagement and relations.

One-on-One Consulting for Donors

TPI partners with community foundations to provide fee-based consulting for funders with donor-advised funds (DAFs), including individuals, families, and companies. TPI is typically engaged to augment the support given to donors by foundation donor services staff, including family meeting facilitation, issue area research and landscape scans, strategic planning, program design and implementation, grants management, evaluation, international grantmaking, scholarship program design and management, and more.

Donor Education

TPI designs and conducts educational workshops for donors on a variety of topics, including finding a focus and establishing goals, ramping up in size and/or impact, involving the next generation, building a legacy, evaluating the impact of your philanthropy, international philanthropy, and more. Community foundations can also co-brand or private label TPI's donor support materials, including *Giving Together: A Primer for Family Philanthropy*.

Staff Training and Support

TPI develops customized training programs for community foundation staff on topics ranging from family philanthropy, international philanthropy, and ramping up. Trainings also include Excellence in Family Philanthropy workshops, based on TPI's national initiative designed to support the competencies and tools needed to support family philanthropy.

International Grantmaking Support

TPI's Center for Global Philanthropy is a resource to community foundations in supporting donors who wish to use their donor-advised funds to make international grants. Services include creating and facilitating giving circles and donor networks, facilitating workshops on international philanthropy, conducting research and landscape scans on key issues and/or geographies, curating donor trips and site visits, and conducting due diligence on prospective grantees. TPI also supports community foundations and their donors in responding to disasters.

Professional Advisor Engagement and Training

TPI leads educational programming and workshops for professional advisors working with community foundations, including content and training based on the TPI/U.S. Trust Study of The Philanthropic Conversation, to support their role in discussing philanthropy with high-net-worth individuals and families.

SAMPLE CLIENTS

Arizona Community Foundation
Battle Creek Community Foundation
The Boston Foundation
Calgary Foundation
Central Valley Community Foundation
The Cleveland Foundation
The Columbus Foundation
Community Foundation for Northeast Florida
Community Foundation of Greater Des Moines
Essex County Community Foundation

Greater Kansas City Community Foundation
Hartford Foundation for Public Giving
Hawaii Community Foundation
Maine Community Foundation
New Hampshire Charitable Foundation
Rhode Island Foundation
Santa Barbara Foundation
Triangle Community Foundation
Vermont Community Foundation
Winona Community Foundation

Field Building

TPI creates thought leadership and field-building initiatives designed to support and strengthen the community foundation field. Some of these efforts are described below.

Donor Education

In collaboration with three community foundations, TPI developed a web-based donor education tool, *Adventures in Giving*, to teach effective donor practices in an engaging and interactive mode.

Family Philanthropy

TPI and the National Center for Family Philanthropy (NCFP) co-convened the first community foundations CEO summit at the Pocantico Center on best practices and issues related to community foundation work in family philanthropy. In 2006, 19 US and Canadian community foundations, together with TPI, launched a multi-year collaborative learning and field development initiative called Excellence in Family Philanthropy.

Foundation-Donor Partnerships

Building on field literature and research with nearly two dozen community foundations, TPI conducted a study looking at the opportunities, challenges, and approaches to building synergistic foundation-donor partnerships. The resulting report, *Foundation and Donor Priorities: A Search for Synergy in Community Foundations*, has served as the stimulus for a series of peer-to-peer meetings examining how community foundations can realize the potential of closer bridges between the leadership work of foundations and the interests of their donors.

Impact Investing

TPI has served as an advocate and catalyst for community foundations exploring the development of a donor-facing impact investing platform. TPI worked with several New England community foundations to share best practices and find collaborative efficiencies. TPI was a contributing author to the Council on Foundation's *Community Foundation Field Guide to Impact Investing*.

International Giving

TPI has conducted a series of initiatives aimed at helping community foundations understand the opportunities, challenges, and alternative approaches to helping interested donors engage in international giving. This work included a national planning meeting of 14 community foundations; a research study exploring the needs of community foundations and alternative support structures; and piloting the Community Foundation Global Giving Network, a resource center for community foundations. In 2017, TPI conducted research as part of the Building Broader Communities in the Americas initiative on strengthening the relationships among community foundations in North America with those in Latin America and the Caribbean. This work resulted in the report, *Enduring Ties: The Human Connection Between Greater Boston, Latin America, and the Caribbean*.

Thought Leadership

TPI publishes peer-reviewed journal articles and blog posts specifically for the community foundation field, covering topics including systems philanthropy and donor engagement.