

Case studies of organizations supporting  
community foundations:

**Council of Michigan Foundations (CMF),  
United States**

This case study includes a look at CMF's work on developing standards for Michigan community foundations and the strategies and activities that led to this work.

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## Council of Michigan Foundations (United States)

### 1. The Whole Organization

#### Background

The Council of Michigan Foundations (CMF), founded in 1975, is one of 28 Regional Grantmaker Associations (RAGs) in the United States serving foundation members. It covers the State of Michigan, located in the northern US between several of the Great Lakes on the US-Canada border. Since its beginning, CMF has taken an active role in supporting the development of its community foundation members, although this is only part of its role.

#### Mission and Objectives

As an association of foundations and corporations that make grants for charitable purposes, CMF's mission is to increase, enhance and improve philanthropy in Michigan.

#### Financial resources

CMF's annual operating budget for the last five years has ranged from \$8.5 million to \$9.9 million US, with one exceptional year when the budget was \$15.8 million.

CMF's annual budget to support community foundations varies, depending on the number and size of grants it has for developing community foundation capacity. Resources for work with community foundations have ranged from \$3.1 million to \$6.9 million US to \$11 million in the year in which the total budget was \$15.8 million. In recent years the major source of funding (W.K. Kellogg Foundation) for community foundation work has decreased and a major challenge is to replace this funding.

Resources for CMF's work with community foundations are obtained through:

- 1) membership dues;
- 2) grants from national foundations and other organizations that provide CMF with dollars for providing technical assistance and administrative services; and
- 3) the sale of tools for learning, publications and other resources.

#### Staffing

CMF has a full-time Director of Community Foundations, support staff, a summer intern and a varying number of consultants contracted to provide technical assistance, evaluation and other services to community foundations.

#### Governance

The Board of Trustees is appointed by CMF's membership. Trustees serve for three-year terms. The Vice Chair for community foundations serves as the chair of the Community Foundations Committee and selects members of this committee. Additional ad hoc

committees are created as necessary by the Community Foundations Committee to work on particular issues and projects. Decisions relating to work with community foundations are made by the Community Foundations Committee with final approval by CMF's Board of Trustees.

### **Membership**

CMF is a membership organization for family, private, corporate and community foundations. Of approximately 500 members, 10% (56) are community foundations.

## **2. The Environment**

### **Economic and political**

In 1999 the State of Michigan had a population of almost 10 million people, making it the eighth largest state in the US. As of 1999, Michigan's poverty rate was 11.5% with 18% of people under age 18 in poverty. Median Household Income in Michigan was \$38,883 US, with a total personal income (TPI) of \$277,295,918 (ranking ninth in the US). Michigan's largest industries in 1999 were services, durable goods manufacturing, and state and local government.

Compared with many other developed nations the United States has always favored "small" government, coupled with a culture of personal responsibility and dependence on the non-profit sector for service provision to those who cannot help themselves in the market. In recent years the size and contribution of the non-profit sector have been increasingly recognized and further encouraged by both Democratic and Republican governments.

Today, foundations and corporations are being challenged to increase their support and charitable donations in the face of program changes initiated by national, state, and local governments, as well as increased needs. In the face of this challenge, it is apparent that much can and should be done to encourage the creation and growth of new foundations and corporate giving programs.

### **Legal and tax frameworks**

Although the tax and legal frameworks remain, by world standards, relatively conducive to giving, the 1969 Tax Act introduced both a number of reforms and some major barriers to foundation philanthropy. Thus, in 1977, the Council of Michigan Foundations' (CMF) Members directed the Board of Trustees to develop a public information program that would support and encourage Michigan foundation philanthropy. This program included a plan to communicate with public policymakers. A Conference Mandate (Government Relations) Committee was established to implement the program. The purpose of the Council of Michigan Foundations'

**Worldwide INitiatives for Grantmaker Support  
– Community Foundations (WINGS-CF)**

Government Relations Program has been to seek support for legislative changes that encourage the role and effectiveness of foundation and corporate philanthropy.

Since then, the Government Relations Committee has surveyed CMF Members about their legislative interests and priorities on a timely basis. CMF also launched a “Developing Good Will Program” to assist in this public information effort. The CMF Board of Trustees approved the initial Legislative Statement on March 1, 1979. As a result of these efforts, 24 goals have been accomplished including:

At the national level:

- Reduction of mandatory pay-out requirement for private foundations to 5%
- Private foundation limit on grant administrative expenses terminated
- Fair regulations on private foundation lobbying issued
- Full deductibility of gifts to private foundations of publicly-traded stock made permanent
- Community foundations permitted to administer pooled income fund.

At the Michigan state level:

- State inheritance tax repealed
- Community foundation tax credit for individuals and businesses made permanent and definition of community foundation strengthened in tax code
- Legislation passed allowing gifts and bequests received by units of local government (cities, villages, counties, public libraries and schools), to be gifted to community foundations
- Nonprofit corporation act amended to allow youth ages 16 and 17 to serve on boards of nonprofit corporations with voting rights
- Legislation passed allowing distribution of tobacco settlement funds to state-certified community foundations for healthy youth and healthy senior programs. Michigan's share of the national tobacco settlement is \$8.3 billion, as well as interest payments on the 25% of the Tobacco Settlement not going to the Governor's Merit Awards. An initial payment of \$2.1 million was distributed in 2000 to 65 certified community foundations in a formula based on population of youth under 18, and seniors over 65. Total distribution is anticipated to exceed \$50 million over the lifetime of the settlement.
- Contributions to certified Michigan community foundations allow donors to take as a credit against their State of Michigan tax an amount equal to 50% of the gift, up to certain limitations (\$100 maximum for an individual return; \$200 for joint returns). Donors paying single business tax may take as a credit the lesser of 50% of the gift, up to \$5,000 or 5% of their single business tax liability. This credit is in addition to those available for donations to public broadcasting stations, Michigan colleges or universities and public libraries. The tax credit is also in addition to the deduction for Federal income tax purposes.

**Worldwide INitatives for Grantmaker Support  
– Community Foundations (WINGS-CF)**

Other changes have yet to be achieved. National goals include:

- Maintain the private foundation payout rate at not more than 5% to protect the real value of foundations' grantmaking capability
- Change the limitation on gifts to a private foundation from 20% to 50%.
- Increase the deduction allowed a taxpayer for a gift to a private foundation of certain capital gain property.
- Support reasonable limits on the degree to which foundations and charities can lobby or otherwise influence public policy decisions and oppose unreasonable limits that adversely affect grantmaking.
- Avoid excessive corporate giving regulations.
- Monitor estate tax legislation that would impact the creation of new foundations and gifts to existing foundations.

State-level goals include:

- Monitor changes to tax policy affecting non-profit organizations.
- Support legislation encouraging a tax-deduction for charitable contributions from individuals.
- Regularly communicate with elected officials at federal, state, and local levels about foundation activities and concerns.
- Encourage Member foundations to report grants and activities to government officials.
- Encourage Members in each Michigan Congressional District to meet as a group with their legislator to discuss the local contributions of community and private foundations, and corporate giving.
- Encourage meetings with local editorial boards and the media about foundation activities and concerns.
- Develop a state legislative network by House and Senate districts and enhance communication with key committee leadership.
- Continue discussions with the Michigan Attorney General's Office regarding community and private foundation concerns.
- Encourage meetings with the Executive Branch of state government.
- Sponsor periodic seminars for state legislators, department heads, and their staffs.
- Hold an annual "Washington Day" for members to meet with each member of the Michigan Congressional delegation.
- In addition: Support public reporting by foundations, beyond the reports required by law, and provide technical assistance for those foundations seeking to print an annual report or guidelines. Assist in distribution efforts.

### **Attitudes to "philanthropy" and "foundations"**

Foundation and corporate giving has long been a significant part of American society. In 1999, foundations and corporations donated more than \$22.8 billion for charitable causes and services, including the arts, United Way, colleges and universities, libraries,

## Worldwide Initiatives for Grantmaker Support – Community Foundations (WINGS-CF)

and programs for the elderly, and the needy. There are 42,500 foundations in the United States, with more than 1,468 in Michigan alone. In all, foundations in Michigan hold \$22.1 billion in assets and make annual grants of over \$1 billion. Assets and giving are very unevenly distributed between foundations. Some 23% of foundations own 97% of total assets, and account for a similar percentage of total giving.

A nearly one-fifth rise in 2000 giving followed five straight years of double-digit increases in the value of foundation assets. Between 1995 and 1999, foundation assets doubled from \$226.7 billion to \$448.6 billion. In 1999 alone, assets rose by \$63.6 billion or 16.5%. Dramatic gains in the value of holdings of several major independent foundations, new gifts into foundations (including a record \$32.1 billion in 1999), and accelerated growth in foundation creation have all contributed to an unprecedented increase in foundation assets.

Estimates for 2000 Foundation Giving show that giving increased by more than 18%, following a 20% increase in 1999. In a year that saw unbounded confidence in the nation's economy turn to increasing uncertainty, US grantmaking foundations raised their contributions to nonprofit organizations to a record \$4.3 billion, according to a report from the Foundation Center ([www.fdncenter.org](http://www.fdncenter.org)). Foundations gave an estimated \$27.6 billion in 2000, up 18.4% (14.6% after inflation) over the \$23.3 billion in giving reported for 1999. Community foundations experienced the fastest growth in giving in the latest year, followed closely by independent foundations. However, growth in corporate foundation giving slowed, reflecting declining corporate profits and stock values.

### **Tradition of voluntary organizations**

The United States as a whole has a long and vigorous tradition of voluntary organization, partly as a result of its distrust of government intervention. It is estimated that there are 19,000 active charitable voluntary organizations in Michigan.

More than 80% of Michigan's residents contributed to charity in 1999. The median annual donation ranged from \$50 to Environment and Youth Development organizations, to \$100 for Health, Education, Arts and Culture, Private/Community Foundations and International, to \$500 for Religious organizations.

Statewide, 46.7% of Michigan adults have volunteered during the past 12 months, with the amount of time provided per month ranging from a high of 11.9 hours per month for community foundations to a low 5.4 hours for political groups. Volunteering varies in relation to gender, age, education, income and employment.

### 3. Developing Community Foundations

#### Background

The 1999 survey of US community foundations conducted by The Columbus Foundation reported continued explosive growth in gifts, grants, and assets to US community foundations. Of the 579 community foundations identified in 1999, 27 did not exist just one year before. Gifts received exceeded \$3.6 billion, a 28% growth; grants paid exceeded \$1.9 billion, up 26%; and assets reached \$29.9 billion, an almost 19% increase. Gifts, grants, and assets each reached new record highs. Some of the factors contributing to this growth in gifts included: increased marketing and development efforts by community foundations, augmented market value of appreciated assets, and beginning of the transfer of intergenerational wealth.

Community foundations in Michigan have experienced tremendous growth both in numbers and capacity over the past 14 years. Whereas in 1988, 34 community foundations and one geographic component fund existed with combined assets of just over \$233 million, in 1999 there were 61 community foundations and 39 geographic component funds with combined assets of nearly \$1.5 billion dollars, an increase of 635%. Every county in Michigan is served by a community foundation. The majority of these foundations are vibrant, growing foundations taking an active role in their communities.

#### From Building Capacity to Creating Standards and Beyond

CMF's work on developing standards for community foundations is the result of a sequence of strategies which started with developing new community foundations, building new community foundation capacity and marketing the concept of community foundations.

#### Developing new community foundations

The story began in the late 1980s when key Michigan community foundations approached CMF asking for help to develop their capacities. Dialogue among existing community foundations, CMF and the W.K. Kellogg Foundation staff resulted in two Kellogg challenge grants with additional funding for technical assistance provided by the C.S. Mott Foundation.

It was agreed that CMF would initiate The Michigan Community Foundations' Youth Project (MCFYP) designed to:

- Assist community foundations in building unrestricted and field of interest endowments;
- Expand and extend community foundation service to cover the state so that every donor has access to a community foundation vehicle;

**Worldwide INitiatives for Grantmaker Support  
– Community Foundations (WINGS-CF)**

- Provide a permanent youth field of interest fund for communities across Michigan from which grants can be made to meet local youth needs;
- Involve youth in the process of philanthropy: assessing local needs, raising funds, and advising on grantmaking;
- Stimulate the implementation of youth volunteerism across the state of Michigan.
- Build capacity to ensure strong, sustainable community foundations.

MCFYP had several components including large challenge grants, technical assistance and mini-grants, and an emphasis on involving young people in philanthropy.

Community foundations were required to establish a Youth Advisory Committee composed of at least 50% youth. These committees assessed the needs and assets of youth in their communities, engaged in grantmaking and fund development, and stimulated youth volunteerism in their communities.

Technical assistance and networking opportunities included: on-site consultations, trainings and conferences, information services, legal assistance, publications, and mini-grants. Mini-grants were for:

- general purposes – to meet the unique needs of each community foundation;
- development – to pay for specialized development consultation, community programs, or materials directly related to fundraising and work with financial advisors; and
- trustee training - to support the costs of one trustee per year to attend a training program of their choice related to the community foundation.

Mini-grants were also available to lead foundations to offset the administrative costs of working with geographic component funds.

These strategies were very successful. Every citizen in Michigan now has local access to a community foundation. A total of 22 new community foundations and 38 geographic component funds were developed; assets held by Michigan's community foundations increased dramatically. Perhaps, most important of all, sleepy community foundations have re-engaged and many have started taking active leadership and convening roles in their communities.<sup>1</sup>

Almost all of Michigan's community foundations have a permanent Youth Advisory Committee. In 2000 these Committees had returned a combined total of \$8,138,669 in grants back to their communities. Community foundations became linked to a new

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<sup>1</sup> Growing Community Foundations: Lessons Learned From the Michigan Community Foundations' Youth Project 1991 – 1996

**Worldwide INitiatives for Grantmaker Support  
– Community Foundations (WINGS-CF)**

source of leadership, energy and ideas. Other outcomes related to engaging youth in philanthropy have been documented elsewhere.<sup>2</sup>

Promoting sustainable community foundations

Although many new community foundations were created, over half had under \$5 million in assets and many had less than \$1 million. The next step for the CMF was to develop strategies to ensure that these small community foundations became strong and sustainable.

Encouraging smaller foundations to become funds of larger foundations was one the strategies explored. Michigan community foundations value their local identities and, in general, even very small foundations were not interested in merging or becoming affiliate geographic component funds of larger community foundations. Based on strong feedback from the field, CMF worked with community foundations to identify areas where community foundations could work together to create efficiencies of scale.

Engaging technology, serving rural areas, providing technical assistance designed to strengthen capacity, encouraging joint projects and collaborative grants, establishing standards, a common brand and identity and the Venture Products Initiative (see below) are all areas in which efficiencies of scale have been realized. Specific examples of ways that community foundations have worked together include:

- 1) creating regional and state-wide marketing tools (electronic presentations using Microsoft PowerPoint, printed brochures and other materials) used either on a regional basis with all of the participating community foundations' names and logos, or used individually as a shared template that could be customized;
- 2) common state-wide and regional marketing campaigns to share the costs of developing and implementing print, radio and television advertisements;
- 3) jointly hiring administrative and fund development staff who split their time between two or more community foundations;
- 4) developing a hub where small community foundations send their financial information to be entered and analyzed so that small community foundations don't have to purchase, maintain and train staff to use FIMS, a software-based financial information management system;
- 5) shared technical assistance and legal assistance; and
- 6) continuation of project team work and collaborative grants designed to encourage community foundations to work together to build assets and create efficiencies of scale.

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<sup>2</sup> Empowering Youth Growing Community Foundations: Lessons Learned from the Michigan Community Foundations' Youth Project 1991 – 1997.

### Establishing a common brand and identity

Michigan community foundations began exploring the idea of “branding” or establishing a common identity in the late 1990s. There were two reasons for this. First, community foundations were often described as “the best kept secret in town.” Few people knew they existed and, as part of their growth strategies, community foundations wanted to increase their visibility. Second, well-known national investment firms were starting to provide their clients with on-line charitable giving options. Community foundations wanted to develop common products that would keep them on the cutting edge of the charitable giving field. Before they could do this, they had to decide the extent to which they were willing to work together as a field.

Historically, community foundations’ identities are local. Michigan community foundations had to decide where they wanted to be on a continuum from being “lone stars” to choosing a stronger affinity in message and identity. After a great deal of discussion at the local and state levels community foundations decided on sharing some elements of a common identity such as the tag line “For **good**. For **ever**.” They also agreed to have “community foundation” in their names and an agreed “identity system” for local and state-level marketing materials. But sharing elements of a common identity brings benefits and risks to individual community foundations. If community foundations were to have confidence in sharing a common identity, it was important to manage risk by establishing a common set of standards.

### Creating Minimum Standards for Michigan Community Foundations

Sub-committees made up of community foundation trustees and staff developed standards. Minimum standards were developed for the following areas:

- governance
- administration and finance
- asset development
- grantmaking
- convenor and leader roles
- communications

Community foundation staff and trustees/board members discussed drafts at the local level and provided feedback to the committees. Once the standards were developed, CMF provided technical assistance to Michigan community foundations to help them meet standards. This assistance included on-site consulting, web-based documents and the *Building Foundations Marketing Planning* series. CMF provided useful documents, and provided background about why it was important to have X, Y or Z policy, what the relevant issues were and key questions to consider ([www.cmif.org/standards.htm](http://www.cmif.org/standards.htm)).

This developmental focus on building the capacity of community foundations through compliance with minimum standards placed high emphasis on community foundation trustees; the end result being trustees who were knowledgeable of, and had buy-in to,

their community foundation's policies and guidelines. It was also interactive and respectful of the diversity in the field, allowing options to be customized to fit local situations and organizational cultures.

By June 2001, 47 community foundations were in compliance.

#### Venture Products Phase I and II

The Venture Products initiative focused on developing customizable marketing tools and on reaching out to professional advisors of the wealthy, including lawyers, estate planners, financial advisors, and insurance agents.

##### *Phase I - Marketing Tools*

While community foundations were engaged in the process of branding, establishing a common identity and beginning to develop standards, a set of tools including a customizable PowerPoint presentation, *What is a community foundation?*, and several other documents were produced and disseminated. CMF provided technical expertise to customize the tools if needed and assistance with how to use the tools. In addition, the PowerPoint presentation was disseminated to over 300 community foundations outside Michigan.

##### *Phase II - Outreach to Professional Advisors Campaign*

Community foundations may participate in the Outreach to Professional Advisors Campaign when they are in compliance with standards. The campaign had three main types of activities:

- 1) A *Building Foundations Marketing Planning* training series for community foundation staff and trustees/board members. This series included four sessions focused on: setting strategy, shaping communications, preparing products and forming relationships;
- 2) State-wide advertisements placed in key publications, and development of a common Web site ([www.forgoodforever.org](http://www.forgoodforever.org)); and
- 3) Local implementation: community foundations were expected to engage in activities designed to maximize the benefits of the state-wide efforts at local level. These activities included identifying professional advisors in their area; establishing a professional advisors council; meeting face-to-face with professional advisors; and hosting luncheons or other group meetings with professional advisors. Some community foundations ran advertisements in their own local or regional publications.

### Critical success factors

CMF's experience suggests a range of both general and more specific critical success factors in developing community foundations.

General success factors for community foundation growth include:

- Committed leadership at the local level with a passion for improving the community
- Volunteers willing to give of their time and to serve as trustee/board members and committee members
- Tax incentives
- Legal vehicles for transferring wealth
- Having or creating a tradition of giving
- A support organization to provide information, technical assistance and networking opportunities

When exploring the possibility of organizing a community foundation or establishing an affiliate relationship, it is important for the local community to ask:

1. Do we know what is involved in starting an independent community foundation (e.g., costs, legal requirements, time needed)?
2. Do we have, or can we get, the financial support needed to begin and operate an independent community foundation?
3. What are the foundations or other groups in our region we might ask for a challenge grant, support for technical assistance, initial operating monies, or mini-grants for special projects?
4. How will we define our "community" boundaries?
5. What is our community's philanthropic tradition?
6. How strong is the sense of community in our area? Do individuals feel rooted to the extent that they will want to give something back to the community even if they currently do not live here?
7. Do we have a sufficiently large population and enough wealth in our area to support a vibrant, growing community foundation?
8. Do we have a credible, well-respected community leader or group of leaders who are willing to commit to the community foundation and take this on with a passion?
9. Do we know about the different legal options for affiliating, and their advantages and disadvantages?
10. What community foundations are nearby that might serve as lead community foundations?

11. What are our community's social, economic and political ties to each of the potential lead community foundations?<sup>3</sup>

More specific lessons include:

▪ **A challenge grant with a youth focus is an effective development tool**

The Michigan Community Foundations' Youth Project increased Michigan community foundations' pools of unrestricted and field of interest dollars which are historically the most difficult to raise. The youth focus has leveraged asset growth and brought new human capital to community foundations. As one executive director said "everyone can support youth." Involving youth provides community foundations with a group of current as well as future leaders, donors and board members. It expands community foundations' visibility among previously uninvolved groups of individuals. Well-informed youth, knowledgeable of their local community's needs and well versed in grantmaking, have also proven to be effective at fund development for the community foundation.

▪ **A challenge grant encourages strategic thinking**

Aside from the opportunity to acquire new resources, the challenge grant application process encouraged community foundations' boards to ask and answer the question "where do we want to go and how will we get there?" As a result, most of the state's community foundations have developed strategic plans and have re-energized their boards by developing or reaffirming their shared vision and/or by engaging new board members.

▪ **For new or small foundations a challenge grant provides essential credibility via recognition and support from a major outside foundation**

▪ **A half-time staff person (preferably full-time) is necessary for effective growth**

When community foundations are growing, most half-time staff members work more than 20 hours a week, and some work close to full time.

▪ **Challenge grants need to be coupled with capacity building efforts**

It is not enough for community foundations to have increased assets. They also need effective boards, skilled staff, organizational structures which support their grantmaking, donor service and leadership activities, sound investment practices, evaluation tools and processes to help them become learning organizations, and adequate technology with staff trained in its use.

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<sup>3</sup> Questions are reprinted from: Tice, Karin E., Community Foundations Serving Rural Areas. Grand Haven, MI: Council of Michigan Foundations

- **Providing technical assistance is a critical component of a challenge grant**

After the challenge grant ends, “enhanced technical assistance” focused specifically at building core capacities and sustainability of the most vulnerable community foundations is even more critical.

- **Technical assistance needs to be multi-faceted to meet the diversity of needs**

Technical assistance should be tailored to the levels of experience of staff and trustees/board members (e.g., beginning, intermediate and advanced) and to different sized foundations. Reaching board members is a challenge as is involving part-time volunteer staff, because of their other time commitments. A variety of methods need to be used including: on-site consulting, seminars, retreats, conferences, telephone conferencing, video trainings, etc.

- **Networking and information sharing are powerful tools for building capacity**

Annual conferences, listservs, separate retreats for executive directors and program officers, computer user groups, regular written communications, access to sample documents and a large multi-media lending library, and a web site are some of the opportunities that Michigan has offered to community foundations.

Engaging in a process to decide on a common identity, developing and implementing standards and conducting a multi-level Outreach to Professional Advisors Campaign have all provided lessons, including:

- Providing marketing tactics to the community foundation field is not enough. Strategic decisions need to be made about levels of common identity and standards. Participation and buy-in from the field around these strategic decisions take time but are necessary and ultimately make moving forward easier.
- Implementing a set of shared standards is critical to successfully managing risk when community foundations engage in shared marketing and a common identity. Community foundations have to be able to consistently deliver what is being marketed or “promised” to the public. The more that community foundations work together the greater the risk to all if one does not operate according to the agreed upon standards. Community foundation staff and trustees/board members all need to understand the connections between marketing, a common identity and managing risk through compliance with standards.
- Community foundations need to be marketing organizations, with an infrastructure for marketing, before they can make effective use of marketing tools.

- Community foundation staff may not have the technological capability or skills to use marketing tools. Technical support needs to be available.
- Linking compliance with standards to participation in the Outreach to Professional Advisors Campaign or some other “carrot” provides an incentive for community foundations to meet standards.

#### 4. Key Tensions and Challenges

CMF continues to face a number of key challenges and tensions.

##### “Leveraging our **collective** strength to benefit **each** community foundation”

CMF’s journey from developing new community foundations to establishing standards as a basis for development of marketing tools both reflects and illustrates the tensions between the collective and the local. A sense of connection and responsibility to local communities is important. The challenge is to design state-wide or regional initiatives that “leverage our **collective** strength to benefit **each** community foundation.”

##### Serving members and acting as “gatekeeper”

The challenge for CMF is how to be a servant-leader organization: balancing its role as a membership driven organization while serving as an intermediary for community foundation initiatives supported by national funders, state government or other key stakeholders.

##### Finding sustainable funding

Another challenge is how to provide sustainable funding for the high level and quality of technical assistance that community foundations have come to expect from CMF.

Michigan community foundations have been successful in building capacity, developing a common identity and marketing strategy. Developing standards has been essential in underpinning joint work, identity and marketing. But development of community foundations is an on-going process. New and established community foundations need to be constantly building, maintaining and strengthening their capacities. There is a continual need for technical assistance to manage growth.

The needs of Michigan community foundations in the next five years include:

##### *Building capacity*

- Ongoing training and professional development opportunities for staff and trustee/board members

**Worldwide INitiatives for Grantmaker Support  
– Community Foundations (WINGS-CF)**

- Processes, tools, information and technical assistance will be needed when community foundations continue to experience rapid growth
- Evaluation systems and tools to help community foundations become learning organizations
- Mechanisms for accessing lessons learned so that community foundations can better use the information
- Ongoing technical assistance and learning opportunities related to the role of convenor and catalyst, use of technology, financial stewardship, communication, and fund development, donor services and evaluation among other areas
- Opportunities to learn from, and exchange information with, community foundations in other parts of the world

*Reaching out*

- New products such as opportunities for e-philanthropy to help community foundations stay on the cutting edge of philanthropy
- Strategies to reach out to new potential donor and volunteer populations
- Dissemination materials need for sharing lessons learned with community foundations elsewhere

CMF is committed to serving community philanthropy in the future through its mission – to increase, enhance and improve philanthropy in Michigan – and through its purposes:

- lead: to facilitate and support philanthropic responses to critical needs
- educate: to support the professional growth of grantmakers
- advocate: to represent Michigan philanthropic interests and concerns with state and national government
- promote: to help Michigan citizens understand and appreciate the role of philanthropy
- increase: to grow philanthropy in Michigan, and
- network: to provide the means for regular sharing of ideas and experience among grantmakers and grantseekers.