Meeting Summary
Consultation on Community Philanthropy in Appalachia
March 13, 2012

National Council for Higher Education (NCHE) Building
One Dupont Circle, NW
Washington, DC
NCHE Conference Center, Level 1B

Executive Summary

On March 13, 2012, the Appalachian Regional Commission (ARC) hosted a day-long Consultation on Community Philanthropy in Appalachia to better understand the role of community philanthropy in shaping the economic future of communities in the Region. About 55 participants, including a dozen presenters, were involved in the event which engaged a number of ARC's partners from across Appalachia including ARC state program managers, local development districts, federal agencies, national associations and ARC staff. The primary objective of the meeting was to build the collective group's understanding of how the growth of community philanthropy can bolster the resources and expertise that Appalachian communities need to create more vibrant local economies. The secondary objective was to generate promising ideas on how to foster the growth and development of community foundations (CFs) in the Region.

The purpose of this document is to summarize and disseminate comments and suggestions gleaned from the Consultation meeting.

A summary of Consultation observations that inform current challenges and opportunities for Appalachia includes:

- Appalachia's CF infrastructure is inconsistent--with some effective institutions but also with lots of unserved or underserved areas. Appalachia has both strong opportunities and significant barriers in developing additional community philanthropic capacity.
- Geographic affiliates offer a viable and cost-effective option for Appalachia, especially in places (more rural, remote areas) where it may be difficult to support a fully independent CF.
- Over next 20 years, the U.S. has tremendous Intergenerational Transfer of Wealth (TOW) opportunity; analysis and awareness of TOW opportunities for the Appalachian Region are limited.
- A CF can be considered a fundamental tool in the community-economic development toolbox and a critical component in building sustainable communities.

Participants and presenters were tasked with suggesting promising ideas for promoting community philanthropy in Appalachia and strengthening CF utilization as an economic

development player or partner in Appalachia. The ideas can be organized into seven main areas for action:

- Collect and Disseminate Examples
- Identify and Develop Collaborative Funding and Support Opportunities
- Systemically Increase Community Foundation Capacity and Reach
- Build Relationships between Local Development Districts (LDDs) and Community Foundations
- Work with Community Foundations to Establish Common Metrics to Measure Impact
- Research and Disseminate Information about Existing and Emerging Opportunities associated with Community Philanthropy
- Designate a Community Foundation-Agency Liaison

As ARC moves to consider the promising ideas generated from the Consultation, additional involvement will be sought from ARC state partners, other federal agencies, and relevant state, regional and national organizations and their memberships.

Several Consultation-related items can be found at www.arc.gov/philanthropy. These items include: PowerPoint presentations from several presenters; spreadsheet of Working Inventory of Community Foundations in Appalachia (last updated March 9, 2012); March 13, 2012 Consultation Agenda and List of Attendees.

Overview

Across Appalachia CFs are playing an important role in facilitating economic and community development, strengthening leadership capacity, and increasing local wealth. ARC has a rich history of working with CFs, from providing financial support for start-up operations at the Foundation for Appalachian Ohio to strengthening a network of CFs in West Virginia. CFs have often been key partners in ARC's special capacity-building work in distressed counties. This consultation was a logical next step in building a better understanding of the realities and potential for community philanthropy as a development asset and actor in Appalachia, including its challenges and opportunities.

ARC Federal Co-Chair Earl F. Gohl opened the meeting by noting that community leaders across the Region often talk about the benefits of investing federal government resources in CFs. He also stated that the ARC recognizes the potential for a substantial return on investments in community assets like CFs and their contribution to building sustainable communities. He charged the group with exploring the realities of and potential for community philanthropy as a development tool for strengthening the future of Appalachian communities. He thanked the participants in advance for providing their substantial expertise in community philanthropy and rural community-economic development as well as their knowledge of the Region to help further these efforts.

Janet Topolsky, Co-Director of the Community Strategies Group at the Aspen Institute, served as the Consultation Facilitator and set the stage for the day with an overview of CFs and their roles in community-economic development. The Consultation included an overview of community philanthropy and its landscape in Appalachia, a discussion about Transfer of Wealth, reports from four active community foundations in Appalachia representing diverse approaches, a review of recent state strategies deployed by selected state community philanthropy initiatives, and a national perspective on the status of community foundations including national standards and certification compliance. The event also included a facilitated discussion among participants that generated promising ideas for moving community philanthropy forward in Appalachia.

An Overview of Community Philanthropy in Appalachia

- John Molinaro, Co-Director, Community Strategies Group, The Aspen Institute

John Molinaro talked about the current and potential development role and impact of CFs in Appalachia. He provided information about what community philanthropy is overall, why it is potentially an important tool for community and economic development in Appalachia, and offered some general impressions about community philanthropy in Appalachia. Appalachia's existing CF infrastructure was generally described as spotty combined with limited coverage and substantial geographic and capacity barriers to growing community philanthropy.

- <u>The U. S. community foundation movement is almost 100 years old.</u> The first CF in Cleveland in 1914 focused on assembling financial resources to address critical community issues with the idea quickly expanding to larger metro areas. U.S. community foundations have seen dramatic growth during the last 20 years, especially in mid-size and rural places. Today, there are about 750 U. S. community foundations.

- <u>Several compelling reasons for recent CF growth spurt</u>:
    - Expectation that $75 trillion in transfer of wealth occur over the next 50 years, with $15 trillion expected in the next 20 years;
    - With the increasing value of energy and land resources (e.g., natural gas from shale development) communities are wanting to capture some of that value and keep it for their community's permanent benefit/use; and
    - Communities that are seeing what other rural communities are doing want to have a flexible community foundation tool in their own community toolbox.

- <u>CFs can be a permanent source of flexible money to tackle tough community issues; they are "wondrously various", with each driven to respond to unique situations and missions.</u> Primary activities include
    - Receiving charitable gifts,
    - Establishing new funds,
    - Making grants to and supporting non-profit organizations,
    - Convening the community to consider ideas, issues, challenges, and opportunities and
    - Operating sophisticated programs that conduct important tasks like regional planning, economic development, and workforce development.

- Geographic affiliates offer a viable and cost-effective option especially in places where it would be otherwise difficult or impossible to support a CF (smaller, less wealthy, remote places). Geographic affiliates are a fund or set of funds that are dedicated to benefit a **specific sub-area or adjacent area** of an existing community foundation's territory, and advised by a group of local leaders from that area. Via a national survey of all 750+ community foundations, the Aspen Institute Community Strategies Group documented that the 270 responding community foundations experienced a 237% increase in the number of geographic affiliates they held (from 432 to 1,412) in just over 10 years from 1998 to 2008. Not only is this substantial growth, but three-fourths of these geographic affiliates serve rural areas.

- More communities and organizations are embracing "rural development philanthropy" which seeks rural community transformation by fostering broad-based participation, partnering with community and economic development efforts, valuing local natural and developed resources, and producing substantive results/impact.

- Current Appalachian CF landscape:
  - About 100 CFs serve various parts of Appalachia;
  - As many CFs serve non-Appalachian as well as Appalachian areas, funding levels for Appalachia cannot be estimated;
  - Larger regional centers are mostly covered with many rural and remote areas lacking a CF or willing host foundation;
  - CFs are not equally active across their service areas;
  - Most are traditional donor-focused CFs; and
  - Some are pioneers in serving rural areas and some focus on community leadership and development.

- Three primary barriers for growing community philanthropy in Appalachia:
  - Geography: rugged terrain; patterns of association follow transportation routes not political boundaries
  - Infrastructure: limited coverage by experienced host CF; limited coverage by CF mutual-support organizations
  - Capacity: few CFs have strong affiliate hosting capabilities; most CFs struggle to find funding for core staffing needed to rapidly grow, develop and capture wealth transfer.

- Promising special opportunities that focus on community philanthropy in Appalachia:
  - Kentucky ARDPI (Appalachian Rural Development Philanthropy Initiative) focusing on distressed counties,
  - Endow Kentucky,
  - Kentucky Philanthropy Initiative and
  - Kentucky Transfer of Wealth Study (September 2010).

Transfer of Wealth and Tax Credits in Appalachia

- Don Macke, Director, Rural Policy Research Institute (RUPRI) Center for Rural Entrepreneurship

Don Macke outlined the latest thinking about the Transfer of Wealth (TOW) scenarios, the opportunity it presents for building local funds and endowments, status of TOW studies that have been done for Appalachia, and how both TOW and tax credits can be used as a tool to encourage giving.

- <u>U.S. has tremendous intergenerational transfer of wealth opportunity, especially in next 20 years.</u> RURPI has recalculated the transfer of wealth estimates, incorporating the effects of the Great Recession of 2008-2009, at between $75 trillion and $91 trillion between 2010 and 2060 (somewhat lower than a 1999 Boston College study).

- <u>Appalachian Region-specific TOW research is very limited. This has led to a lack of awareness of TOW opportunity among Appalachian communities.</u> Current TOW research has been completed for a few Appalachian states including pre-Great Recession TOWs for Ohio and Pennsylvania, statewide Kentucky (2009) and partial coverage for the states of North Carolina and New York.

- <u>Communities need to identify strategies to implement TOW studies and to enable them to retain more wealth locally</u>. TOW numbers can be used in five ways:
  - Opportunity awareness,
  - Wealth in poor places (asset based development in any community),
  - Call to action (places going through depopulation),
  - Donor targeting (engaging new generations, ethnic communities, family businesses not currently tapped) and
  - Development trusts (agriculture and energy-related boom industries).

- <u>A community conversation can change from one of scarcity and budget austerity to one of hope</u> by engaging the community in the process of strategic planning for community philanthropy. The community conversation can begin with creating a positive vision for the future, setting a realistic TOW goal, connecting with past stories of donations, legacy and impact, identifying potential donors and linking with critical community priorities. A community needs to move from understanding the TOW opportunity to seizing it and acting on that opportunity.

- <u>Experience in rural areas has shown that a capture target of 5% is an achievable number; capturing just 5% of the 10-year transfer of wealth estimate can have great impact</u>. For example, in the entire state of Kentucky $72 billion is expected to transfer over the next 10 years. If you captured 5% of only the 10-year transfer, that would equal $3.6 billion for Kentucky's communities. If you only used interest earned for grants each year that would yield about $180 million annually for Kentucky communities to invest in themselves.

- <u>Tax credits offer the potential to help with wealth creation</u>, but are challenging to enact and implement. Donors are generally unaware about tax credits; a community foundation must educate and inform potential donors. State tax credit examples included Iowa, Kentucky and West Virginia.

The Practice of Appalachian Community Foundations

- Judy Sjostedt, Executive Director, Parkersburg Area Community Foundation & Affiliates (West Virginia)
- Leanne Mazer, Executive Director, Tri-County Council for Western Maryland, also representing Community Trust Foundation, Greater Cumberland Committee
- Cara Dingus Brook, President and Chief Executive Officer, Foundation for Appalachian Ohio
- Mike Clayborne, President, CREATE Foundation, Inc. (Mississippi)

Four distinctive approaches to the practice of CFs in Appalachia were selected to tell their stories and to serve as examples of ways that some communities have already established their CF footprints. The four CFs represented a diverse mix of history (age, how got started, developmental growth), business models/organizational structures, and geographic distribution across Appalachia. The origin of the four CFs offered varied approaches: state legislated/mandated organization, incubation by the Local Development District (LDD), small private donation of $5,000 in 1963, and founding by a substantial private sector (regional newspaper) donation.

All four CFs currently serve a multi-county service area with two having a multi-state service area, only one also serves counties outside Appalachia, three of the four are certified as meeting Council on Foundations (COF) national standards. Assets and grant making vary based on counties served, age of institution and unrestricted funds. Similarly, the four CFs demonstrated a variety of community development roles played by their organizations ranging from traditional charitable bank to more leadership and community development models.

These four strong CFs offered examples of how each CF has been instrumental in making community change happen.

- Judy Sjostedt (PACF) represented a CF with 5 affiliates serving 11 counties, $30 million in assets and $2 million in annual grant making. In 9 years, Jackson County (former distressed county) has raised over $1.2 million for local projects and support funds, involved 500+ citizens and 20 non-profit agencies per year.
- Cara Brook (FOA) represented 32 counties with 9 counties served by affiliates, about $10 million in assets and about $200,000 in annual grant making. Since 2008 FOA has focused on creating educational opportunities and established the "I CAN (I am a Child

of Appalachia Network). Corporations gathered around FOA's education initiative led to work with Ohio Appalachian Business Council which has served as a voice to champion the region's economic competitiveness.

- Leanne Mazer, Tri-County Council, talked about the LDD serving as a catalyst to help get the CF going for 3 counties in western Maryland and West Virginia. Since 2006, the Community Trust Fund has accumulated $4.6 million in assets and has granted $2.7 million for community programs.
- Mike Clayborne (CREATE) talked about the regional contributions provided by $57 million in assets, $9 million in annual grant making for 15 counties. Since 1995, CREATE has convened the annual "State of the Region" meeting which addresses such key community issues as leadership development, economic development and racial reconciliation. CREATE's focus on education initiatives recently included its Community College Tuition Guarantee Program and the Toyota Education Enhancement Fund.

Each CF has had success, challenges and share common ground, particularly around improving performance and increasing sustainability.

- <u>Success factors-ingredients for success</u>:
  - Solid board leadership and giving nature of leaders of rural communities;
  - Good (committed, well-versed, credible) leadership at staff level in creation stages;
  - Committed and well-trained volunteers (emphasis on core training in community philanthropy, not general leadership development);
  - Flexible, organizational capacity-building funding;
  - Value of regional community foundation to local philanthropic efforts;
  - Presence of corporate partners with multi-county footprint;
  - Governmental partners struggling to have impact in distressed/rural areas; and
  - Building strong partnerships

- <u>Challenges to sustainability</u>:
  - Adequate unrestricted income;
  - Regional factionalism;
  - Funding staff until management fees reach the point of self-sustainability;
  - Maintaining fiduciary responsibilities;
  - Affiliate model is inherently inefficient;
  - Difficult to find ideal "region-local" mix;
  - Need incentives for giving; and
  - Finding operational underwriting (need more staffing)

- <u>Impediments to producing results:</u>
  - Maintaining current staff capacity while retooling a rapidly growing regional enterprise;
  - Insufficient number of partners;
  - Lack of investments in community philanthropy infrastructure (not new methods, tools or websites);

- Lack of flexible funding to invest in building capacity to meet mission;
- Lack of clear organizational metrics tied to funding;
- Difficulty hiring new staff with CF knowledge;
- Difficulty with marketing and fundraising activities; and
- Low education attainment level of service area

Perspective and Services for Appalachia: Council on Foundations (COF)

- Heather Scott, Managing Director, Community Foundation Services
- Diane Miller, Director, Community Foundation Services
- Stephanie Powers, Managing Director, Public-Philanthropic Partnerships

COF is a non-profit professional membership association of community, private, family, and operating foundations whose assets collectively exceed $300 billion. With about 86 percent of U.S. population served by about 750 community foundations, the COF members include about 570 members from a diverse mix of CFs (urban, rural, large, small). In early 2011, about 60 percent of community foundations that belong to COF were already in compliance with national standards.

The COF serves as a strong voice, advocate and resource for CFs across the U.S by strengthening the collaborative field of CFs and promoting a philanthropic environment supportive of CF work. It also seeks to support individual CF success through community leadership and branding building efforts, as individual CFs work to deliver local value in their communities.

Voluntary national standards (http://bestpractices.cof.org/community) grew out of an effort by the CF field in 1990's to establish professional standards. National standards for U.S. Community Foundations were initially approved by the COF Leadership Team and adopted by the CF field at its 2000 annual conference; the standards are revised and updated as needed. Standards "certify" that a community foundation meets a set of criteria related to mission, structure and governance, transparency and accountability to the community; standards are a list of norms and conditions that distinguish a community foundation. The Community Foundation National Standards Board (www.cfstandards.org/standards) administers the certification process and provides assistance and support.

COF is currently working on a Public Philanthropic Partnership Initiative begun in 2008 as effort to broaden the reach of the philanthropic field through public-private partnerships (PPPs); COF facilitates work with federal agencies and develops ties with local, ongoing philanthropy by, liaising and facilitating local and federal communications. PPPs are important because they bring government and philanthropy together in new cross-sector partnerships to address the nation's most chronic and severe issues; emerging issues of interest are with workforce development and veterans. Recent Memoranda of Understanding (MOU) include COF-USDA MOU and COF-HUD MOU. A COF booklet with best practices and lessons learned includes an example from Appalachia--Mason County, West Virginia, an affiliate of the Parkersburg Area Community Foundation.

- According to the COF, some of the significant challenges that face the start-up and growth of CFs are:
    - Sustainability,
    - Competition,
    - Maintaining positive regulatory and legislative environment,
    - Measuring impact,
    - Investment and asset growth,
    - Gaining recognition in community (move beyond the “best kept secret”),
    - Staff development, capacity and leadership pipeline,
    - Executive director must wear many hats, and
    - Convening important community issues.

Other Stakeholder Perspectives on Developing Community Philanthropy

- Harry Carver, Special Projects Manager, Office of State Programs (Endow Kentucky), Kentucky Department for Local Government
- Barry Denk, Executive Director, Center for Rural Pennsylvania

Harry Carver and Barry Denk represented other stakeholders (in this case state government entities) that are critical to providing a supportive environment and incentives to encourage communities and regions to consider the community foundation/philanthropy opportunity. Both speakers underscored the importance of TOW research and its community implementation, partnerships and collaborations of local and regional community and economic development organizations, and the importance of economic developers (at all levels) understanding the role and impact of community philanthropy in order to better work together to build vibrant, sustainable communities.

- The Center’s work has supported Pennsylvania’s local governments to determine their visions for the future and completing Pennsylvania TOW research. Of special interest is shale development; communities need community-based institutions, strategies and training to take advantage of shale development opportunities—to capture newly created wealth to pass on to the community-at-large and to deal with long-term community issues. Barry underscored the merit of using a circuit rider approach to encourage donor giving and the need to encourage local economic developers and community philanthropy to find ways to work together on building community-based organizations.

- Kentucky’s recent experience in developing its community philanthropy footprint includes the Kentucky Philanthropy Initiative, the Transfer of Wealth analysis, the Endow Kentucky state tax credit legislation, and the Appalachian Rural Development Philanthropy Initiative (ARDPI), a technical assistance effort to build CF philanthropy infrastructure in ARC-designated distressed counties. Harry emphasized the importance of community foundation infrastructure in order to take advantage of state tax credits and to make communities self-sufficient.

Facilitated Discussion
A facilitated discussion was used to capture ideas from the participants and presenters to generate a list of ideas (for action) for strengthening community philanthropy in Appalachia. This summary is not meant to provide a complete list of suggestions and ideas shared during the event; however, they include major ideas generated and major themes that emerged. Attachment A provides a list of participant generated questions.

Participants and presenters were tasked with suggesting their best ideas for promoting community philanthropy in Appalachia and strengthening CF utilization as an economic and community development player or partner in Appalachia.

The responses can be organized into seven main areas.

1. **Collect and Disseminate Examples**. Define and identify examples of effective partnerships and exemplary projects demonstrating how community philanthropy and development organizations can partner to build local and regional economies, in order to:
    a. Inform and motivate prospective partners.
    b. Help them better understand the possibilities and options.
    c. Spark collaborative action.

2. **Identify and Develop Collaborative Funding and Support Opportunities.** High impact strategies could include:
    a. Examine federal and state programs to identify potential areas for collaboration with and support of community philanthropy across the Region.
    b. Collect and share information about what could be funded or supported, limits of funds and priorities for funding.
    c. Examine possibilities to fund demonstration projects that would encourage innovation, test current eligibility limits and provide for opportunity to learn from (share) each other's work.
    d. Link community foundations with existing supportive programs such as AmeriCorps VISTA and other programs of the Corporation for National and Community Service and other community development initiatives.
    e. Identify and address program and regulatory barriers that might impede the effective use of federal and state programs for supporting development of community philanthropy (prohibitions of supporting endowment, program eligibility criteria, etc.).

3. **Systemically Increase Community Foundation Capacity and Reach.** Undertake a range of activities designed to ensure that an effective development-focused community foundation serves every part of Appalachia including:

a. Encourage and support the development of truly regional structures to support rural development philanthropy and foster community foundation sustainability.
b. Support high-end, tailored technical assistance to help community foundations develop effective affiliate programs that effectively expand geographic reach and local coverage and address other critical issues and capacity needs (facilitation and visioning, back office operations, donor development, endowment building, etc.)
c. Help sustain affiliate programs through the startup period when revenues are insufficient to cover development and administrative costs.
d. Create and support a regional "trade association" for community foundations practicing community development philanthropy to share best practices, mentor each other and collectively work to improve practice.

4. **Build Relationships between Local Development Districts (LDDs) and Community Foundations.** Identify opportunities for LDDs and community foundations to learn more about their common ground, mutually supportive activities, different degrees of flexibility, and what and how they can work together for the prosperity of their regions.

5. **Work with Community Foundations to Establish Common Metrics to Measure Impact**. Contribute to the ongoing conversations about the value of performance metrics for community foundations and how they contribute to community and economic development such as impact of community foundations on economic growth, employment, sustainability and health and safety.

6. **Research and Disseminate Information about Existing and Emerging Opportunities associated with Community Philanthropy**. Collect and disseminate reliable and timely information on critical issues and opportunities to capture wealth for permanent benefit of the Region such as:
    a. Intergenerational transfer of wealth
    b. Energy Development—especially shale oil and gas
    c. Increasing agricultural, forest and other rural land values
    d. Wealth creation value chain development.

7. **Designate a Community Foundation-Agency Liaison.** Identify an individual or office in federal and state agencies to be a liaison linking community foundations and the agency to:
    a. Facilitate the flow of information about each other's activities.
    b. Define and identify opportunities for collaboration.
    c. Convene federal, state, local, private and nonprofit stakeholders around collaborative ventures linking community philanthropy and development.
    d. Continue to raise public awareness of community foundations.
    e. Coordinate mutual action for benefit of the Region.

Closing Summary
In his summary comments, Earl Gohl noted there are great assets throughout Appalachia in terms of community philanthropy. Recognizing there are no cookie-cutter approaches to community foundations, each community needs to be responsive to its unique environment, resources and people. In order to avoid losing the tremendous wealth potential (TOW opportunity and natural gas shale development), local, regional and state leaders and other stakeholders need to develop and implement strategies to help keep local wealth in the Region.

Community foundations represent a mechanism for local-regional collaboration that help marshal local resources to create the greatest potential, to build Appalachian communities that can create and sustain their own futures. Use of government and private sector resources can help seed, nurture and sustain community foundations.

Community philanthropy provides a pathway for local capital to be invested in local priorities. Ensuring that rural communities have capital to invest in their future is a key strategy in moving Appalachian communities forward. Community foundations are an important component of that strategy.

As ARC moves to consider the promising ideas generated from the Consultation, additional involvement will be sought from ARC state partners, other federal agencies, and relevant national organizations and their memberships.

<u>Attachment A. Participant Generated Questions.</u> The following list represents questions generated by Consultation participants. Questions were answered during the meeting as time allowed.

- What is the impact of federal estate tax moving forward?
- Are fewer larger foundations better than many small ones?
- How does a federal agency ask a CF to partner with it and how can federal agencies be better partners with CFs?
- Are CFs doing an increasing amount of investments in traditional economic development?
- When should a federal agency go to COF, when to a local foundation?
- While footprint of "fracking" (shale development) is massive, most of the capital is from a small number of companies; is COF having any dialog with those companies on how that capital is affecting areas and establishment of trust funds? Companies may not want to talk with all local communities.
- Has COF started looking at metrics for community foundations?
- Do most community foundations made standalone investments? Or do they expect grantees to contribute?
- Do CFs work with federal funds?
- As new foundations or affiliates (under ARDPI) are emerging, what thought is the state (KY) giving towards shaping them so as to be more sustainable?
- What is the role for ARC in CF development?
- What is the average size grant that CF gives out? Can CFs replace government support?
- Do CFs make only "safe" grants, or are some politically controversial?

- What was the outcome of the Ford Foundation capacity building grant to the Appalachian Ohio Foundation? Did that grant increase your capacity as much as expected? Why or why not?
- Foundation for Appalachian Ohio (FAO)—what process is used to set organizational metrics for funding? Community involvement, board only? What happens if not met?
- How was Toyota encouraged to give $50 million to CREATE Foundation? Were they required by state in exchange for tax breaks, or goodness of their heart?
- Tuition assistance program (CREATE)—how do you publicize it and do you provide support for paperwork?
- Information about tax credit for CFs with the West Virginia Neighborhood Investment Program?
- How can Ohio's Local Development Districts (LDDs) learn from Judy's internship model (Parkersburg FC) using Ohio Third Frontier Internship dollars?

- What is the difference between donor advised fund and donor designated fund?
- Does allowing donor determination of use splinter focus of CFs?
- Can there be "competing" CFs in a region?

- Do CFs have an ongoing understanding of missed donor opportunities due to limited capacity to go out and nurture those donors?
- How do churches or communities of faith play into strategies?
- You need money to determine what you can do for community; donors may want to know what activities they are investing in, which comes first?

- Are there good models of statewide Community Foundation (CF) associations that promote cooperation, collaboration, etc.?
- All regional associations of Grant makers are different—don't assume they "get" Rural Development Philanthropy, if most of their members are not doing it. How can ARC help?
- How can ARC support regional foundation(s) in growing wealth for affiliates similar to South Dakota model?
- How might ARC and the Declaration Initiative linking up benefit the work of community foundations tackling economic distress in the region?
- Recall John Molinaro's quote on a $10 million community foundation accounting being as complex as a $100 million nonprofit. How can ARC align with the national standards to ensure best practices in the CF field? An error in one CF will hurt others in terms of CF brand, public trust, etc.
- Research idea: Could we work with local courts to see how many planned gifts are leaving Appalachia annually/going to national v. local/regional causes?
- Given increasing understanding of how important regional strategies will be for rural areas to survive in global economy, does it make much sense for any CF to have limited, non-regional geographies? Should we be enticing only regional CFs?
- How might we learn and benefit from a relationship with community foundations in developing parts of the world? Global Fund for Community Foundations
- Per Don Macke, do our own dreams work—What if we had $64 million we could invest annually without Congress's input to advance Appalachia, what would we do?

- What services does Aspen offer to CFs?
- How can we get help—a presentation like John's this morning—to educate our policy makers and partners in our part of the region?
- How does a CF get the Aspen Institute's help?