Remedies for What Keeps You Up at Night

Moderators

Jamie Phillippe, CFRE
Vice President
The Alford Group

Sharon Tiknis
Executive Vice President
The Alford Group

Brad Hurlburt, CEO
Community Foundation for Palm Beach and Martin Counties

Panelists

Phillip Lanham
Vice President
The Greater Cincinnati Foundation

Fidelma McGinn
Vice President of Philanthropic Services
Seattle Foundation
Agenda

• Introduction: 15 minutes
• Panel Discussion: 45 minutes
• Question & Answer: 15 minutes
What happens in Vegas – stays in Vegas!
What keeps you up at night?
Our top donor is: Nancy Schoenouski

Eeerrr, I mean “Anonymous”
Common Challenges

• Lack of communication and protocols between departments
• Grant-making priorities of the Foundation do not match the priorities of the donor(s)
• Culture of philanthropy is understood and embraced differently throughout the organization
• Speed of DAF grant distribution
• Board members and other volunteers can be “loose cannons”
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Donate to the Hurricane Assistance Fund

We hope everyone made it through Irma safely.

The Community Foundation is here to help find solutions to the challenges Irma brought for our partners, fundholders, and grantees.

We are the convener that can work with funders and community partners to co-invest funds for maximum response and effectiveness.

With that, we have activated the Hurricane Assistance Fund. The fund will support longer term recovery and rebuilding efforts in south Florida as we uncover the true effects of the storm in the days ahead.

This fund will be used to grant funds to nonprofit organizations in Palm Beach and Martin Counties that have specific needs caused by storm conditions concerning interruption of services or facility repair and restoration. It is intended to support both immediate and long-term relief, and is dedicated to filling gaps not met by local and federal efforts.

Nonprofit organizations will be able to apply for funds from the Hurricane Assistance Fund following the storm. They may apply on our Gifts Online platform at that time HERE.

As a part of our service to the community, the Foundation will not collect an administrative fee for the Hurricane Assistance Fund.

Donation Amount

$ 25.00
Preparation of Palm Beach County Students

Our community faces challenges with college access. Of the most recent graduating high school class from the School District of Palm Beach County, fewer than 70 percent enrolled in college the fall after graduation. For students from low-income families, fewer than 60 percent enrolled.

Those who do enroll in college face challenges with successful completion. Of the graduating class of 2010, only two-thirds of those who started college received an Associate’s or Bachelor’s degree within six years. Only 33 percent of the low-income students who enrolled in college in 2010 received a degree within six years.

Our Approach

In May of 2015, a broad group of community leaders came together to discuss this issue. A working group was formed to create a strategic plan that would serve as a blueprint for the Partnership moving forward, focused on improving college access and completion for Palm Beach County.

OUR VISION is that every Palm Beach County high school graduate completes a post-secondary credential within six years of high school graduation. It prepares them for a meaningful career with a sustainable wage.

OUR MISSION is to collectively ensure an integrated and effective system of supports from middle school through post-secondary that empowers students for career success.

• The voices of students and parents are essential in designing approaches to increase access and completion.
• The initiative must intentionally consider all types of students and be inclusive of the many diverse communities within Palm Beach County.
• The route to and through college may be different for each student, requiring individualized options and supports that meet students’ unique needs and interests.
• Collective impact provides a framework for collaboration, alignment, and synergy that will most efficiently maximize community efforts to improve college access and completion outcomes.

Our Work

In order to understand how best to improve college access and completion, the Partnership commissioned a research study of the needs of Palm Beach County students. This study included review of performance data for Palm Beach County, a scan of current programs and services, and in-depth stakeholder conversations with the following groups:

• students in high school and in college,
• advisors to high school and college students,
• parents.
Community Needs Prioritization
Focus Area Identification Report
February 8, 2018

Greenway Strategy Group
on the table

your voice matters.

Step 1:
Taking Stock of Public Space and Public Life in West Palm Beach

You need to know where you are to know where you’re going.
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Vice President of
Philanthropic
Services Seattle
Foundation
Lifetime Philanthropy

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<tr>
<th>FAMILY FOUNDATION</th>
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<tbody>
<tr>
<td>Engaging family members across generations, providing advisory board support and access to exclusive multi-gen resources</td>
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<th>COMMUNITY PHILANTHROPY FUND</th>
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<td>Using the structure of a donor advised fund, and including philanthropic advising, community insights and judicious stewardship of assets</td>
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Legacy Philanthropy

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<tr>
<th>BEQUESTS</th>
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<td>Create a lasting legacy to maximize tax benefits and support the causes and organizations you care about. Bequests are gifts made through your estate plan, which can include the transfer of various asset types.</td>
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<th>PLANNED GIVING</th>
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<td>Providing a channel to give through a charitable trust or other legal structure to accomplish your personal financial &amp; philanthropic goals</td>
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Organizational Philanthropy

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<tr>
<th>CORPORATE FOUNDATION</th>
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<tr>
<td>Offering a giving fund structured to create a more strategic and streamlined philanthropic program that aligns with your business goals</td>
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<th>AGENCY ENDOWMENTS</th>
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<td>Providing a permanently endowed or quasi-endowed fund managed on behalf of a nonprofit organization</td>
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Specialized Services

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<th>GLOBAL GIVING</th>
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<tr>
<td>Support for global causes and giving to non-US based NGOs</td>
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<th>IMPACT INVESTING</th>
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<tr>
<td>Investing capital for special projects from your philanthropic funds</td>
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<th>SCHOLARSHIP FUND</th>
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<td>Benefiting students by giving to a scholarship fund that aligns with your priorities and is designed to your specifications</td>
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<th>SUPPORTING ORGANIZATION</th>
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<tr>
<td>Creating a 501(c)(3) entity affiliated with Seattle Foundation with a separate governing board of directors</td>
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Lifetime Philanthropy

**FAMILY OR PERSONAL FOUNDATION**
Engaging family members across generations, providing advisory board support and access to exclusive multi-gen resources

**COMMUNITY PHILANTHROPY FUND**
Using the structure of a donor advised fund, and including philanthropic advising, community insights and judicious stewardship of assets
LIFETIME PHILANTHROPY

Family or Personal Foundation

For engaged philanthropists — individuals, couples and families — who want to create and activate a strategic, impactful giving plan over time.
Family Foundation

For philanthropists who want to put family at the heart of their giving and engage across generations.

LIFETIME PHILANTHROPY
LIFETIME PHILANTHROPY

Community Philanthropy Fund

For philanthropists who want an effective and efficient giving strategy.
LIFETIME PHILANTHROPY

Family Philanthropy Resource Center

Helping thoughtful philanthropists who want to make an impact in the community and across generations.
Family Philanthropy Resource Center

Philanthropic Consulting
Our advisors are skilled professionals, trained by 21/64, a New York-based consulting firm, specializing in next-generation and multigenerational engagement in the areas of philanthropy and family enterprise.

Youth Grantmaking Board
Each year, a group of 15 young adults learn about community needs and are guided by Seattle Foundation staff to invest $20,000 in nonprofits they evaluate and select.

Online Resources
Family Foundation partners have unlimited access to the National Center for Family Philanthropy (NCFP), the most comprehensive resource center with best practices, webinars, research and family stories.
Value for Price Comparison

Seattle Foundation’s Full Service Philanthropic Support Goes Beyond Fund Administration

Effective Philanthropic Advising
Expert counsel elevates philanthropy from transactional check writing to transformative social investment.

Community Programs & Civic Leadership
Deep insight & authentic connection to our communities provide proven approaches to guide philanthropic investments.

Administration
Reliable fund administration & efficient grant distribution.

Based on fund balance of $500K; verified with Vanguard, Fidelity, Schwab and NPT, as of July 2016
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<th></th>
<th>E Entry – 1st Year</th>
<th>D Stewardship</th>
<th>C Cultivate</th>
<th>B Collaborate</th>
<th>A Activate</th>
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<tr>
<td><strong>Capacity</strong>&lt;br&gt;Fund size, Current and Future Assets, Engagement</td>
<td>Onboarding/Discovery Identifying charitable interests and learning about GCF</td>
<td>Retention Largely self-sufficient, Transactional</td>
<td>Engage Responsive to invitations and communications</td>
<td>Growth (assets and partnership) Seeks info, guidance, leverage Co-investment, Impact Investment, Giving Circles, Supports SK, LL</td>
<td>Strategic Long term strategic focus in topical or geographic areas Donor-led Initiatives (Transform)</td>
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<td>1 Signature $2.5M +</td>
<td>• PA Consultation&lt;br&gt;• Welcome Meeting&lt;br&gt;• Donor Access&lt;br&gt;• Event invitations&lt;br&gt;• Communications&lt;br&gt;• Anniversary Check-In&lt;br&gt;• Tier evaluation</td>
<td>• Stewardship +</td>
<td>• Cultivate +</td>
<td>• Collaborate +</td>
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<td>2 Reserve $250K - $2.5M</td>
<td>• PA Consultation&lt;br&gt;• Welcome Meeting&lt;br&gt;• Donor Access&lt;br&gt;• Event invitations&lt;br&gt;• Communications&lt;br&gt;• Anniversary Check-In&lt;br&gt;• Tier evaluation</td>
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<td>3 Essential Under $250K</td>
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