

NCFP *Community Foundations Family Philanthropy* Playbook Outline

Rev. Jan 2020

<https://www.ncfp.org/academy/community-foundations-playbook/>

Introduction (Landing Page)

- Is this tool for me?
- What are “family philanthropy services”?
- Where do I start?
- Credits

Module 1: Planning and Preparation

Unit 1: Assessing Readiness & Goals

Readiness Self-Assessment Tool, setting goals, Top 10 Ways to Position Your CF to Serve Philanthropic Families, webinar recording

Unit 2: Philanthropic Services Business Model Canvas

Instructions and downloadable templates for the Playbook’s primary planning tool for developing or revising philanthropic services

Unit 3: Case Statement

Philanthropic Services Case Statement Worksheet and instructions, examples, and more

Unit 4: Risks and Roadblocks

Ethical issues, foundation culture, policy and practice roadblocks, risk assessment frameworks, and more

Unit 5: Advice from Peers

Case study and lessons learned

Module 2: Customers

Unit 1: Introduction and Key Questions

Unit 2: Wealthy Families

Summaries of research on the philanthropic motivations, goals, values, challenges faced, and practices of wealthier families

Unit 3: Private Family Foundations



Summary of NCFP 2015 Trends Study, stories of how foundations are working with community foundations, webinar and topical call recordings, samples of private foundation services

Unit 4: Understanding Customers

Context, Customer Persona Profile Worksheet, giving personalities, focus group tools and interview questions, case study, topical call recording

Unit 5: Advice from Peers

Tiered services guidance, topical call recording, concierge services notes

Unit 6: Diverse Donors and DEI

Topical call recordings, sample materials from peers, NCFP content collection

Module 3: Social Value Proposition

Unit 1: Introduction and Key Questions

Unit 2: Getting Started

Basics of social value proposition, Planning a Portfolio Philanthropic Services, samples of service charts and lists, Ad-lib Value Proposition Template

Unit 3: Events

Topical call recordings, event samples, speaker list

Unit 4: Philanthropic Planning

Off-the-shelf materials, co-branded issue briefs, role play exercise, sample philanthropic planning tools, webinar recording

Unit 5: Youth and Successor Generations

Topical call recording, webinar recording, model programs for children and teens, model programs for young adults

Unit 6: Strategic Granting, Leadership, and Impact Investing

Context on balancing grantmaking styles, starter materials for families, webinar recording, guides and case studies for your staff

Unit 7: Supporting Collective Giving

Topical call and webinar recording, sample tools from peers, research report

Module 4: Impact Measures

Unit 1: Getting Started

Context, Measures of Success Thought Paper and Worksheet, Family Philanthropy Services Logic Model, topical call recording, other resources

Unit 2: Foundation-Centered Measures



Sample measures grid, generic program evaluation matrix, other resources

Unit 3: Donor-Centered Measures

Context, sample ladder of donor family philanthropic growth, other resources

Unit 4: Community-Centered Measures

Context, resources on measuring community giving

Unit 5: Advice from Peers

CF goals and measures 2018 survey results, examples, topical call recording

Module 5: Relationships and Channels

Unit 1: Introduction and Key Questions

Unit 2: Customer Relationships

Context, assessing types of relationships, understanding how peers and competitors assess customer relationships, resources to assess advisor relationships

Unit 3: Customer Experiences

Community Foundation Donor Experience Study and other resources, 11 Action Steps to Design an Extraordinary Client Experience, webinar recording, topical call recording, sample donor onboarding materials

Unit 4: Delivery Channels

Context on phases of customer relationships and related touchpoints, links to resources and templates for customer journey mapping

Module 6: Core Capacity

Unit 1: Getting Started

Tips from peers on staffing, Essential Reading List, webinar recording, topical call recordings, sample job descriptions and org charts, other resources

Unit 2: Basic Know-How

Resources on: the culture of advising families, effective advising and discernment, and generational styles; case studies for internal practice

Unit 3: Family Fundamentals

Resources on family systems, family dynamics and culture, wealth and money issues, and succession planning; webinar recordings; case studies for internal discussion

Unit 4: Facilitating Families



Resources on facilitation, family conflict, decision making, and avoidance; case studies for internal practice; topical call recording

Module 7: Support Activities

Unit 1: Getting Started

Context on support needed from other functions of the foundation; planning tools

Unit 2: Organizational Alignment

Resources for improving a supportive foundation culture; topical call and webinar recording

Unit 3: Marketing

Tools for marketing your Social Value Proposition, topical call recording, samples from peers

Module 8: Partners

Unit 1: Getting Started

Context on types of partnerships and partnership ecosystems, Partnership Evaluation Matrix

Unit 2: Professional Advisors

Summary of research about advisors and philanthropic planning, webinar recording, case study for internal discussion (and/or discussion with your professional advisor council), topical call recording, samples, other resources

Unit 3: Advisory Teams

Context, guides for effective teaming, resources on purposeful planning

Unit 4: Other Expertise

Resources and examples of allied professionals and subcontractors needed to serve philanthropic families

Module 9: Financial Model

Unit 1: Getting Started: Financial Model

Basic terminology, Philanthropic Services Business Modeling backgrounder, Financial Model Excel Template, other resources

Unit 2: Budgeting

Context on the choices community foundations are making, topical call recordings, samples of fee-for-service and private foundation offerings

Unit 3: Advice from Peers

Business model webinar recordings, business plan and model samples

Community Foundations Referenced

M = module, U = Unit

Akron Community Foundation – M1:U5 topical call, M6:U1 sample, M7:U1 sample, M7:U3 topical call, M9:U3 samples

Ann Arbor Community Foundation – M3:U7 topical call

Arizona Community Foundation – M2:U5 webinar and sample

California Community Foundation – M2:U3 resources, M7:U3 sample, M9:U2 topical call

Central Indiana Community Foundation – M1:U1 webinar, M2:U2 webinar, M2:U6 sample, M3:U4 topical call, M3:U4 sample, M8:U2 case study respondent, M8:U2 sample

Central New York Community Foundation – M2:U3 topical call, M3:U1 sample, M3:U3 sample, M4:U5 topical call, M6:U1 sample, M7:U3 sample, M8:U2 samples

Chester County Community Foundation – M3:U1 sample, M7:U3 samples, M8:U2 case study respondent

Communities Foundation of Texas – M2:U2 topical call, M9:U2 topical call

Community First Foundation – M6:U1 sample

Community Foundation for Greater Atlanta – M1:U5 case study, M2:U2 webinar, M3:U1 sample, M3:U2 sample, M3:U3 sample, M3:U4 sample, M3:U5 case study, M3:U5 topical call, M5:U2 sample, M6:U1 sample, M7:U3 samples, M8:U2 topical call and samples, M9:U3 sample

Community Foundation for Monterey County – M2:U3 sample, M7:U3 sample, M9:U3 webinar

Community Foundation for the Fox Valley Region – M2:U3 topical call, M3:U3 topical call, M4:U5 topical call, M9:U3 webinar

Community Foundation of Greater Chattanooga – M6:U1 topical call

Community Foundation of Greater Memphis – M2:U5 topical call, M3:U7 sample

Community Foundation of Noble County – M6:U4 topical call

Community Foundation of South Georgia – M2:U2 article

Community Foundation of Southern Arizona – M9:U2 topical call

Community Foundation of the Holland/Zeeland Area –

Community Foundation of the National Capital Region – M2:U2 article



Community Foundation of Tampa Bay – M2:U2 sample, M2:U3 topical call, M3:U1 sample, M3:U2 sample

Community Foundation Sonoma County – M3:U7 webinar and sample

East Bay Community Foundation – M3:U1 sample, M7:U3 sample, M8:U2 sample

Foundation for the Carolinas – M2:U2 topical call, M2:U5 sample, M2:U6 topical call, M3:U1 sample, – M2:U3 sample, M3:U5 webinar, M7:U3 sample, M9:U2 topical call

Foundation for the MetroWest - M3:U4 sample, M3:U5 topical call, M6:U1 sample

Greater Cedar Rapids Community Foundation

Greater Cincinnati Foundation – M2:U3 samples, M9:U3 webinar

Greater Houston Community Foundation – M3:U1 sample, M3:U3 sample, M3:U4 sample, M3:U4 webinar, M3:U5 case study, M6:U1 webinar and samples, M7:U3 samples, M8:U2 samples, M9:U3 samples

Greater Kansas City Community Foundation – M2:U5 topical call, M3:U2 sample, M3:U3 sample, M3:U4 topical call, M5:U2 webinar and sample

Greater New Orleans Foundation – M2:U3 sample

Greater Worcester Community Foundation – M3:U4 sample

Hawaii Community Foundation – M1:U5 topical call, M2:U2 sample, M2:U3 topical call, M3:U1 sample, M7:U3 sample

Marin Community Foundation – M3:U6 topical call and sample, M8:U2 sample

Orange County Community Foundation – M2:U3 webinar, M2:U3 samples

Petoskey-Harbor Springs Area Community Foundation – M3:U4 topical call

Pikes Peak Community Foundation – M3:U2 sample

Rose Community Foundation – M2:U4 quote, M3:U2 samples, M3:U4 sample, M3:U5 topical call, M6:U1 webinar and samples

San Antonio Area Foundation – M2:U6 topical call and resource

Silicon Valley Community Foundation – M3:U3 sample

Southwest Florida Community Foundation

Springfield Foundation – M2:U6 topical call

The Boston Foundation – M3:U3 topical call, M3:U4 sample, M3:U5 case study

The Calgary Foundation – M2:U3 topical call, M2:U5 webinar and sample, M3:U3 sample, M4:U5 topical call, M5:U2 sample, M6:U1 sample, M8:U2 samples



The Chicago Community Trust - M2:U3 webinar, M2:U3 sample, M6:U1 topical call

The Community Foundation for Northeast Florida (Jacksonville) – M3:U1 sample, M3:U7 topical call and sample, M4:U5 sample, M6:U1 topical call and samples, M7:U3 sample M9:U3 webinar

The Dallas Foundation – M3:U3 sample, M8:U2 webinar

The Minneapolis Foundation – M3:U4 webinar, M3:U4 sample, M5:U2 sample, M8:U2 case study respondent

The New York Community Trust – M9:U2 topical call

The Oregon Community Foundation – M1:U5 topical call, M2:U3 sample and quote, M2:U6 sample, M3:U2 sample, M3:U3 topical call and sample, M3:U4 sample, M3:U6 sample, M5:U2 webinar and sample, M6:U1 quote and sample, M8:U2 sample, M9:U3 webinar and samples

The Philadelphia Foundation – M3:U2 sample, M3:U4 sample

The Pittsburgh Foundation – M3:U1 sample, M3:U3 sample, M3:U3 webinar, M7:U3 sample

The Saint Paul Foundation and Minnesota Community Foundation – M2:U3 topical call, M4:U5 topical call, M6:U1 samples, M7:U3 sample

The San Francisco Foundation – M6:U3 speaker recording

The Seattle Foundation – M2:U3 sample, M3:U1 sample, M3:U3 sample, M3:U3 webinar, M3:U4 sample, M4:U5 sample, M5:U2 sample, M6:U1 sample, M7:U1 sample, M7:U3 samples, M9:U3 webinar and samples

Triangle Community Foundation – M3:U7 webinar and sample, M6:U1 topical call