NCFP Community Foundations
Family Philanthropy Playbook Outline

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 recordings

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, community-centric fundraising discussion, 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 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, behavioral science insights workshop, focus group tools and interview questions, case study, topical call recording

Unit 5: Advice from Peers
  Tiered services guidance, concierge services, topical call and webinar recordings about working
  with business-owning families

Unit 6: Diverse Donors and DEI
  Topical call and workshop session 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, creative starter packages, 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, legacy planning topical call, strategic lifespan workshop recording, webinar
  recording

Unit 5: Youth and Successor Generations
  Topical call, webinar, and workshop recordings; model programs for children and teens, model
  programs for young adults and young changemakers; impact evaluation of Greater Houston
  Community Foundation's programs and related research

Unit 6: Strategic Granting, Leadership, and Impact Investing
  Context on balancing grantmaking styles, starter materials for families, webinar recordings,
  guides and case studies for your staff; connecting donors to community leadership goals;
  grantmaking policies related to hate groups

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 and client experience workbook; webinar, workshop, and topical call recordings; 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; strategy conversations webinar recording

Unit 3: Family Fundamentals
Resources on family systems, family dynamics and culture, wealth and money issues, and succession planning; webinar and topical call recordings; case studies for internal discussion

Unit 4: Facilitating Families
Resources on facilitation and family meetings, family conflict, family learning, decision making, and avoidance; case studies for internal practice; topical call recording; workshop and self-reflection tool on preparing for difficult conversations

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, workshop, and topical call recordings; case study for internal discussion (and/or discussion with your professional advisor council), 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; 2021 family philanthropy services survey results

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, M2:U6 webinar, M8:U2 topical call

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

Central Florida Foundation – M1:U5 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 – M1:U4 webinar; 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 – M2:U6 topical call, 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 calls, 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 Birmingham – M8:U2 topical call

Community Foundation of Greater Chattanooga – M3:U2 topical call, M6:U1 topical call

Community Foundation of Greater Memphis – M2:U5 topical call, M3:U5 topical call, M3:U6 topical call, M3:U7 sample, M8:U2 topical call, M9:U3 webinar

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 National Capital Region – M2:U2 article

Community Foundation of Tampa Bay – M2:U2 sample, M2:U3 topical call, M3:U1 sample, M3:U2 topical call and 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:U3 sample, M2:U5 sample, M2:U6 topical call, M3:U1 sample, M3:U5 webinar, M3:U6 topical call, 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 – M8:U2 topical call

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 and topical call, 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, M9:U3 webinar

Greater Milwaukee Foundation – M2:U6 topical call

Greater New Orleans Foundation – M2:U3 sample

Greater Washington Community Foundation – M3:U5 webinar

Greater Worcester Community Foundation – M3:U5 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 calls and sample, M8:U2 sample

New Hampshire Charitable Foundation – M6:U2 webinar

North Texas Community Foundation – M1:U5 topical call, M3:U5 webinar

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

Princeton Area Community Foundation – M3:U5 webinar and topical call

Rose Community Foundation – M2:U4 quote, M2:U6 webinar, 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 – M2:U6 webinar

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, M2:U6 webinar, M6:U1 topical call

The Columbus Foundation – M2:U5 webinar

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, M6:U2 webinar, 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 – M6:U4 topical call, 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 – M2:U6 webinars, M6:U3 speaker recording, M6:U4 topical call

The Seattle Foundation – M1:U4 webinar, M2:U3 sample, M3:U1 sample, M3:U3 webinar and sample, M3:U4 sample, M3:U5 webinar, M4:U5 sample, M5:U2 sample, M6:U1 sample, M7:U1 sample, M7:U3 samples, M9:U3 webinar and samples

Triangle Community Foundation – M3:U5 topical call, M3:U7 webinar and sample, M6:U1 topical call