

Community Development Division



(opposite) Susan Margetts teaches beginning ballerinas the basics at the Southold Dance Theater in residence at the Colfax Art Center in South Bend, Ind. The Community Foundation of St. Joseph County has embarked on an ArtsEverywhere initiative in the area.

(below) Brad Bumgardner, executive director of the Parke County Community Foundation in western Indiana, stops by the Ritz Theatre in downtown Rockville. The foundation, in partnership with other groups, helped finance the renovation of the historic structure with a grant for \$348,000, the largest in the foundation's history. Now home of the Parke Players, a community theater group, the Ritz was built in 1912.

Sustaining Local Philanthropy

Indiana's community foundations

It all started nearly 16 years ago. "It" was GIFT (Giving Indiana Funds for Tomorrow), a major Lilly Endowment initiative for Indiana community foundations.

The objective was to help develop in as many Indiana communities as possible a sustainable force for philanthropy and civic engagement that would help them shape, to a greater extent, their own destinies.

The Endowment was gratified that Indiana citizens responded so generously and enthusiastically to this initiative. In 1990 when GIFT was started, there were about a dozen viable community foundations; now each of Indiana's 92 counties has at least one community foundation serving it. The pre-GIFT assets of the community foundations that have regularly participated in GIFT were about \$30 million; they now stand at more than \$1 billion.

From the beginning, the Endowment has encouraged the community foundations to become as independent and self-sustaining as possible. Many are a good distance down the road toward achieving these goals. To help as many of them as possible move clearly to the next level of sustainability, the Endowment announced the Sustaining Resource Development (SRD) program. The community foundations were invited to imagine what they should do to generate on a regular and ongoing basis the funding they require to fulfill their missions to serve their communities.

Funding to "plan ahead"

To help them in this endeavor, the Endowment through SRD offered to award each foundation up to \$250,000 toward half the budget for a three-year strategic fundraising and development plan. The foundation had to commit to funding the remainder of the budget. The Endowment also offered as a part of the program educational sessions developed and conducted by the Indiana Grantmakers Alliance and the Indiana University Center on Philanthropy.



Before starting their development plans, foundation staff and board members could attend classes all around the state to learn about community foundation fundamentals, strategic planning for resource development and the board's role in resource development. More than 25 classes were conducted, and more than 800 foundation representatives attended. The schedule of classes had to be expanded because they were oversubscribed. Through SRD, the Endowment also offered a five-person cohort of expert consultants who became "circuit riders" to provide on-site consulting and technical assistance.

The teachers in the educational sessions and the circuit

riders emphasized that the strategic fund-raising and development plans must meet at least two key requirements: 1) they needed to demonstrate how the foundation's development efforts would proceed methodically and intentionally, and 2) they needed to demonstrate that the board members would contribute personally to the foundation and play an active role in securing other contributions. To punctuate these points, the Center on Philanthropy produced two videos highlighting the importance of board engagement in the fund-raising and development efforts and providing examples of development techniques and approaches that use the talents of board members. Many community foundations showed these videos to their board members at special meetings regarding the preparation of their SRD plans.

By the end of 2005, 82 grants covering 85 of Indiana's 92 counties had been approved, and grants totaling more than \$14 million had been awarded.



Board buy-in critical to SRD

"SRD was absolutely the best thing for us," says Brad C. Bumgardner, former minister turned executive director of the Parke County Community Foundation, based in Rockville. "It compelled us to create a real plan, to be intentional and deliberate and set out real goals and how we planned to reach them." The foundation received a \$205,595 SRD grant.

This rural county west of Indianapolis – its population is only about 16,000 – has big plans. By 2010 the foundation plans to achieve a goal of \$15 million in assets and \$750,000 in annual grantmaking. Its immediate goal is a \$3 million expansion of foundation assets by the end of 2008.

"The 17 people on the board have been very supportive," he says. "Like all the other community foundations, we realized that full participation and buy-in by the board members are absolutely critical for sustainability. We have a diverse group in age, gender and profession. And we are always looking for people who are admired for their 'servant's heart.'"

One who fits that bill is Sally L. Curley, board president till the end of 2005. A family-case manager with the county's Department of Child Services for 33 years, she admits the SRD plan is ambitious but says, "We plan to continue the momentum and enthusiasm we've generated. SRD came at just the right time for us. We have set up a Legacy Fund, which donors can join with \$500. That's doable for many people. We want people to see the foundation as the avenue to express their charitable desires."

The way the foundation has been moving, its goals seem quite achievable. When Bumgardner became executive director in the summer of 2000, the foundation's assets were approaching \$5 million. By the end of 2005, they stood at \$9.6 million.

One county, two foundations

Just northeast of Indianapolis, Madison County is one of a handful of Indiana counties to boast of two community foundations, one centered in Anderson (the Madison County Community Foundation, MCCF) and one centered in Pendleton, the South Madison Community Foundation. The two face strikingly different landscapes. The Anderson-based foundation looks out on a county facing significant job losses, population decreases, vast education needs. The other, representing four townships in the southern part of the county, looks straight down I-69 and sees the Indianapolis suburbs exploding into their area. Faced with a 41 percent increase in population in five years, they still want to maintain their small-town, friendly, "Hoosier" image and atmosphere.

Nevertheless, the two foundations have discovered that,

(above) Helen Bills, a member of the Hoosier Heritage Spinners and Weavers Club, works on a quilt for the Parke County Covered Bridge Festival. More than 2 million visitors converge on the county every October for the 10-day event. The community foundation supports organizations involved in the festival, including tours of 30 covered bridges.
(opposite) Sally DeVoe, executive director of the Madison County Community Foundation in Anderson, Ind., says that improving education is the primary focus of the organization's efforts in the economically challenged area.



however their challenges may differ, they can cooperate in operational ways – in publicizing their needs and grant opportunities, collaborating on approaches to common issues, and looking out for the good of the county as a whole. They work together in recommending how to allocate between them the Endowment’s funding opportunity for their county.

According to Sally DeVoe, its executive director, MCCF looks at uninspiring statistics: the disappearance of more than 22,000 jobs since the 1970s, a 7.1 percent unemployment rate at the beginning of 2005, a high ranking in the number of personal bankruptcies and modest incomes. She and her board have looked beyond the numbers and have decided that the one area where they can have the most positive impact on all these statistics is education.

“We need a paradigm shift around here,” says DeVoe, a former history and English teacher. “There used to be the mentality of not having to go to college, just go to work at the General Motors factory. Now there is no factory. Education is a topic that brings the whole community into play. We think people will contribute more because our main cause is focused and compelling.

“SRD came at a real juncture for us,” she says. “The Endowment asked us what we want to do, so we went to work at a series of strategic planning sessions over the summer and asked, ‘Instead of giving \$500 here and \$1,000 there, what can we do to make a real, lasting impact on our county?’ Through focus groups, information sessions, consulting and working with other organizations, we identified education as our No. 1 priority. From the outside, we want to look like a city that values education. We want to put our money where our mouth is.”

The principal components of their plan, for which the Endowment awarded them a \$126,800 SRD grant, include training for the board and staff in board development, resource development and public relations, adding one

half-time staff member and upgrading the Web site. Another vital component is continued collaboration with other groups, such as the local organizations supported by the Endowment’s community-based education initiative (CAPE) and Project 4Community (a United Way umbrella organization also funded by the Endowment) to keep the attention on education.

The plan calls for increasing the foundation’s assets to \$19 million by 2010 (they now stand at \$12.5 million), increasing the number of annual donors from 300 per year to 1,200 per year by 2010, establishing positive public relations, building strong identity and bringing new donors into the foundation for the next three years through an annual \$250,000 challenge grant for educational change.

Down by the riverside

Way south, Laura Hansen Dean oversees the work of the Community Foundation of Southern Indiana, which includes Clark, Floyd and Harrison counties nestled on the Ohio River just north of Louisville, Ky. After an extensive series of staff and board meetings, the foundation came up with a plan to significantly raise the amount of its unrestricted assets. The foundation’s total assets are \$25.8 million, but only \$4 million have unrestricted uses. The rest are dedicated to specific programs or areas of interest.

“After doing research, we determined that, in every year since 1997, grant requests exceeded our ability to meet them through earnings from the unrestricted endowment,” Dean says. “Indeed, in our highest year of grant requests, we would have needed a \$23 million unrestricted endowment to meet the requests. That brought home the importance of building up our unrestricted funds.

“We actually disbanded the development committee,” Dean says. “The whole board now constitutes that committee. Besides that, we have added an asset development officer and a part-time administrative assistant.

“Our board began realizing the value of being more proactive as a group,” Dean says. “There are people in these counties who have never been approached about the value of the community foundation, and we have a lot of territory to cover.”

The foundation received the maximum \$250,000 SRD amount for each county to implement its strategic development plan. And they have a good starting point to bring their plan to life: The foundation will celebrate its 15th anniversary in 2006, an occasion which will offer all sorts of opportunities to capitalize on the foundation’s value, show people how they can participate, and energize board members and volunteers.

 (below) A portrait of the late Rosa Parks smiles on the work supported by the African American Community Fund, a fund managed by the Community Foundation of St. Joseph County. Richmond and Virginia Calvin (left and center) were instrumental in marshaling support for the fund, which is now raising its second \$1 million. Rose Meissner (right) is president and CEO of the South Bend-based foundation.

Up by the lake

Meanwhile, at the other end of the state, the Community Foundation of St. Joseph County received a \$250,000 SRD grant to implement its overall plan. Currently it has nearly \$110 million in total assets and administers nearly 300 individual endowed funds.

Officials at the South Bend-based foundation plan to raise \$18 million in new contributions. One-third will be raised through a core strategy to advance arts and culture. Two-thirds will be raised to build existing endowed funds or establish new ones. It plans a major promotion to encourage bequests, upgrade efforts to build relationships with the professional-adviser community, enhance communications and publications and improve the Web site.

The emphasis on arts and culture – which has crystallized into a project called the ArtsEverywhere Fund – came about as a response to a defined community need. “The case for supporting the arts was supported by three factors: the fund-raising environment, the documented support of the value of the arts to economic development, and the absence in the county of a local umbrella arts agency,” says Rose Meissner, president and CEO of the foundation.

The 30 board members bought into the plan eagerly. They voted to disband the development committee and place responsibility for this crucial function on the entire board. They will act as ambassadors for the fund, contribute to it and serve on relevant committees.

“At the end of three years, we plan to have a \$5 million ArtsEverywhere Fund endowment and to have invested up to \$1.5 million in improving the arts locally,” she says.

A “first”

The same philosophy that led the foundation to initiate the ArtsEverywhere Fund also led it to help establish the African American Community Fund in 1999, the first fund of its kind in the state and one of only a handful nationally.

“We launched the fund to provide the African American community with dedicated resources, and also to bring together outstanding leaders from our African American community to determine the best use of these resources,” Meissner says.

The initial goal was \$600,000 – \$500,000 for endowment and \$100,000 of seed money to make grants. Imperative to the success of the fund was the involvement of African American families. Richmond and Virginia Calvin, both of whom have been active board members of the foundation over the years, took the lead.

“Securing major commitments from leading African American families was critical,” according to Richmond Calvin, a retired Indiana University South Bend professor of education. “We looked to a limited group of families to help us launch this fund. By coming on strong from the start, we knew we could convince others that this fund will make a significant difference for our community. Now we want to continue to broaden the base and ask citizens from throughout the African American and broader communities to help us keep it growing.”

Keep it growing they have. They upped the goal to \$1 million; they’re now raising the second million. Because of their exemplary leadership in launching this fund, the Calvins were featured in the Center on Philanthropy’s SRD video on the importance of board engagement in foundation development.

The community foundations of Indiana have their work cut out for them. But they are invariably optimistic over the long haul. As Parke County’s Bumgardner says, “Our motto is ‘Get It. Grow It. Give It Away.’ We’re dealing with forever here.”



Mapping a strategy to make geography ‘cool’

When 85 percent of surveyed Americans couldn't locate Afghanistan, Iraq or Israel on a map three years ago, Allen Carroll, chief cartographer and executive vice president of National Geographic Maps, viewed the poll's results as a professional challenge. The findings "were worse than we thought," says Carroll, "but they provided added incentive to try to raise people's awareness and knowledge of geography."

A unique collaboration to accomplish this goal emerged after Carroll met Jeffrey Patchen, president of the Children's Museum of Indianapolis. As the men discussed the problem of geography illiteracy, "We had one of those 'aha!' moments," recalls Patchen. "We started to talk about what might happen if the people at the world's largest children's museum were to establish a collaboration with the people at the world's largest producer of maps. We wondered, 'What kind of traveling exhibit could we put together?'"

Subsequent meetings at the National Geographic Society headquarters in Washington yielded a plan and attracted another contributor, the Environmental Systems Research Institute. As the country's foremost producer of global positioning systems, it agreed to provide the expertise that would expand the exhibit beyond early mapping techniques to include the latest in mapping technology.

more than place and space

The scope of the project quickly grew to encompass several interactive theme areas that will enable families to search the ocean floor for treasure, design a map of the stars, and create plans for trips across land, over water and into the air. A highly interactive Web site will complement and reinforce the exhibit experience, and lesson plans and other support materials will prepare students for field trips to the museum venues.

"One thing I've learned in working with Allen and his staff is that geography is much more than physical place and space," says Patchen. "It's also the study of weather, the migration of people, changes in the shapes and features of the land, and ways we relate to the whole ecosystem."

To further capture the human aspect of mapping, the exhibit will introduce children to pioneers such as archaeologist Zahi Hawass, shipwreck explorer Philip Masters, conservationist J. Michel Fay and aviator Amelia Earhart. Artifacts range from compasses to computers, and from a

robot that helped explore Egypt's pyramids to the floor plan of Gilligan's Island.

"Our greatest challenge is winnowing down an almost limitless number of concepts to a handful of ideas that will work best in an exhibit venue," says Carroll. "Kids love puzzles, which are very much akin to maps." After years of working on the flat plane of a computer screen or on sheets of paper, he is enjoying the creativity that his collaboration with the Children's Museum is affording him. "I'm having great fun thinking in three dimensions," he says.

Early in the development of this project, leaders of the National Geographic Society and the Children's Museum discussed their ideas with Lilly Endowment. "The Endowment encouraged us to enlarge our vision to deepen and broaden the impact of our collaboration," notes Patchen. "They then supported that encouragement with a lead grant of \$1.4 million."

The exhibit, MAPS: Tools for Adventure, will occupy 5,000 square feet. Because not all venues have the capacity to accommodate such a large display, MAPS is flexible and can be "downsized" to fit into smaller facilities. MAPS is set to open in Indianapolis in October 2006. After six months it will move to National Geographic Society's Museum at Explorers Hall in Washington and eventually will travel to 15 North American cities in five years. By the time MAPS is retired, an estimated 4 million to 5 million persons will have experienced and learned from it.

"There are two things that I would love for families to take away from this exhibit," says Carroll. "First, I hope they realize that maps and geography are really cool. Second, I hope they understand that maps and geography aren't abstractions, but that they are something that people – and that includes kids – can do. If we can get them excited about that and provide them with tools on the Internet so they can make maps and share information, then we have done our job."