

**PARTNERS IN PROGRESS:  
A SCAN OF PRIVATE FOUNDATION-  
COMMUNITY FOUNDATION RELATIONSHIPS  
AND INITIATIVES**

**FUNDERS' NETWORK FOR SMART GROWTH  
AND LIVABLE COMMUNITIES**

**COMMUNITY FOUNDATIONS LEADERSHIP PROJECT  
WORKING PAPER  
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The Funders' Network for Smart Growth and Livable Communities has published this paper to explore past foundation experiences in partnering between and among private foundations and community foundations. This paper has been prepared as part of our exploration of opportunities and strategies that might be pursued to better support community foundation leadership in advancing smarter growth and building more livable communities.

All errors and omissions are the responsibility of the Funders' Network. To discuss this paper or for more information on the Network's Community Foundations Leadership Project (CFLP), please contact the Network's executive director, Ben Starrett, by email at [bstarrett@collinscenter.org](mailto:bstarrett@collinscenter.org) or the CFLP's Senior Consultant, Phyllis Mofson, Ph.D., at [phyllismofson@cox.net](mailto:phyllismofson@cox.net).

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## **EXECUTIVE SUMMARY/ABSTRACT**

One of the fastest growing sectors of the philanthropic community, community foundations currently number over 600 in the United States alone, and are quickly growing internationally as well. An increasing number of community foundations have become well established as respected and neutral grantmakers and conveners in their communities. Several have built sizable permanent endowments in a variety of issue areas and in unrestricted funds.

Much of the growth in the community foundations sector – in numbers, aggregate endowments, capacity, and effectiveness – is due to the systematic efforts of a relatively small number of national and regional private foundations. These private funders have over time targeted, cultivated, and come to work with community foundations as strategic local partners. Many of these efforts are ongoing, but as community foundations mature and become better positioned in their communities, their relationships with private funders continue to evolve.

This scan profiles nineteen past and current private-community foundation initiatives designed to target community foundations for the purposes of capacity building or organizational development, cultivating local partners for national and regional funders, and/or more effectively impacting particular issue areas at the local level. It provides information about the initiative's duration, investment amount, strategy, and desired outcomes. The report also offers examples of existing and new organizations that have been structured to understand and meet the unique needs of community foundations, and their roles in some of the initiatives.

The scan report then provides analysis of the initiatives regarding characteristics of the funders, the community foundations, and their relationship; the degree of weight given to programmatic versus capacity building goals among both parties; and the driving interests of the private funders and the community foundations. The scan report closes with a discussion of a growing body of learning about predictors of success in private funder – community foundation relationships, and how these may lead to the designing of successful private-community foundation partnerships going forward.

## **I. Introduction.**

One of the fastest growing sectors of the philanthropic community, community foundations currently number over 600 in the United States alone, and are quickly growing internationally as well. Many are still very small and under-staffed, and even larger community foundations have interests, functions, and needs that set them apart from private funders. But a growing number of community foundations have become well established as respected and neutral grantmakers and conveners in their communities; several have built sizable permanent endowments in a variety of issue areas and in unrestricted funds.

With the exception of a small number of more established and larger community foundations,<sup>1</sup> much of the growth in the community foundations sector – in numbers, aggregate endowments, capacity, and effectiveness – is due to the systematic efforts of a relatively small number of national and regional private foundations. These private funders have over time targeted, cultivated, and come to work with community foundations as strategic local partners. Many of these efforts are ongoing, but as community foundations mature and become better positioned in their communities, their relationships with private funders continue to evolve.

This scan of private and community foundation relationships looks both back and forward. It traces the history of several successful private foundation efforts to build the community foundation field. It looks at what has been learned through these, and how this learning is impacting current and future initiatives. And it also captures a moment in time, in which the very successes of efforts now coming to a close are requiring both private and community foundations to re-examine these relationships. It is a moment of opportunity, in which all parties are open to designing new ways of working together for their mutual benefit.<sup>2</sup>

## **II. The Initiatives.**

The following profiles describe some of the major national and private funder initiatives targeting multiple community foundations over approximately the past twenty years. Most private funders provide grants to community foundations under various programs and issue areas; conversely, the vast majority of community foundations have relationships with private and family foundations – particularly with private regional and local funders. Systematic initiatives, however, are still rare – especially at the national level.

The initiatives profiled here were selected because they are more systematically designed to target community foundations for the purposes of capacity building or organizational

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<sup>1</sup> For example, the New York Community Trust, the Boston Foundation, Cleveland Foundation, Chicago Community Trust, and others.

<sup>2</sup> This study benefits from and builds on research previously conducted by the Council on Foundations and summarized in its 1995 report, *When Community Foundations and Private & Corporate Funders Collaborate*.

development, cultivating local partners for national and regional funders, and/or more effectively impacting particular issue areas at the local level. The profiles are not exhaustive, but represent a large share of such initiatives and offer a representative variety of funder approaches and objectives.

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**A. Funder/Initiative:** Annie E. Casey Foundation, Making Connections: A Neighborhood Transformation/Family Development Initiative

**Duration:** Current, Phase I – Three-year demonstration project

**Investment:** Up to \$500,000,000 (as much as half of total grantmaking). This initiative is not limited to community foundations, and includes funding for target sites plus activities to build national momentum around this agenda.

**Strategy:** This Initiative is the centerpiece of the Casey Foundation’s multi-faceted effort to improve the life chances of vulnerable children by helping to strengthen families and neighborhoods in 22 cities.<sup>3</sup>

**Outcomes/Notes:** The Foundation has adopted five markers of success for the Initiative:

- 1) Evidence that a broad cross section of people embrace the notion that children do better when their families do better and families do better in supportive neighborhoods;
- 2) Visible support from community leadership and organizations;
- 3) Investment by key constituencies like the public and private sector, faith-based institutions, and service providers;
- 4) Expanded, better connected, and more focused activities to help connect families to economic opportunities, social networks, and responsive services; and
- 5) Neighborhoods better equipped to collect and use data to set priorities and make decisions about the use of community resources.

**B. Funder/Initiative:** California Endowment, Health Partnership

**Duration:** 1999 – 2002

**Investment:** \$10,638,000

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<sup>3</sup> Atlanta, Baltimore, Boston, Camden, Denver, Des Moines, Detroit, Hartford, Indianapolis, Louisville, Miami, Milwaukee, New Orleans, Oakland, Philadelphia, Providence, San Antonio, San Diego, Savannah, Seattle, St. Louis, and Washington.

**Strategy:** This is a partnership between the California Endowment and the League of California Community Foundations. In Phase I, a planning and development grant laid the groundwork through peer learning and sharing best practices. Phase II provided funding to build community foundation capacity and to conduct community-inspired health program activities. Phase III will deepen and expand the partnership's capacity building efforts with existing League members as well as emerging community foundations in California, as well as continuing support for peer learning activities.

**Outcomes/Notes:** The League of California Community Foundations serves as an intermediary for this program. The Endowment delegated key strategic, technical, monitoring, and evaluation responsibility to the League. Learning to date focuses on the variation in community foundations and the need for inclusiveness, the uniqueness of each community and the importance of the community foundation in identifying needs and shaping programs, the value of peer learning and peer review, and the evolution of the League's own ability to serve its members as a result of its intermediary role.

**C. Funder/Initiative:** Ford Foundation, Rural Development and Community Foundations Initiative

**Duration:** 1993 through present (three phases)

**Investment:** \$4.5 million in grants to community foundations; approximately \$5.5 million to Aspen Institute Community Strategies Group for work as an intermediary, including costs for providing technical assistance and organizational development

**Strategy:** To create and use enduring institutions to combat rural poverty. This Initiative's focus is to build philanthropic assets for rural development, and to build the capacity of community foundations to become effective grantmakers and service providers for their rural territories and constituencies. In Phases I and II, eight community foundations were awarded \$500,000 each over three years for re-granting to enhance economic security for rural families, and for organizational restructuring and development to align the management structure of the c.f. to more fully serve their rural constituencies. A \$1 million match was required to build endowment funds. In Phase III the Aspen Institute is convening peer exchange workshops based on learning from the first two phases, with funding for the initiative expanding beyond Ford Foundation support.

**Outcomes/Notes:** This Initiative was created as a Learning Initiative, both for community foundations and for the Ford Foundation. Emphasis has been placed on peer-to-peer learning, access to technical assistance and other outside expertise. Although the desired outcome is issue-based; i.e. to combat rural poverty, the Ford Foundation focused on building capacity among community foundations that would allow them to define need, make decisions, and create appropriate strategies and programs in their communities. In its third phase, the Rural Development and Community Foundations Initiative has become the Rural Development Philanthropy Learning Network, a diverse

group of community foundations and philanthropic organizations learning from one another innovative strategies to improve rural development practice and outcomes.

The work of the Learning Network is guided by four questions that arose out of phases I and II: 1) How can community foundations use grantmaking and program activities to enhance the economic security of low-income rural families and communities?; 2) How can community foundations raise significant endowment funds from and for rural communities to support rural community economic development?; 3) How can a community foundation build a region's awareness that its identity and economic and social well-being depend upon both its rural and metropolitan areas?; and 4) What management, structural and governance challenges and options face statewide and regional community foundations that seek to more fully serve their rural areas?

**D. Funder/Initiative:** Ford Foundation, Northern New England Sustainable Communities Project

**Duration:** 5 years, beginning in 1993

**Investment:** Approximately \$2.5 million

**Strategy:** The Northern New England Sustainable Communities Project was funded for five years beginning in 1993, linking the Ford Foundation and community foundations in New Hampshire, Vermont, and Maine.

**Outcomes/Notes:** This regional funding collaborative was designed to facilitate a holistic approach to an apparent environment- economy tension in several rural Northern New England communities. It was a pioneering effort in both building relationships between a private funder and community foundations, and in setting precedents for community foundation involvement and leadership in environmental issues.

*The Ford Foundation provides substantial support to a variety of community foundations through a variety of other programs and initiatives.*

**E. Funder/Initiative:** William and Flora Hewlett Foundation, Neighborhood Improvement Initiative (NII)

**Duration:** Launched in 1996 – varies from NII site to site.

**Investment:** \$4 million in 2001; \$4.975 million allocated for 2002

**Strategy:** Part of the Hewlett Foundation's Family and Community Development program, this effort primarily supports organizations that serve San Francisco Bay Area communities. Administered through three local community foundations (Community Foundation Silicon Valley, San Francisco Foundation, and Peninsula Community Foundation), this initiative supports multi-year, comprehensive, cross-disciplinary efforts of community-based partnerships aimed at improving the human, economic, and physical conditions in selected low-income neighborhoods.

**Outcomes/Notes:** Since 1996, the NII has made significant achievements, including the mobilization of citizens with a sustained commitment to long-term community-building efforts and the development of leadership capacities among citizens in each of the NII sites; the formation of a new, resident-controlled governance structure and new collaborations with local public and private agencies and educational institutions; the development of comprehensive plans for neighborhood improvement in each of the sites; the implementation of specific programs designed to build the capacity of community-based organizations within each of the target communities; and the leveraging of more than \$6 million from public agencies, corporations, foundations, and individual donors to support a variety of programs and projects in the areas of education, economic development, health and human services, and technology.

**F. Funder/Initiative:** James Irvine Foundation, Community Foundation Initiative (CFI)

**Duration:** 1995-2003

**Investment:** \$10 million

**Strategy:** This is a capacity building initiative that aims to support and strengthen seven smaller and mid-sized community foundations in California.<sup>4</sup> The community foundations receive a grant of up to \$100,000 annually for one to two years for planning and up to \$250,000 a year for five years for implementation to allow them to simultaneously pursue work on a priority community concern and undertake organizational development.

**Outcomes/Notes:** The Initiative set out four anticipated outcomes for the participating community foundations.

- 1) Strengthen internal infrastructures and improve grantmaking capabilities.
- 2) Increase expertise as community catalysts, conveners, and strategic grantmakers.
- 3) Enhance abilities to manage external relations and engage their respective communities in philanthropy.
- 4) Become effective and viable partners with the James Irvine Foundation in serving their respective communities.

At the midpoint, the Irvine Foundation assessed achievement toward each outcome as follows. Outcome 1) Infrastructure and grantmaking capabilities have been enhanced, as have interaction with communities and donors. Outcome 2) Partnering with other

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<sup>4</sup> Community Foundation of Riverside County, Community Foundation of Santa Cruz County, East Bay Community Foundation, Humboldt Area Foundation, Sacramento Regional Foundation, Sonoma County Community Foundation, and Ventura County Community Foundation.

organizations and efforts in the community has generally increased among the seven participating community foundations. Expansion of the role as catalyst and convener around key community needs and issues varied from community foundation to community foundation. Outcome 3) Participating community foundations' abilities to manage external relations and engage their respective communities in philanthropy are generally enhanced. Outcome 4) The enhanced ability of community foundations to partner effectively with the Irvine Foundation has been the hardest CFI objective to both define and realize.<sup>5</sup>

**G. Funder/Initiative:** Robert Wood Johnson Foundation, Local Initiative Funding Partners Program (LIFP)

**Duration:** 1987 – present

**Investment:** Over \$63 million in partnership with more than 1,000 local grantmakers to support 197 community-based health and health care projects (not limited to community foundations).

**Strategy:** LIFP is a matching grants program designed to establish partnerships between the Robert Wood Johnson Foundation and local grantmakers in support of innovative, community-based projects that improve health and health care for underserved and at-risk populations. Under LIFP, local grantmakers (such as community foundations, family foundations, corporate grantmakers, and others) propose a partnership with RWJF to fund a new initiative. LIFP provides 36- or 48-month grants of \$100,000 to \$500,000. Grants must be matched dollar for dollar by local sources. In 2003, up to \$8 million will be awarded under the program.

**Outcomes/Notes:** Local partners are not limited to community foundations. In this Initiative, community foundations are viewed by the private funder as one of several types of local funder that both knows its community more intimately than the national foundation and can more efficiently and effectively distribute funds within it to advance the program's mission, i.e., improving health and health care for underserved and at-risk populations.

**H. Funder/Initiative:** W.K. Kellogg Foundation, Michigan Community Foundations' Youth Project (MCFYP)

**Duration:** 20 years, beginning in 1988

**Investment:** \$65 million (\$49 million to date)

**Strategy:** The MCFYP is designed to: assist community foundations in building endowments; expand community foundation coverage over the entire state; and stimulate youth volunteerism in Michigan. Under the program each Michigan Community

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<sup>5</sup> *Overarching Assessment of the Community Foundations Initiative*, Public Policy Associates, Lansing, MI, May 2001

Foundation can receive up to a \$1 million challenge grant from the Kellogg Foundation through the Council on Michigan Foundations, and also can receive technical assistance support. A companion grant of \$350,000 for each community foundation also provided technical assistance through 1995.

**Outcomes/Notes:** An affiliated Kellogg Foundation computer grant currently assists Michigan community foundations in purchasing hardware, software, and training.

The MCFYP is one of few initiatives examined that combines issue-oriented goals (increasing youth volunteerism) with capacity building and organizational development objectives specifically for community foundations. It has led to the creation of 25 new community foundations.

**I. Funder/Initiative:** John S. and James L. Knight Foundation, Community Partners Program/Donor-Advised Funds

**Duration:** ongoing

**Investment:** Over \$19 million in new grants in 2000 for Community Partners Program (not limited to community foundations). Approximately \$10 million invested directly in community foundations from 1993 to 3000. A \$50 million commitment to community foundations between 2001 and 2006.

**Strategy:** The Community Partners Program aims to improve the quality of life in the 26 communities in which the Knight brothers owned newspapers. Each partner community has a local Community Advisory Committee that determines community priorities and initiatives under the program. The foundation has included community foundation representation on each local community advisory committee. Recognizing that community foundations are often better equipped than a national foundation to address local issues and respond quickly to a high number of smaller grant requests, the foundation has also established donor-advised funds that complement the foundation's direct grantmaking in each community.

**Outcomes/Notes:** The Community Partners Program focuses on community-determined outcomes. As part of a new strategic plan approved in late 2000, the Community Partners Program will invest 60 to 65 percent of the foundation's pay-out directly in its 26 communities – approximately \$60 million in 2003. The foundation plans to invest additional resources over the coming years to strengthen community foundations, deepen its relationships with them and enhance Knight donor-advised funds. The foundation has also made, and will continue to make, grants to build the operating capacity of community foundations serving its 26 communities. These have often taken the form of challenge grants to build operating endowments, in addition to Knight's donor-advised funds.

**J. Funder/Initiative:** Kresge Foundation, Partnership to Raise Community Capital

**Duration:** December 1999 – present

**Investment:** \$18 million

**Strategy:** Each of six selected community foundations<sup>6</sup> was awarded a \$3,000,000 commitment in December 1999. In Phase I, The Kresge Foundation provided a \$1,000,000 endowment grant to each community foundation, which must be matched by \$1,000,000 in additional permanent unrestricted endowment funds. The income from the total \$2,000,000 endowment fund is unrestricted and may be used for any purpose.

In Phase II, The Kresge Foundation will provide a \$2,000,000 endowment grant to each community foundation, which must be matched 3:1 with additional agency-restricted endowments for area nonprofit organizations. When all the participating agencies reach their goals, a total of \$8,000,000 in new agency-restricted endowment funds will be held in perpetuity by the community foundation grant recipients.

**Outcomes/Notes:** The Program goals are: to build community foundation capacity; to endorse the role of a community foundation to initiate programs, provide services, and build community assets; and to promote strong partnerships between a community foundation and nonprofit organizations, donors, and financial institutions in its community. At the end of the program, each community foundation will have increased its permanent endowment assets by at least \$10 million.

**K. Funder/Initiative:** Lilly Endowment, Giving Indiana Funds for Tomorrow (GIFT) Initiative

**Duration:** 1990 through present

**Investment:** Total of approximately \$547 million through current phase (ends December 2002)

**Strategy:** GIFT was started in 1990 to create or strengthen vehicles in each of Indiana's counties to identify priorities and distribute resources to communities. In 1990 there were fewer than a dozen community foundations in the state with combined assets of \$100 million; currently every one of the state's 49 counties has a community foundation or affiliate, with combined assets of over \$1 billion.

GIFT Grants include unrestricted endowment grants, general operating support, project grants to community foundations, and project grants to non-profits recommended by community foundations. In 2000 the Lilly Endowment provided \$125,000 to each partner entity to "take stock." Findings shaped the current phase, which runs from late 2001 through 2002.

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<sup>6</sup> Wyoming Community Foundation; Community Foundation of Broward County, FL; Saginaw Community Foundation, Michigan; Community Foundation of South Alabama; Sioux Falls Area Community Foundation, SD; Community Foundation of the Eastern Shore, MD

**Outcomes/Notes:** The Initiative has the following goals: Build organizations through which Lilly Endowment funds can be distributed as they are needed throughout state; challenge those organizations to raise money and build self-sufficiency; and build on and utilize the convening abilities of community foundations.

GIFT is not limited with respect to programmatic substance or issue area. The Lilly Endowment believes these priorities are best determined by each community.

An important component of GIFT's success is the provision of technical assistance to community foundations. Housed at the state's regional affinity group, the T.A. program focuses on organizational development and capacity building.

**L. Funder/Initiative:** Charles Stewart Mott Foundation

**Duration:** Multiple initiatives over 20 year period from the early 1980s

**Investment:** Community Foundations and Neighborhoods Small Grants Program: \$55 million over 20 years

**Strategy:** The Mott Foundation's 20-year involvement with community foundations is multi-faceted, and has included working with the Council on Foundations and other private foundations to build community foundation capacity, partnering with community foundations on programmatic initiatives, and developing community foundations internationally.

One example is the Community Foundations and Neighborhoods Small Grants Program (NSGP), designed to strengthen low-income neighborhoods by distributing grants to community foundations, which re-granted the money to grassroots groups, many of which did not qualify as nonprofit groups by federal tax standards.

Other examples include working with the Council of Michigan Foundations and the Great Lakes Environmental Collaborative, partnering with the Ford Foundation to create the Intergroup Relations Program, and helping to establish the Community Foundation of Greater Flint in the Mott Foundation's hometown.

The Mott Foundation followed up the Great Lakes Environmental Collaborative project with direct support to three of the participants from Phase II. These were: the Racine Community Foundation, the Marquette Community Foundation, and the Community Foundation of Muskegon County. Each received \$100,000 over two years to continue on the projects that began during the collaborative.

**Outcomes/Notes:** The Mott Foundation feels it benefits in the following ways from supporting community foundations:

- Community foundations function as "eyes and ears" at the community level;

- Community foundations can serve to introduce the Mott Foundation to key local leaders in areas of future interest;
- Community Foundations share their expertise by identifying community level projects of interest to Mott; and
- Community foundations can provide professional management of regrating programs.

**M. Funder/Initiative:** Charles Stewart Mott Foundation and Joyce Foundation, Great Lakes Community Foundations Collaborative

**Duration:** Phase I: 1996-1998; Phase II: 1999-2001

**Investment:** Approximately \$1.1 million

**Strategy:** This Collaborative began with the observation that few community foundations were involved in environmental issues, and with the hypothesis that community foundations, armed with collaborative strategies, can be a potent contributor to solving many environmental problems due to their local nature and close connection to the health and well being of communities.

Thirty-nine community foundations participated in Phase I, with the Council on Michigan Foundations (CMF) serving as an intermediary. Eighteen of these continued into Phase II.

**Outcome/Notes:** Phase I goals were: 1. Increase environmental literacy for Great Lakes shoreline community foundations; 2. Strengthen community foundation abilities to convene their community on environmental issues; and 3. Increase local environmental grantmaking by either expanding existing permanent endowments or establishing new ones. Phase I was considered a qualified success. There was a 76% increase in environmentally-focused funds among participating community foundations; staff and trustees became more educated on environmental issues and committed to including them in their grantmaking portfolios; and the CMF's intermediary role was considered productive.<sup>7</sup>

Lessons learned from Phase I were used to establish the following Phase II goals: 1. Actively participate in innovative strategies addressing watershed, brownfield or land use issues in their regions; 2. Establish environmental collaboratives with other community foundations that share the same watershed (as a way to expand the number of community foundations addressing environmental issues); 3. Facilitate the development of agency endowed funds at community foundations for environmental nonprofits; 4. Increase community foundation's interactions with local policymakers and policy organizations on environmental issues; and 5. Assist community foundations with less than \$20 million in assets with efforts to increase the foundation's environmental endowment.

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<sup>7</sup> *Growing Community Foundations as Environmental Stewards, Phase Two*, Council of Michigan Foundations.

Phase II evaluation reinforced the initial hypothesis that community foundations have the potential to play an important role in addressing local environmental issues. Doing so can help them to build their own endowments, increase their credibility and visibility in their communities, and leverage outside resources into their communities.

**N. Funder/Initiative:** David and Lucile Packard Foundation, Community Foundations Initiative on Management Assistance

**Duration:** 1995-2002

**Investment:** \$3.6 million

**Strategy:** This initiative grew out of the Packard Foundation's interest in improving organizational effectiveness for nonprofit organizations. Community foundations were invited to apply to plan and implement management assistance programs for their own nonprofit grantees and other nonprofit organizations in their areas. Eight California Community Foundations received \$60,000 - \$90,000 per year for five years. A Needs Assessment was the only requirement; the community foundations designed their own approach to mission.

**Outcomes/Notes:** The Packard Foundation reports that it is a champion of this non-prescriptive approach to working with community foundations, leaving programmatic decision making to each community foundation, which better knows its own community. An unexpected benefit of this Initiative was that in many cases it introduced community foundations to the nonprofit organizations in their own communities.

**O. Funder/Initiative:** David and Lucile Packard Foundation, Emerging California Community Foundations Initiative

**Duration:** Four years beginning in 1999 (start date varies per community foundation)

**Investment:** \$6 million in grants, plus convenings and evaluation

**Strategy:** This initiative aims to accelerate the growth of several new philanthropies throughout California. It offers flexible operating support to nascent community foundations in areas with high need and high donor interest. Twelve rural California community foundations were identified and received two 2-year grants of \$250,000 each. The funds support hiring or bringing to full time an Executive Director, and may also be used for re-granting.

**Outcomes/Notes:** The Packard Foundation instituted a 1:1 match requirement to build permanent endowment funds halfway through Initiative in response to an evaluation. Community Foundations agreed that this was the right approach, however, recognizing that they had to build self-sufficiency and sustainability beyond Packard support. Leadership Development among community foundations has been another important outcome.

**P. Funder/Initiative:** Pew Charitable Trusts, Neighborhood Preservation Initiative (NPI)

**Duration:** 3 years (1995-1998)

**Investment:** \$8.5 million (\$6.6 million in grants with 1:2 local match requirement)

**Strategy:** Responding to the long history of intervention in blighted neighborhoods, The Initiative was built the question: “What if, rather than attempting to rebuild devastated neighborhoods, funders intervened in working class neighborhoods before they deteriorated?”

Under the Initiative nine selected target communities<sup>8</sup> each designed a local NPI plan. The original \$6.6 million in grants to sites generated a required match of \$3.9 million and leveraged an additional \$23 million in public and private investments over the life of the initiative.

**Outcomes/Notes:** NPI was designed to pursue three goals: (1) help existing neighborhood-based organizations visibly improve their communities; (2) build the capacity of neighborhood-based organizations and their volunteer leaders to sustain long-term improvements and (3) stimulate new public and private investments in working-class neighborhoods. As a result of its involvement, each NPI community built a strong sustainability plan, and at the end of the program had in place a strong group of residents working toward preserving the community’s assets. It was less clear whether the program’s focus on intact communities would be sustained without a national champion. What was learned was that neighborhood deterioration is not inevitable, and that intervention to prevent it can be a worthwhile and resource-efficient investment.<sup>9</sup>

**Q. Funder/Initiative:** Lila Wallace-Reader's Digest Fund, Community Partnerships for Cultural Participation Program (CPCP)

**Duration:** Five years beginning in 1998

**Investment:** \$9.5 million

**Strategy:** The Program seeks to enlist community foundations in strengthening local participation in arts and culture across the United States. There are ten participating community foundations.<sup>10</sup>

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<sup>8</sup> East Boston; Westside, Cleveland; Far Eastside, Indianapolis; Blue Hills, Kansas City; Vollintine-Evergreen, Memphis; Northwest Side, Milwaukee; Frankford, Philadelphia; Hamline-Midway, St. Paul; Chinatown, San Francisco

<sup>9</sup> *Communities in the Balance: Reflections on the Neighborhood Preservation Initiative; Final Report*, the Cornerstone Consulting Group, Inc., September 1998.

<sup>10</sup> Boston Foundation, The Cleveland Foundation, Community Foundation Silicon Valley, Community Foundation for Southeastern Michigan, Dade Community Foundation, East Tennessee Foundation, The

**Outcomes/Notes:** Activities planned in participating communities generally fall into three categories, with variations reflecting local opportunities and needs. These are:

- Researching and developing strategies for building arts participation;
- Establishing grantmaking and technical assistance programs to guide cultural organizations in serving diverse audiences within their communities; and/or
- Creating or enhancing permanent restricted funds - ranging from \$500,000 to \$10 million (for a projected total of \$24 million) - to support audience building beyond the grant.

The Funds also commissioned the Urban Institute to conduct a five-year study to examine efforts to build arts participation in the ten communities supported through the CPCP initiative.

**R. Funder/Initiative:**<sup>11</sup> National AIDS Fund

**Strategy:** The National AIDS Fund distributes resources from philanthropic and corporate donors by providing financial support along with technical and advocacy assistance to local communities throughout the U.S. through Community Partnerships, comprising local leaders fighting HIV/AIDS. Private philanthropic funders include: Ford Foundation, Gund Foundation, Tides Foundation, and Starr Foundation. In several communities, the partners are community foundations.<sup>12</sup> In other communities, partners are local health foundations, funding partnerships and consortiums, United Way, state and local governments, and other local funders.

**S. Funder/Initiative:** National Lesbian and Gay Community Funding Partnership

**Strategy:** The National Lesbian and Gay Community Funding Partnership is a project of funders for lesbian and gay issues. The Partnership was established in 1993 as a collaborative funding initiative between national funders and local community foundations to impact the chronic pattern of under-funding of lesbian, gay, bisexual and transgender programs and to support an effort to address these issues within the field of philanthropy.

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Greater Kansas City Community Foundation, Humboldt Area Foundation, Maine Community Foundation, New Hampshire Charitable Foundation

<sup>11</sup> This and the following initiative are multi-funder partnerships established to work with and through community foundations, rather than the initiative of a single private foundation.

<sup>12</sup> For example, Cleveland Foundation, Community Foundation of Broward County, New York Community Trust, Greater Harrisburg Community Foundation, Princeton Area Community Foundation, El Paso Community Foundation, New Mexico Community Foundation, and Community Foundation for Southern Arizona.

National Funders include: The Joyce Mertz-Gilmore Foundation, Aaron Diamond Foundation, the Colin Higgins Foundation, the Columbia Foundation, the David Geffen Foundation, the Gill Foundation, the Evelyn and Walter Haas, Jr. Fund, the Edward W. Hazen Foundation, the Levi Strauss Foundation, the Kevin J. Mossier Foundation, the Ms. Foundation for Women, Open Society Institute, and the Philip Morris Companies. Over \$3.7 million has been raised at the national level and \$2.8 million has been raised in local matching funds.

Community Foundations are invited to apply for matching grants through an annual Request for Proposals sent to foundations throughout the country each fall. Twenty-nine community foundations<sup>13</sup> have joined the Partnership since its inception.

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### **III. Community Foundation Organizations and their Roles.**

Some existing and new organizations have been structured to understand and meet the unique needs of community foundations. In some cases, these organizations have proved to be particularly effective vehicles for identifying, securing, and channeling funds from one or more private foundations to their member community foundations. The following summaries provide examples of a few models for such community foundation organizing.

***A. Council on Foundations (COF):*** The COF was started in 1940s by a group of community foundations, and then was expanded to include other types of foundations. Community foundations were quickly overtaken; the COF currently has 2000 member foundations of which approximately 440 are community foundations.

Realizing that it was not meeting the unique organizational, financial, and issue-oriented needs of its community foundation membership, the COF recently established a Community Foundation Services Department and a Community Foundations Leadership Team. The Leadership Team is led by Trustees drawn from member community foundations, and has Action Teams working on various issue areas. There is currently no Action Team working on private-community foundation initiatives and partnerships, but

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<sup>13</sup> Boston Foundation, California Community Foundation (Los Angeles, CA), Community Foundation for the Capital Region (Albany, NY), Community Foundation for Southeastern Michigan (Detroit, MI), Dade Community Foundation (Miami, FL), Greater Piscataqua Community Foundation, a regional division of New Hampshire Charitable Foundation (Portsmouth, NH), Community Foundation for Greater Atlanta, Minneapolis Foundation, Community Foundation for Middle Tennessee (Nashville, TN), New York Community Trust, Philadelphia Foundation, Community Foundation Serving Boulder County (Boulder, CO), Community Foundation for the National Capital Region (Washington, DC), Greater Santa Cruz Community Foundation (Santa Cruz, CA), Maine Community Foundation, San Francisco Foundation, Community Foundation of Cape Cod, Santa Fe Community Foundation, Community Foundation for Southern Arizona (Tucson, AZ), Greater Harrisburg Community Foundation (Harrisburg, PA), La Crosse Community Foundation (La Crosse, WI), Oak Park-River Forest Community Foundation (Oak Park, IL), San Diego Foundation, Toronto Community Foundation (Ontario, Canada), Vermont Community Foundation, Tulsa Community Foundation (Tulsa, OK), Milwaukee Foundation, Kalamazoo Community Foundation (Kalamazoo, MI), San Luis Obispo County Community Foundation (California).

the issue of how community foundations relate to the larger field of philanthropy is increasingly being raised within the Leadership Team.

***B. Community Foundations of America (CFA):*** While the COF provides program and grantmaking support services, in the late 1990s the changing financial environment caused a number of community foundations to feel that neither COF nor any other organization was providing them needed commercial and marketing services. CFA was created in 2000 to provide community foundations with financial and technological tools that are often prohibitively costly for a single community foundation to attain on its own. CFA is product driven, developing investment tools, information for cultivating and working with donors, financial software, web-based technologies, marketing and evaluation assistance, and is supported by both private foundations and community foundations. 125 community foundations are now subscribers and provide financial support to CFA.

The largest private funder contributions have come from foundations that have traditionally invested in building community foundation capacity; the Packard Foundation committed \$3 million to CFA in December 2000, while the Kellogg Foundation has provided \$500,000 and the Mott Foundation \$200,000. These private foundation grants underwrite the development and distribution of products and services that are intended to further build capacity among community foundations.

***C. League of California Community Foundations:*** Created in 1994, the League is a statewide partnership that fosters collaboration among 20 community foundations in California in order to advance community philanthropy. The League also represents the interests of community foundations at the state level, working to ensure that legislators, policymakers and regulators understand the unique and vital role of community foundations in California.

The League is continually seeking opportunities to develop new resources for community foundations and to improve awareness of community foundations with the general public, prospective donors, opinion leaders, financial professionals and other philanthropists. The goal is to expand the base of philanthropic resources that are locally controlled and locally deployed for community improvement.

An example of the League's success in expanding philanthropic resources is its role in the California Endowment's Health Partnership, profiled in Section II above. In the role of intermediary, the League has taken on strategic, technical, monitoring, and evaluation functions, and is working to expand the Partnership's capacity building efforts for both existing and potential League members.

***D. Council on Michigan Foundations (CMF):*** CMF, with 495 foundation members, is not limited to community foundations. But it has a very active community foundations program, which provides networking opportunities, technical assistance in a variety of forms, and takes on the role of intermediary to secure new philanthropic resources for Michigan's 66 community foundations. Two examples, the Great Lakes Collaborative

and the Youth Project, are profiled above. Others, such as a community foundations tobacco settlement funds distribution program, serve to increase public funding going to community foundations in the state. CMF tends to identify issues in which there is community need and for which community foundations are particularly well suited, to create programs around these, and to match them with appropriate funders. While many funders adopt a less prescriptive approach to their work with community foundations, this has been a very successful model for Michigan's community foundations.

***E. Individual Community Foundations:*** Some community foundations provide yet another model through proactive strategies of building relationships with a variety of private and national funders. One example is the East Bay Community Foundation (EBCF), which shapes its own Initiatives through its organizational values, mission and objectives, and then seeks out private funders (as well as public sector resources) with common interests to support them. EBCF's Arts Education Initiative, for example, currently receives funding from Kraft Foods, the James Irvine Foundation, the San Francisco Foundation, the Zellerbach Foundation, the Hearst Foundation, and the National Endowment for the Arts.

A handful of community foundations around the country turn up as "usual suspects" participating in a variety of national and private funder initiatives, suggesting that they too have adopted strategies of building such relationships and maximizing participation to advance their own initiatives, programmatic objectives, and organizational development. Some of these are: the Greater New Orleans Foundation, East Tennessee Foundation, Milwaukee Foundation, Seattle Community Foundation, New Mexico Community Foundation, and Humboldt Area Foundation.

#### **IV. Analysis: Varied Approaches.**

The Initiatives profiled in Section II illustrate a variety of approaches regarding characteristics of the funders, the community foundations, and their relationship; the degree of weight given to programmatic versus capacity building goals among both parties; and the driving interests of the private funders and the community foundations. Table I below illustrates the variations in these characteristics across the initiatives.

While most of the initiatives are funded and created by a single national, regional or statewide private foundation, some are funding collaboratives among two or more private funders. Community foundation participants are selected through an RFP or internal process; in many cases distribution over the funder's geographical domain is an important factor. Community foundation participation can be driven by: the funder's selection process; a community foundation organization that may then serve as an intermediary for the initiative; or the efforts of individual community foundations to recruit private funders in support of their own initiatives.

Most of these initiatives represent some combination of both programmatic and organizational development interests as driver, on the part of both the private funders and the community foundations. But there is wide variation in the relative importance

assigned to each of these interests, and whether one is seen as a necessary component of achieving the other, or rather as a beneficial byproduct of the other.

The Robert Wood Johnson initiative, for example, is driven by specific programmatic interests on the part of the funder relating to quality of health and health care at the local level. The community foundations that are selected as partners are driven by the same programmatic interest. Where organizational development and capacity building occurs among community foundations as a result of participation in the initiative, this is a positive externality, rather than an explicitly anticipated or desired outcome. Similarly, the Lila Wallace-Reader's Digest Fund, National AIDS Fund, and National Lesbian and Gay Community Funding Partnership initiatives are driven almost exclusively by their funders' programmatic interests in increasing participation in the arts, fighting HIV/AIDS, and increasing philanthropic funding for lesbian and gay issues, respectively.

At the other end of the spectrum, the Kresge Foundation, Lilly Endowment, and Packard Foundation initiatives are driven by these funders' goals of improving community foundation capacity within their regions. Programmatic interests are secondary or absent from these initiatives. Even when capacity building is the driving interest, reasons for this vary from funder to funder and initiative to initiative. The Kresge Foundation initiative, for example, seeks to increase community foundations' permanently endowed assets in order to enhance the philanthropic resources available to communities. The Lilly Endowment's GIFT initiative aims to create or strengthen vehicles in each of Indiana's counties to identify priorities and distribute resources to communities. In Packard's case, the organizational development goal also applies to nonprofit organizations; building community foundations is a step to building capacity among the community foundation's own grantees. In the case of the Mott Foundation and others, building community foundation capacity also serves the private funder's interest in developing strategic local partners to improve the efficiency and effectiveness of its own grantmaking.

Most of the Initiatives profiled here lie somewhere in between the two ends of this spectrum, combining programmatic and capacity building interests in varying proportions. In most cases where both goals are present, programmatic goals tend to be served by capacity building among community foundations. The California Endowment's Health Partnership seeks to build community foundation capacity in the interests of enhancing their abilities to improve health and health care for residents of their respective communities. The Great Lakes Community Foundations Environmental Collaborative seeks to build community foundation capacity to make them effective agents of environmental change.

An exception to this trend is the Irvine Foundation's Community Foundations Initiative, in which capacity building goals are served by programmatic development. In this initiative, community foundations are funded to simultaneously pursue work on a priority community concern (of their own choice) and undertake organizational development, in order to strengthen the community foundations' grantmaking capabilities, increase their substantive expertise and abilities to manage community relations, and build them into

effective and viable partners with the Irvine Foundation in serving their respective communities.

Such comprehensive initiatives as the Casey Foundation’s Making Connections Initiative, the Kellogg Foundation’s Michigan Community Foundations’ Youth Project, the Ford Foundation’s Rural Development and Community Foundations Initiative, the Hewlett Foundation’s Neighborhood Improvement Initiative, the Knight Foundation’s Community Partners Program, the Mott Foundation’s Neighborhoods Small Grants Program, and others seek to impact substantive issue areas and community foundation capacity simultaneously. The goals of these initiatives are so overarching – typically seeking to improve quality of life in selected sites – that they require community level programmatic decision making and priority setting. Because of the comprehensive nature of community foundations’ work in a community, they are well suited to take on the role of coordinating these processes. It follows that building strong and well-positioned community foundations to coordinate these community level activities is a prerequisite component of the overall program. In these cases, capacity building goes hand in hand with programmatic interests; private funders and community foundations are in agreement that neither can be accomplished in the absence of the other.

Closely related to these driving interests in programmatic goals and organizational development are the desired outcomes with which funders and community foundations enter into these relationships. Private funders can be driven by interests in: increasing local access and knowledge, improving the efficiency and effectiveness of their own grantmaking at the local level, seeding programs that can become self-sustaining in communities, and/or creating the infrastructure for better philanthropy overall. Community foundations can share these interests with private funders, and can also be motivated by: increased access to new opportunities and resources, enhanced abilities to engage their own Boards and communities, opportunities for collective learning, and/or the prestige and credibility afforded to them by the association. Although the interests that drive private funders and community foundations to enter into these types of initiatives and relationships will never be identical, the outcomes tend to be more successful when there is a clear understanding of what drives each, and a good match between them.

**Table I: Variations in Initiative Types and Characteristics**

<b>FUNDER/INITIATIVE</b>	<b>RELATIONSHIP TYPE</b>	<b>PRIVATE FUNDER AND C.F. DRIVERS: CAPACITY BUILDING/PROGRAMMATIC INTERESTS</b>	<b>NOTES</b>
Annie E. Casey Foundation, Making Connections: A Neighborhood Transformation/Family Development Initiative	Single national private funder; involvement of c.f.’s and other organizations in 22	Primary goal: improve quality of life for children and families in target communities; c.f. capacity building as one component objective	Not limited to c.f.’s. Both programmatic and capacity building interests are shared by national funder

	target neighborhoods		and community foundations
California Endowment, Health Partnership	Single national private funder; c.f. organization as intermediary	Programmatic interest: improve health and health care in selected communities; c.f. capacity building as one component objective	
Ford Foundation, Rural Development and Community Foundations Initiative	Single national private funder; c.f. selection driven by community and organizational factors	Programmatic interest: combating rural poverty; c.f. capacity building as one component objective	Capacity building includes building endowment and learning how to do grantmaking focused on rural community development, as well as increasing the capacity of the c.f. to fully serve its rural territory
William and Flora Hewlett Foundation, Neighborhood Improvement Initiative	Single regional private funder; three selected c.f.'s	Comprehensive initiative to improve quality of life; c.f. capacity building as one component objective	
James Irvine Foundation, Community Foundation Initiative	Single regional private funder; seven selected c.f.'s	Capacity building is primary driver; issue-based program development as one component objective	Focus of programmatic work is determined by c.f.
Robert Wood Johnson Foundation, Local Initiative Funding Partners Program	Single national private funder; local partners determined through RFP process	Programmatic interest: improving health and health care in target communities; organizational capacity building as lower priority	Not limited to c.f.'s
W.K. Kellogg Foundation, Michigan Community Foundations' Youth Project	Single regional private funder; c.f. organization as intermediary	Combines issue-oriented goals (increasing youth volunteerism) with capacity building and organizational development objectives	
John S. and James L. Knight Foundation, Community Partners Program	Single national private funder; c.f.'s among local partners in selected communities	Comprehensive initiative to improve quality of life; organizational capacity building as secondary	Not limited to c.f.'s
Kresge Foundation, Partnership to Raise Community Capital	Single national private funder; six selected c.f.'s	Capacity building initiative	One objective is to promote strong partnerships between community foundations and nonprofit organizations, donors, and financial institutions in their respective communities.
Lilly Endowment, Giving Indiana Funds for Tomorrow (GIFT) Initiative	One regional private funder; c.f.'s in communities	Statewide capacity building initiative	Included creating new c.f.'s to provide statewide coverage

	statewide (Indiana)		
Charles Stewart Mott Foundation, Neighborhoods Small Grants Program	Single national private funder; multiple c.f.'s	Programmatic and capacity building interests	Mott interests include developing local partners that can improve the effectiveness of Mott's grantmaking; Mott Foundation is also interested in building the field of community foundations internationally
Great Lakes Community Foundations Environmental Collaborative	Collaborative among two national and regional private funders; c.f. organization as intermediary	Programmatic interests in regional environmental protection as driver; capacity building objectives as secondary	Funders and intermediary organization share interest in creating model of c.f.'s as effecting environmental change
David and Lucile Packard Foundation, Community Foundations Initiative on Management Assistance And Emerging California Community Foundations Initiative	Single regional private funder; total of 20 California c.f.'s	Capacity building initiatives	Funder driven by interest in building capacity of both community foundations and nonprofit organizations
Pew Charitable Trusts, Neighborhood Preservation Initiative	Single national private funder; c.f.'s in nine selected target communities	Programmatic and capacity building interests	
Lila Wallace-Reader's Digest Fund, Community Partnerships for Cultural Participation Program	Single national private funder; ten c.f. partners	Programmatic interest in strengthening local participation in arts and culture as primary driver	
National AIDS Fund	National funder collaborative; local partners in selected communities	Programmatic interest in fighting HIV/AIDS as driver	Not limited to c.f.'s
National Lesbian and Gay Community Funding Partnership	National funder collaborative; multiple c.f. partners	Programmatic interest in impacting the chronic pattern of under-funding of lesbian, gay, bisexual and transgender programs as driver	C.f.'s apply for matching grants through an annual RFP process

## V. Learning: Ingredients for Success.

These initiatives have given rise to a body of learning about predictors of success in private funder – community foundation relationships. The following ingredients for success are drawn from evaluative documents arising from these initiatives; numerous

interviews with private foundation, community foundation, and organizational representatives; and conclusions reached in forums designed to examine these questions.

***A. Importance of program structure and attitude:*** This refers to the attitude of the private foundation regarding its relationship with the community foundation participants in the initiative, and is particularly significant in the eyes of community foundation participants. Community foundation representatives report that when the private foundation approaches them as equal partners – recognizing that each plays a unique and vital role in the philanthropic community – both parties are more likely to achieve their own and jointly desired outcomes. Conversely, when the private funder approaches community foundations as in a grantee-grantor relationship, resentment is more likely to be generated and the full potential of the community foundations to contribute to the initiative is not realized, resulting in a less successful initiative overall.

There are variations in outlook regarding appropriate respective roles for the parties in agenda setting and strategy formation as the relationships and initiatives are shaped. Even within the context of approaching the relationship as equal partners, outlook on these questions tends to follow the type of desired outcomes identified by the private funder in designing the initiative; a preponderance of programmatic interests tends to lead to the designing of a more prescriptive initiative while a preponderance of capacity building interest tends to allow community foundations more latitude in how grants are used. This is not always the case; several capacity building initiatives include match requirements, requirements that a percentage of the funding generated be applied to building endowments, and other restrictions on the use of funds.

Some private funders report that including such requirements increases the likelihood that desired outcomes will be achieved – especially with regard to building the long-term sustainability of institutions and programs. But many private funders also agree with community foundations that the overall relationship works better if the private funder restricts its prescriptiveness to outlining initiative goals and objectives, and gives the community foundations latitude in determining how best to implement the program within their own respective communities. Some feel that it works even better if the community foundations act as partners in formulating the initiative goals and objectives at the front end. Regardless of which outlook prevails in a given case, the outlook and expectations regarding this issue should be shared by the private funder(s) and the community foundations involved in the initiative.

***B. Long-Term Outlook:*** There is virtual unanimity that these initiatives must take a long-term view, including multi-year grants and evaluative horizons. Very few of the profiled initiatives – and none of the capacity building initiatives – take a less than three-year outlook. Many feel that a five or ten-year horizon is more appropriate to the types of organizational development and relationship building that are hallmarks of a successful initiative.

***C. Variations among community foundations:*** Community foundations vary widely in developmental stage, resources, and capacity. Many private funders reported learning

through these initiatives the degree and significance of this variation. It is important that the private funder be aware of the range in the community foundations field and among those with whom it will work. This may require structuring different levels of participation, with emphasis on technical assistance, shared learning, training, and leadership development offered at the initial levels.

***D. Importance of Technical Assistance:*** Several private funders and community foundations report that the success of these initiatives is largely due to the provision of technical assistance. Others point to the importance of shared learning through regular initiative convenings. Several community foundations would not otherwise have access to these developmental gatherings and tools; they should be built in to the initiative at the design stage – especially when capacity building is an initiative goal. In a few cases, technical assistance and learning functions are delegated to an intermediary organization such as the Aspen Institute, the League of California Foundations or the Council of Michigan Foundations. In some cases, the private funder takes on this role itself. In either case, participants report that when these efforts are structured to include a representative of the private foundation in regular learning sessions, an added benefit can be that the private funder also benefits from shared learning through the initiative.

***E. Not a universal model:*** A few community foundations point out that it is not always in the interest of every community foundation to participate in every private funder initiative. Community foundations should ask themselves whether they have the capacity to take on the new work, even with the additional funding it would bring. They should consider whether the timing is right for them and whether the private foundation’s desired outcomes are consistent with their own. More established community foundations, in particular, but even some smaller, newer community foundations, should also ask whether the work being asked of them is consistent with their own missions, values, priorities, and existing programs, and whether the new work could detract from existing programs and goals. It is helpful if the private funder can consider such issues in making its selection of community foundation partners as well. When desired outcomes are consistent, when all parties’ interests are served by the collaboration, and when the underlying goals and values are matched, the partnership is likely to become a long-term success.

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As many of the profiled initiatives begin to sunset, and as the body of experience and learning grows, both private and community foundation partners are increasingly able to enter into these relationships with clear expectations and prescriptions for success. As the field of community foundations matures, community foundations are increasingly well-positioned to work as full partners with private funders to achieve mutually desired outcomes at the local level. And as private foundations re-examine their grantmaking processes in light of a changing financial climate, they will be increasingly open to partnership and collaboration, and to viewing these community foundation partners in a new light. This is a moment that is ripe for community foundation organizing to

articulate the benefits of partnership and to shape initiatives that simultaneously advance their own interests, benefit private funders, and achieve mutually desired local outcomes. It is a moment for designing the next generation of private–community foundation initiatives and relationships.