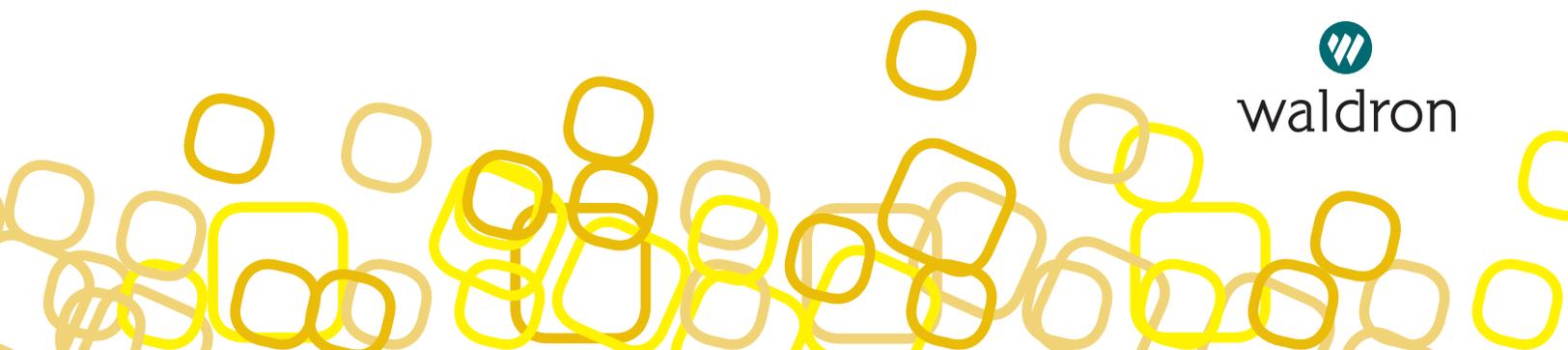




Interview Series

COMMUNITY FOUNDATIONS



waldron

INTRODUCTION

INTERVIEW SERIES: COMMUNITY FOUNDATIONS

Waldron recently launched an interview series with CEOs, Executive Directors, and other leaders to find out their thoughts on management and talent. We decided to kick off this series with a focus on community foundations. The following compilation of interviews includes prominent leaders of community foundations across the country. The discussions give us a glimpse into the leaders' experiences, and an opportunity to create conversations around what community foundations require, and how those needs can be met.

INTERVIEWER: ED ROGAN, VICE PRESIDENT, WALDRON

Ed has been with Waldron since 1995 and is one of Waldron's most experienced executive search leaders. He manages a diverse portfolio of searches that includes nonprofit and public sector clients. Prior to Waldron, Ed worked for The Booth Research Group (BRG) in Denver, CO designing and conducting assessment centers and promotional tests for public safety agencies across the country. Ed holds Bachelor's degrees in Psychology and Sociology from University of Houston and a Master's degree in Industrial/Organizational Psychology from University of Colorado at Denver.

WALDRON

As the consulting partner strategic leaders choose to help attract, engage, and inspire effective leaders, Waldron provides a unique combination of executive search, leadership development and career transition services across sectors and industries. Our passion is helping people and organizations realize their full potential and increase their impact. We are proud to be a Certified B Corporation™.



CONTENTS



COMMUNITY FOUNDATION OF COLLIER COUNTY
Eileen Connolly-Keesler, President & CEO

3



COMMUNITY FOUNDATION OF THE OZARKS
Brian Fogle, President & CEO

6



IDAHO COMMUNITY FOUNDATION
Bob Hoover, President & CEO

10



KANSAS ASSOCIATION OF COMMUNITY FOUNDATIONS
Svetlana Pushkareva Hutfles, Executive Director

12



TOLEDO COMMUNITY FOUNDATION
Keith Burwell, President & CEO

14



WACO FOUNDATION
Ashley Allison, Executive Director

17

EILEEN CONNOLLY-KEESLER

COMMUNITY FOUNDATION OF COLLIER COUNTY, President & CEO
NAPLES, FL



The Community Foundation of Collier County was incorporated in 1985 to build support for local philanthropy and an endowment to help sustain local charities. The foundation is also building The Collier County Philanthropic Knowledge Center, to keep track of the critical gaps between needed services and available resources, strengthen and sustain local charities, and educate the community, donors and nonprofits.

Before taking on the role of President and CEO in early 2013, Eileen served as President and CEO of Oshkosh Area Community Foundation and Executive Director of Christine Ann Domestic Abuse Services.

Q *My first question is where do you see your current talent challenges as far as acquisition, development, and retention?*

A Well, I've been at this foundation for only nine months. I ran the Oshkosh Area Community Foundation for almost 14 years, so when a new President comes in you get some staff turnover and we've had that here. I think for whatever reason it's really tough to find people to move or who have a community foundation background or knowledge. I'm kind of surprised how few people are willing to do that or the lack of knowledge about community foundations. This industry has been around almost 100 years. There are approximately 800 of us nationwide but not a lot of people have the experience.

Q *Recently, the Fremont Area Foundation hired a local person with fundraising experience. She didn't have any community foundation experience. I've also found during my outreach and the recruitments I've done when I talk to people in the community foundation world that their focus is on the place and commitment to the community as opposed to looking at a career opportunity in another location. So I'm curious if that's what you're encountering as well.*

A I guess that's part of it. I had four positions open here. For one, I hired a local person. I don't even think I put it out on the listserv. The other three I did put on the listserv, and we hired a CFO from Hudson Valley Community Foundation. She was attracted to the location. She's a little bit older and she's sick of snow. You can generally get people from the Midwest to look at this type of position here. That said, it's tough to uproot families especially with kids in school.

Q *What motivated you to make the change when you moved to Florida?*

A I lived in Oshkosh, Wisconsin and had been coming to Naples about eight years to work with my biggest donors who are here in Naples. So I got to know the community. We bought a place two years ago thinking that someday we would retire here. And then I saw this job come up and I thought, "Are you kidding me?" So I was done with Wisconsin weather. I mean, I love the community, I love the people, I love that foundation but I just can't take six months of snow anymore.

Q *And what have you been looking for in candidates? If there were several things in particular that you look for in employees for a position with a community foundation, what would those things be?*

A Do they understand customer service? Really understand customer service. That is the most important thing for me because that's the biggest thing we have to provide to our donors, our nonprofits, and to the community in general. Do they, again, have any knowledge of what a community foundation is and why we operate the way we do? That saves you two years of training if they are familiar with community foundations, because it takes that long for people to really understand what we're doing. The donor service person I hired has been here 15 years, knew the community and the players, and that makes it much easier for that type of position. I really like to hear people talk about what they do for their customers; that really is a big one for me.



Q *Given that nonprofits often can't match for-profit salaries, especially during recent economic challenges, have you found any non-monetary incentives or methods that help retain or attract staff?*

A Yes, and it wasn't even tied especially to the economy although there were some things I did in Oshkosh in 2008. Flextime is one of the most important things, whether they have kids or parents they're taking care of. Doctor appointments, all of those kinds of things—you just let them go. I don't flex it so much that people are in here on Saturdays and Sundays working and not coming in during the week, because we're a small staff of nine. Someone has to be here to answer the phones and deal with people as they come in the door, but as much flextime as possible. During summers, particularly in Wisconsin, although I do it here too, I let people work nine-hour days and then leave at noon on Fridays. Or four ten-hour days. In Wisconsin you've got three months that it pays to live there. Not to mention it's dead on Friday afternoons, and here in Naples it's dead all summer. So to give people that, because a lot of people, particularly people in their 50s who work here, would say vacation or time off is by far more important than anything else. So it was a big piece that I did there and that I did here this summer.

Q *I realize you've only been in your current position a few months, but have you been working on a succession plan for yourself with the organization and the Board?*

A Not yet. There's been so much that we've had to do these nine months because we really were acting like an operating foundation. For the last six years, we had to make so many changes to get back on the road to being a community foundation. It has come up, what's the long-term plan? I kind of see myself here seven years maybe and then I probably want to be done. So there is some awareness of my future retirement. The Board in the back of their heads needs to think, "If we hire a new CFO maybe someday he or she will be the President." We don't hire based on that though. If it evolves, that's fabulous. But right now the skills we need are a, b, and c, and those aren't to fill my spot. Hopefully, I'm healthy and can give them a year's notice. If not, the succession plan I had in Oshkosh was: if I get hit by a bus, here's plan A; if I give notice, here's plan B; if I can give major notice, here's plan C. And that all involves having a consultant come in to help hire and put someone in place. In Oshkosh, we actually listed the people. The list included past Board chairs who spent a lot of time at the foundation. There was also one particular staff person who could step up. So while it's ideal to put together this succession plan, we might just hire and get that person up to speed.

Q *You mentioned having brought in a donor relations person recently. Regarding development staff, I understand that 18-24 months is a pretty good tenure and I'm curious what you experienced with bringing in development professionals and finding ways to retain them beyond the average length of time.*

A In Oshkosh I brought in a development person and after three years I shifted them to more donor services than actual development. Because they had brought all those people in and they were having a hard time letting go of them. That shift seemed to work to keep her. She's been there seven years, because her job could change to do what she wanted to do, which was to work with those donors. And it also worked well for the donors. Here, we don't have a development person. I kind of see the whole staff as having to participate in development. We're all in this together but right now our corpus is over \$50 million. So we're in a position where we cannot hire any staff right now. We've got to get assets up.

Q *Could you give me a sense of your vision and how things are moving forward? What role might the foundation play in the community moving forward?*

A Well, going back to where we were, we started taking on programs like the Nonprofit Center and 211, so almost all of our unrestricted dollars were being sent back by us to run these programs, which meant no grantmaking was happening. So you take that away, what does the community see? What do the nonprofits see? They see you as a competitor because you're out there writing grants to feed yourself and these programs. It creates a weird community dynamic. Now we have spun off all the programs. The university here has taken the Nonprofit Center; United Way has taken 211. We're moving everything out and we're taking the unrestricted and going back to doing program grantmaking. It's weird in Florida compared to the Midwest. Agencies do not have endowments here. There are only three organizations with big endowments, the rest have barely anything. So we've spent a lot of time talking about how we need to partner with nonprofits. The nonprofits are beginning to



see us as more of a partner. The Transfer of Wealth study was just finished here in Florida, which was perfect timing for me. We did that study in Wisconsin about eight years ago, so I know the study well. I've been meeting with advisors, nonprofits, and other organizations, talking about this transfer of wealth and how people need to start considering Naples as their home, because they're domiciled here. There are huge problems here, which people probably don't even see when they come. They visit downtown, Pelican Bay, and places where the homeless and their needs are not visible. But in East Naples, we have schools that are 90% free and offer reduced lunch. We have Habitat neighborhoods of 200-300 homes all next to each other. We don't have a senior center here. There are a lot of issues. As we transition to getting the nonprofits to trust us again, and start building endowments to help them with sustainability, I think the community will start seeing us. Until recently, we didn't have a marketing person to do external marketing out in the community about who and what we are. It's like we were starting with a blank slate. Hopefully it will lead us to those big community leadership projects. That's what we did in Oshkosh and were able to grow from \$20 million to now \$90 million there.

Q *Did you have to commit support or funding to those other agencies when you spun off the programs?*

A

Yes we did. We made a three-year grant commitment to each one of them.

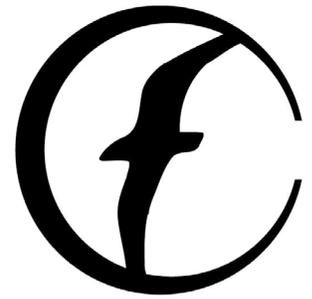
Q *If you were sitting across from someone considering a career in philanthropy and pursuing a similar career to yours in community foundations, what advice might you give?*

A

I actually served on the UW Board of Regents in the middle of all of this, and I had the opportunity to spend a lot of time with students and discuss where they are going with their careers. I tell everybody: look at a community foundation. You have so many options. If you like the grantmaking part, consider being a program person in a community foundation where you're organizing those grants and working with committees. Being able to make that difference on the ground with nonprofits is amazing. If you like working with donors, there are opportunities to sit down and help them figure out what legacy they want to leave in community foundations. If you like administration and want to be a CFO or an accountant in a community foundation, there's a niche here. As I said, I'm having a hard time finding people with that experience because it's a niche. And when you learn that niche, it allows you to be able to move where you want to go. There are jobs all the time on the Council on Foundations listserv. With the experience, you can move into private foundations or corporate foundations. Just get that foundation background. You have to love it and have some passion for philanthropy. And if you've got that passion, you can succeed in the community foundation world.

BRIAN FOGLE

COMMUNITY FOUNDATION OF THE OZARKS, President & CEO
SPRINGFIELD, MO



Founded in 1973, the Community Foundation of the Ozarks is a public foundation serving the Missouri Ozarks. CFO has grown to include 44 affiliate Community Foundations and more than 2,500 charitable funds. The Foundation's mission is to enhance the quality of life in its region through resource development, community grantmaking, collaboration, and public leadership.

Brian grew up in Aurora, Missouri. Before taking on the President and CEO role of CFO in 2008, Brian spent nearly three decades in banking, the last 15 of which were in community development.

Q *Have you been involved with philanthropy previously, in a volunteer or personal capacity?*

A I volunteered and I've been on several committees here at the Community Foundation. And actually, it's funny how it turned out. I started a community development corporation (CDC) in the bank I was working with at the time, which allowed us to get into real estate and affordable housing investments as long as we stayed within banking regulations and the projects benefitted low to moderate income populations or neighborhoods. The Community Foundation was located in an office tower downtown, and Gary, my predecessor, was looking at moving. He said "I don't want to move from downtown, but I've got this donor who's considering giving some land way out on the south side, which is a more affluent area." And he said "I think that just sends the wrong message as to what we're trying to do for the community." So I made a proposal to him and the Board. I offered to build a building downtown. Since we had very cheap capital at the bank, we made the rent very affordable. So the building that I sit in today was one that I developed and constructed through the RCDC and then the Community Foundation ended up (it was a lease purchase) purchasing it from us. In a million years I didn't dream I'd end up in the building that I developed for the Community Foundation. I had some great connections with them. I thought I was familiar with what they did, but I just didn't have any idea all the things they were into until Gary and I started visiting.

Q *Given the size of the organization, and the location, what do you see right now as your most significant talent-related challenges? What have you been running into lately?*

A We have 16 full time staff members and have been very fortunate. In my five years here, we've lost only one person who was more of a senior person. We have lost a couple of clerical staff, but again, it wasn't such a huge impact to us. Our biggest competitor, or challenge for talent is the private sector. Money managers or trust departments, that are related and get to know our staff through their work with us, have tried to hire a couple of people away. We've been fortunate to be able to retain them. But that's the toughest thing I've encountered so far. And it's just that they've got profit sharing and other things that we don't have, although we pay very well for our region. We're a very low-cost region, so salaries are generally much lower than they are on the coasts, or even in St. Louis, or Kansas City. The private sector pays more than we're able to and that's our biggest challenge.

Q *Have you found any effective non-financial methods to reward employees, or keep them engaged and involved?*

A The associates we were able to keep, we take care of them the best we can, and have done that very freely and openly where they do not ever have to come to us and say, "I think I deserve more." We have several high-performing young people, and it's very critical to me that we keep them. Fortunately, we have some committed senior staff members in the latter part of their careers that are willing to sacrifice their own compensation increases to help benefit our younger associates. And the main thing I try to appeal to them with is we're a very fast growing organization, and there's going to be tremendous opportunity. In 1999, we had \$25 million in assets, and today we have \$230 million in assets. We've had really good growth both geographically



and in fund size. That presents a lot of opportunities and that's how we've been able to hire some really good, young people and, so far, been able to retain them.

Q *What accounted for the growth you mentioned?*

A We're 40 years old this year and I think there comes that tipping point where all of a sudden people just get the community foundation concept. We're a regional community foundation with 44 affiliates throughout southern Missouri. That has been our fastest growing segment both in numbers and in their own growth. One of our affiliates is now worth over \$10 million in assets. I think it's been a combination of regional growth and awareness. I've had calls in the last month from two communities, on the other side of the state, that are interested in affiliating with us. We didn't even reach out to them, they were reaching out to us. So I think that regional growth is a big part of it. The other thing we've done is maintain a strong focus on our professional advisors. We go around to our trust attorneys and money managers and keep in touch with them. We've had a lot of good referrals by trying to keep them closer to us. We also started something three years ago, called the rural schools partnership and that's working with school districts and trying to get them to start their own school foundations. We're up to about \$20 million in assets with them and around 110 school districts. So those have been the three areas of growth.

Q *From a development perspective, looking for fundraisers, historically, and certainly in the last number of years, those folks have been very difficult to identify, recruit and then retain for any length of time. Have you had a similar experience, or do you have a view on development professionals and related challenges?*

A Absolutely. You're spot on, that is our highest turnover. We work very closely, obviously, with nonprofits and we have about 480 funds with nonprofits. And again, that's our largest single category of funds. 37% of our assets are with nonprofits that have funds with us. We receive a lot of emails when they're looking for people and the average that I'm seeing locally is less than two years with their development people. We haven't yet grown in this sophistication so we call them development people, but what they've ended up being is event planners. That seems to be how everyone is starting to raise money putting on event after event after event. And I think it burns them out. We keep talking to them about the need to professionalize their development staff to go out and court donors and service donors and do planned giving and true development work. We offer workshops on that. I think intuitively they get it but we just don't have those types of people, other than some universities here that have folks who do that. In the nonprofit sector they're often event planners and that's a big issue.

Q *Now for the people who have stayed with you and continued to excel in their roles, do you see any sort of characteristics or attributes that they have in common? If so, are those things that you look for when interviewing and recruiting other people?*

A Looking at the hires we've made since I've been here, the commonality is that we've been able to get some really good people coming straight out of school and they embrace education. And so, more than half our staff has a post-graduate degree. They see education as very, very important, and they want to continue learning and that has carried over while here. They want to learn more about what we do and how we do it. So this eagerness, curiosity, and embracing of education has probably been the most key commonality. The second one, and it may be just as important, is a passion for what we do. I mean, we've got folks here who love what a community foundation stands for; our mission statement is that we want to improve the quality of life for everyone in the Ozarks. And they come to work each day believing in that mission. So curiosity and continued learning, and believing in our mission are the two commonalities that I'm seeing.

Q *What are your succession plans; are you thinking of a successor? You mentioned being tapped by your predecessor while you were external to the organization. Are you trying to develop any internal talent one day to eventually succeed you?*

A We have two or three people here who I think would certainly be that leadership material with more experience. And again, they're younger folks I would compare to anybody, even in the private sector. They're sharp, they're eager, they're talented, and ambitious and I think they're not there yet. We've kind of got an unusual personnel situation; as is about half of our people are close to retirement in the next three or four years. And I worry about that. We've got the other half of our staff that is, 32, 33, or below. And we don't have



the in between age segment. So we're kind of a barbell and I do worry about if every one of our senior staff started retiring at the same time. I don't know if we have the younger people groomed to step into their place quite yet. I hope we can get there before they do retire. Our CFO is the one I worry about the most. She's been here the longest and was our first hire back in 1988 and she knows everything. She's got a great staff but they just don't have all that experience and knowledge yet.

Q *Is your Board involved in some of these discussions and how open are all of you about these succession and development issues?*

A I think we could do a much better job of that, and again I've started having those discussions. My plans are to stick around here, I'm just 57 and plan on working until retirement so I have no plans to go anywhere soon. But I do think it's important to start thinking about succession planning, and I have shared that with our executive committee. We're in agreement that one of our senior staff people would be an interim solution and they need to start thinking about the longer-term solution. Would we look internally? Would we do a nation-wide search? And we're not there yet, but at least we've started having discussions about it.

Q *What would you tell people considering a career in a community foundation? What's the one piece of advice that you wish you had heard or that you think would be most beneficial to someone contemplating a similar career?*

A Before joining a community foundation, I thought of the foundation world and the larger philanthropy world as staid and conservative, and just a grantmaker. What I have found is that it's an exciting field. One can be entrepreneurial in the sense of "Let's talk creatively about how we can solve community issues and problems." And I just think it's not our father's community foundation and so it does have excitement. We've been able to attract some really strong, young folks because they see that vision. One of our star young people says, "What I love about here is I come to work and I never know day-to-day what new thing I'm going to run into." We're excited by the challenges we encounter. So I think it's an exciting field, believe it or not. People don't typically think of philanthropy as exciting. I think it is.

Q *I've worked with a number of community foundations and probably talked with 10X more people in the field than that. And the foundation roles vary. The philosophy that leaders bring to community foundations varies pretty dramatically from one organization to another. Some are very responsive to what comes in the door and to the organizations that approach them or apply for grants. Others are very proactive and convene community leaders and discussions, and really assess the needs of the community and then make strategic investments to address them. Where do you see your foundation on that spectrum?*

A One of the things that really attracted me to this foundation is that we are not reactionary and I give credit to my predecessor, Gary. What I admired so much was the role they play. They were leaders, conveners, and change-makers versus being reactive, sitting back and letting people come to them with problems. We were behind several large community initiatives here that I think were really transformative, and again, those kind of emanated from us versus us just being a part of them. So we would be in the latter category and again that was the direction that Gary set.

Q *Do you see a change in that philosophy, locally or nationally? Where do you personally see community foundations moving in the future?*

A I could stand to learn a lot more. I've had the privilege of meeting several people in the Midwest, so I am learning about what other community foundations are doing but I wish I had more knowledge about what others are doing outside of this region. I'm attending my first Council on Foundations conference this year. So, we haven't been as plugged in, working and networking with others, as we probably needed to be. But I do get calls from other foundations saying "I hear you all are doing this or are doing that," so I think there is an interest in taking what a traditional community foundation does and being more expansive. When I first got here, my banking background served me well and we started mission-related investing where we're now doing direct investments in communities. We've provided loans to rural emergency rooms and lease purchase with a rural school that got a big biomass heater. We're doing some creative financing with the large capital base we have.



We see that as very much part of our mission as well. So I think we're doing some pretty interesting things and it's just listening and saying, "yes". What I love about our staff is we hate to say no. So we really try and figure out how we can help. And if you're a nonprofit or community that has a problem, how can we help you solve that versus just saying "no, we only give grants."

Q *I'm curious, from a more personal perspective what or who you may have found to be inspirational or motivational in your own career.*

A Again, I would cite my predecessor as the person who I think set our organization in motion to really be entrepreneurial, responsive, and expansive in really looking at how can we help communities. We're doing more than just traditional grantmaking. We've tried to not only continue that, but also expand it further in many of the things we're trying to do and we've invested a lot. We now have our own crowd-funding platform that we developed with a local technology firm. It's suited to community foundation work instead of Kickstarter or similar platforms that are more for the private sector. So I think we've really tried to be expansive, and I give Gary the credit for that. I've had some really good mentoring in my community development world and folks that I saw were so passionate and wanted to make the world a better place. I learned from them and saw how they did it on the banking side and tried to bring some of those same principles over here. A lot of times you're talking about capital and we just offer capital in a slightly different world than banks do. But often times, it's those capital and resources that communities need to help them grow and thrive.

BOB HOOVER

IDAHO COMMUNITY FOUNDATION, President & CEO
BOISE, ID



Q *How have you seen ICF evolve since you started there?*

A We're definitely growing. Our financial goal was to grow the endowment from \$42 million to \$100 million. We will likely reach \$95 million in the endowment by the close of 2013, plus another \$20 million in non-endowed funds for a total of \$115 million in total assets. A key part of the initiative was to increase ICF's visibility statewide. Of course this financial goal is directly related to our mission of enriching the quality of life throughout Idaho.

Q *That's great. What strategies do you use to increase your visibility?*

A There are several factors associated with our increased visibility. First, we rearranged staff positions so that our Boise-based staff traveled across the state to visit with people and nonprofits for two weeks each month while spending the remainder of the month in the Boise/Southwest Idaho area. This allowed for the development of new funds and stronger relationships with current funders. In the last year, we added staff in North Idaho based in Coeur d'Alene and Idaho Falls for Eastern Idaho, allowing our Boise-based staff to increase their focus on the Southwest Idaho area—which has the largest population in Idaho.

Second, we expanded the ICF Board of Directors from 18 to 30 people. That meant 16 people from outside Southwest Idaho and the remaining 14 from the Southwest. Of the Southwest directors, just six are from Boise. This expansion provides increased coverage of the state and greater opportunities for contacts in Boise but especially in Idaho's other regions—very important in a state so geographically fragmented with natural barriers of mountains and water.

Third, we have long offered a major friend-raising luncheon in Boise at which a major personality, Bill Gates Sr. has spoken in the past, gives a keynote presentation about philanthropy. Four years ago, we added three additional luncheons in other parts of the state—Coeur d'Alene, Sun Valley and Idaho Falls. With the addition of these new events we went from 500 attendees to over 1,000 and attracted a new following that was very unlikely to travel to the Boise ICF luncheon.

We also took a page from the Oregon Community Foundation and added four leadership councils focused on kids and issues like childhood obesity, pre-school literacy skills, and dental health in the Idaho Panhandle, Magic Valley, Upper Snake River Valley and Southeast Idaho. We borrowed from the Montana Community Foundation and started ICF affiliates through our Together Idaho Program. They receive financial incentives to grow their funds and ICF provides extensive back office services. The affiliates are in small Idaho towns which ICF staff are only able to visit sporadically. However, these affiliates become important additional volunteers in support of growing Idaho's philanthropy.

The increased size of our funding base has also provided an opportunity to significantly increase both our competitive grant program as well as the distribution of funds from donor advised, designated, scholarship, agency and other ICF funds. ICF now has nearly 500 individual funds and has distributed over \$70 million in grants to over 4,000 Idaho nonprofits in the last 22 years. This increased granting capacity to Idaho nonprofits and charitable activities significantly increases ICF's visibility not only with nonprofits but also with potential funders.

For Idaho's charitable individuals and families, ICF provides a wide variety of fully tax-deductible options to support a cherished cause, community or organization now and forever. ICF is the only statewide nonprofit that invests the funds it receives to provide a brighter future for Idahoans tomorrow and forever.

Since 1996, Bob has served the communities of Idaho in the roles of President for The University of Idaho, President for The College of Idaho, and now as President of the Idaho Community Foundation.



Finally, we added a communications staff person with the goal of increasing as well as segmenting our communication through an expanded e-bulletin, Bob's Blog, Facebook, and Twitter feeds.

Q *So are you issue-focused as opposed to geographically focused?*

A No. We are actually focused both ways. Leadership Councils are an example of issue-focused activity while the affiliates represent important geographical community foundation activities.

Q *When you're doing your hiring, what are your biggest challenges now that you're spread out and have grown? What attributes are most important?*

A In hiring the two new regional officers, we were looking for people who were energetic, self-starters, engaging personalities, with nonprofit experience and who had extensive contacts within their region.

Q *Do you think they'll look to an experienced foundation person for your successor?*

A The Board will no doubt undertake planning sessions to develop a clear sense of the next person to assume the CEO position. I started this position in my late 60s and believe that the Board will be looking for someone in their late 40s or 50s with a background in foundations, especially community foundations, and experience in leading a statewide organization such as ours. As a former President of the state's land grant university, I certainly had the latter credentials, but I was clearly short on the knowledge and skills associated with leading a community foundation. They will probably conduct a national search for someone who will provide that leadership for ten to twenty years.

I think it will be an exciting opportunity. Idaho is one of those western states that is expanding in both population and wealth. Boise is a very dynamic city and places like Idaho Falls, Twin Falls and Coeur d'Alene to name just a few have wonderful futures. I think the Board will have an attractive candidate pool for its next major search.

Q *That will make a difference in how they have to devote their time in the early days. One more question—thinking about people entering the field, what sort of advice would/might you give someone who's contemplating a career in community foundation work?*

A My professional life was largely in academia. The first seven years, it was all about how many articles one could publish and how well I taught my classes. A community foundation job allows people with a passion for charitable activities to make them happen and see results. It's an incredibly rewarding position, and tends to attract people who share community goals. All of this means community foundations are some of the best places to work today. I have enjoyed immensely my time with the Idaho Community Foundation and look forward to my remaining years.

SVETLANA PUSHKAREVA HUTFLES

KANSAS ASSOCIATION OF COMMUNITY FOUNDATIONS, Executive Director
HUTCHINSON, KS



The Kansas Association of Community Foundations (KACF) is a membership organization founded in 2005 by a dedicated group of volunteers representing community foundations across the state of Kansas who believe in philanthropy, peer-learning, and statewide partnerships.

Svetlana has been actively involved in developing community foundations worldwide and has served at the Transatlantic Community Foundations Network and Academy, the Worldwide Initiative for Grantmaker Support, and the Global Fund for Community Foundations.

Q *As you speak with your colleagues and the community foundations in Kansas, what are you hearing are their most significant talent-related challenges?*

A A few community foundations in Kansas have had turnover at the Executive Director level. In most cases bright people with good energy come in fresh from other fields and sectors without prior knowledge of the community foundation “model”. It takes a while before a new ED fully understands what a community foundation is all about. You invest in educating them, they commit their time to working very hard in educating themselves and KACF peers extend their support. Then we sometimes lose the talent for economic or family reasons. Also, since at least 50% of community foundations in Kansas are led by volunteer boards, where the chair of the board has to step down after a number of years, the turnover of leadership is naturally high. Some community foundations face the challenge of an “institutional memory” loss and continuity; there is a constant need to educate new board members. KACF is fortunate to bring in experts from outside of the state and to rely on champions from across the state who have stayed in their roles for many years.

Q *When boards replace people, which traits do they look for? Do they search for candidates within the community?*

A Most of the time the foundations end up hiring from within the community, partially due to anticipated challenges associated with attracting new talent to small rural areas. I do believe bringing someone new may have its advantages: no agendas, no baggage, no feet have been stepped on so to speak. However, newcomers do not know the community very well, which can present an issue, as well as an opportunity, if done right. In the history of Kansas that I have observed so far, the person is more likely to be chosen from within the community to capitalize on the valuable trait of knowing the community.

Q *What are the attributes of successful Executive Directors? What do you think they have in common?*

A One they avoid is complacency. You need to have the energy to go far and beyond, even when the job is perceived as well done. Large or small, community foundations cannot afford to sit on millions in endowments and not do much! They push themselves. The Executive Director day does not end at 5 pm. It becomes their life 24/7. It’s their hobby; their passion; the balance of working hard and smart.

And number two is the ability to connect with people. There is something “entertaining” and “fun” about them, they are able to engage with strangers, and to relate to people from diverse walks of life. They find a way to connect with the community.

The third attribute is the ability to see the bigger picture, and not get lost in the administrative routine. At times you have to present the board with new directions and take risks. EDs who can connect the dots and create a strategy out of chaos, tend to persevere.



Q *So thinking about people in high school or starting off in college who might be contemplating a career in the foundation world, what advice would you give?*

A Don't do it if you see it as "just a job". Jokes aside, they need to have a passion for the field, which is complex.

First, it is a perfect merger between corporate and nonprofit life. It is not your typical nonprofit organization. You actually have to run a community foundation like a business but it needs to have the heart of a nonprofit. For those people who can think in a cross-sector manner and have an interest in both, this would be the perfect field to try.

Second, you get to interact with diverse groups in the community from the wealthiest to the poorest and to deal with a wide range of issues that are sometimes controversial and daunting, causing a lot of commotion in the community. Before one pursues this career they need to ask themselves if they are capable of keeping an open mind or if their personal convictions will get in the way. It's the diversity of it, the polarity, and the excitement of dedicating your life not to one but multiple causes, which makes this career equally rewarding and challenging.

Third, they need to be prepared for the workday to never be the same. It's an evolving field where one does not stop learning.

Q *What motivates you to continue working in the field?*

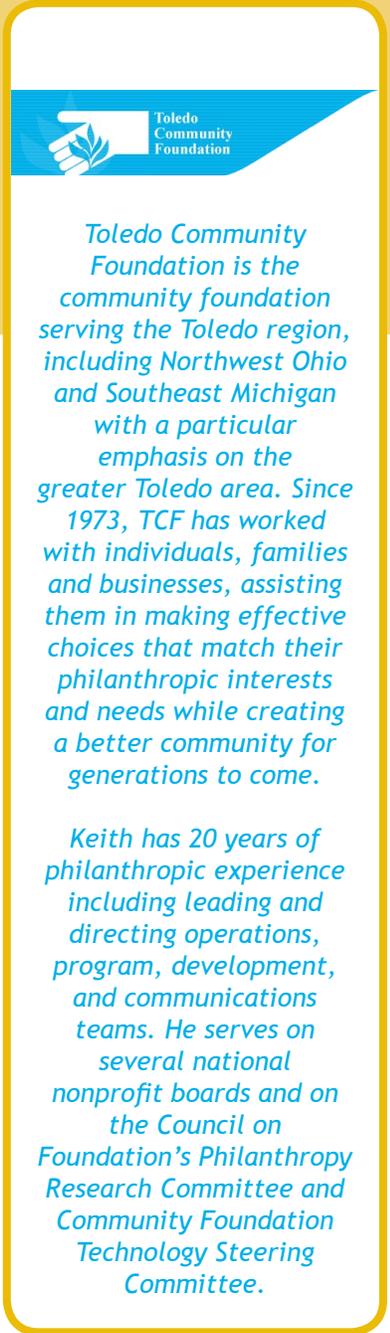
A It gives me chills to think that the work I do on a day-to-day basis, every extra hour I contribute, affects the lives of people, it shapes the future for generations to come! I love the fact that my passion does not discriminate against one issue or the other and I get to help address the multitude of challenges in so many communities. It's the camaraderie and selflessness of people involved in local philanthropy that move and feed me with positive energy on a "bad" day.

Q *Lastly, how have you seen the role of the community foundation evolve given your international experience and where do you see it going in the future?*

A What struck me when I was working on the topic of non-grantmaking roles of community foundations as part of the Transatlantic Community Foundation Network, and I still see it happening now, is that traditionally in the U.S., community foundations came from a donor-service driven model while the European counterparts started with no money whatsoever and jumped into the community leadership role right away. Now more foundations in the U.S. are taking on leadership roles and steering away from safe grantmaking to strategic grantmaking. They're serving as connectors between various factions in the community, bridging them to work on acute, daunting challenges that require these connections. There are so many examples from all over the world of such work. They range from drastic cases as in Northern Ireland where peacemaking is a part of their community foundation agenda to something as down to earth as bringing a grocery store to the community. It takes someone to connect people with the resources and community foundations are perfectly positioned to be at the heart of critical developments that need to take place in the community. Community foundations, if they remain flexible, innovative, vigilant, and responsive to the community, will continue affecting lives for good forever!

KEITH BURWELL

TOLEDO COMMUNITY FOUNDATION, President & CEO
TOLEDO, OH



Q *What role does your organization currently play in the community and how do you see that evolving?*

A You're asking at a good time because we recently went through a long strategic planning process. We were fortunate to have a national strategic planning organization give us several hundred thousand dollars worth of their time because normally we could not have paid for it. According to their methodology, your plan should be a story you're telling. An example of that outside the community foundation world: they just finished with O-I who everyone thinks of as making jars or wine bottles. It's a glass container company, and they have now completely redesigned to tell a story. That glass is life and the container carries a company's mission. They did the same thing with us and part of what we came out of that with was that our community has two sides of the same coin that are really lagging. And it's not a big surprise because we were already playing there.

One side is a focus on creating better economic opportunities and we don't use the phrase "economic development," but economic opportunities. And second is looking at how to create a better educated individual and we intentionally don't say child. To use the very familiar expression "cradle to career" or "cradle to a job." So we have taken that and started to reshape the foundation. How can we convene? How can we make grants? How can we leverage? How can everything we do somehow, even when it comes to the arts, be a part of attracting and retaining and be a part of how we create economic opportunities. How can we begin that discussion about what you do for this community as a place to live or play? We came out of that dialogue on how we tell our story with the intention of not falling into the trap of trying to be an economic development agency. We want to create our own culture and we're actually borrowing some of it from the rainforest coalition guys out of California. They have seen it and said it's not about chasing buffalos, it's about how do you build that culture. Anyone with a bright idea can come and start something, create something, be something in your community. When we first say economic opportunities or economic development it scares some folks. If you're a homeless shelter, you think, "that leaves us out". No, we're creating the culture and you're a part of how we define that culture and say this is the best place to live and work and play so that's how we're changing who we are right now.

Q *And how is your staff embracing these changes?*

A They're excited. We've gone from three grant cycles to two. We've cut what we call a smaller grants profile out of the larger grant profile, so it's not just a hodge-podge of everything that comes into the stack. So our staff have really embraced it. We're all figuring out our roles, because as a foundation we continue to say we don't do programming. So we're looking at how we can design a program and help an organization move to the next level. What gap can we fill? We get great ideas and concepts but we then have to figure out how they fit into our community. Who's going to implement them and what coalition can we put together? And sometimes it's painful.

Toledo Community Foundation is the community foundation serving the Toledo region, including Northwest Ohio and Southeast Michigan with a particular emphasis on the greater Toledo area. Since 1973, TCF has worked with individuals, families and businesses, assisting them in making effective choices that match their philanthropic interests and needs while creating a better community for generations to come.

Keith has 20 years of philanthropic experience including leading and directing operations, program, development, and communications teams. He serves on several national nonprofit boards and on the Council on Foundation's Philanthropy Research Committee and Community Foundation Technology Steering Committee.



Q *Let's talk about retention. What sort of non-monetary incentives or benefits have you found effective in keeping people around?*

A We put no restrictions on learning. When I hire people, in addition to going over benefits, I also explain that they are expected to spend one week of professional development each year. It could be in town, it could be out of town, but by the end of the year you're expected to have spent one week in professional development and we pay for it. Now we jokingly say that doesn't mean you're going to Tahiti. But we think it's important to stay on the cutting edge. I say we shamelessly steal from everyone we can find without reservation. We'll apologize for it but we're going to plagiarize, steal, and borrow. We'll give you credit but we're going to use it. And then on top of that we have a program staff retreat to review the previous year and strategy. We discuss what we did right and what we did wrong. What we need to learn from last year. What we need to do this year. But then each area does that as well. It's tricky because I don't like silos but program staff need to get together and say, "Here's where we are, here's how we think bigger, here's what we could do and what we should just probably let go of."

Q *What are three to four traits that you look for when you're talking to potential employees?*

A In addition to being a good listener, we're looking for someone who is not dogmatic and can think very creatively beyond being just a problem solver. We need people who can think beyond the boundaries of where we are now, listen to different perspectives, and help us narrow them down gradually. The flipside is that we really don't look for people. We have folks who achieve high academic standards but we're not looking for academics. I'm impatient; the organization is impatient, for just paralysis by analysis. So we're not looking for someone who wants to come in and say, "Well I want to study it intensely." On the other hand they have to be able to listen and bring all sides together to achieve a goal. In this particular and unusual foundation world there is talk about ego a little bit. So we ask pointed questions about what their role is. There are too many folks who, because they have money, suddenly become experts. And that's just not true in the foundation world so we're very careful in conversations that yes we're looking for astute, we're looking for intelligent, we're looking for self-confidence. But we're also not looking for someone who can't listen, can't help design, can't think beyond where they are now. That's what it means to work as a Program Officer, to work as an Asset Development Officer, to work at a foundation. Department skills can be taught. I'm looking more at how do you deal with your personality, your culture, our culture, and the culture of what we're trying to create. Those questions are harder to ask. It's not simply telling me how you solve the problem. We have the dreamers but I need people who can also implement. The piece of the puzzle we need helps us determine which individual we're going to put in it. The skills part of it, you can get in 20 minutes if they're there or not. Everything after that is, okay let's talk about who you are.

Q *I'd like to follow up on the asset development people who have notoriously short tenures and I think on average they're getting shorter. Have you had any problems keeping people in these roles or have you seen a similar trend?*

A Right now in asset development we stay away from the word "development" because we don't want to threaten the nonprofits in town. So we call it "philanthropic services." Right now what I perceive in the development world is a lot of entry-level people who are very green as well as a lot of experienced folks with some history. And there's not much in the middle. The market has demanded a lot of experienced people and most of them want to get paid six figures, even if they don't qualify for it. So it's really tough to hire for those positions. The last asset development person I hired, we brought from California because I couldn't find anyone in Toledo.

I'm teaching a course on fundraising with the institutional development person for the University of Toledo and we don't call it philanthropy; it's fundraising. Basically the message is, "If you're really good at this, you can make six figures." and that's what everyone tells you in sales. If you're good at sales you can make six figures. But this is sales with a different language and some heart. The problem is that I can't find people I want to hire. It's even worse because if you work for a university, or you work for a nonprofit, you do an annual campaign event, and then you get the major donors. We don't do any of that. I refuse to do any events or campaigns. I keep telling our folks, "You can spend the same time talking to someone asking them for a million dollars as you can spend trying to do an event for \$10,000." So we just don't do any of that, which means I have to find folks who fit our niche at the very top in planned giving. I have a couple of key questions when we interview. If they



can't explain to me what a split interest trust is, and I'll give them several different examples during the interview, we will be polite about it, but the interview is over.

Q *So when speaking with students, I'm assuming that during or after class they ask for your advice, what sort of advice or guidance are you giving young people who are considering a nonprofit career?*

For students especially, I tell them to volunteer. I tell them to find an organization that you have a heart for and then volunteer for their development program. You might not think you have time but this is the one time in your life you have some spare time. If it's Habitat, if it's Red Cross, tell them you want to help with their annual campaign. Put your feet on the ground, start networking now and volunteer to help. Actually I've told people not to volunteer for an event. Don't be the guy who staples papers or puts the cute napkins together. Tell the organization that you want to help run a campaign. And be the person who volunteers for the campaign. Get your hands dirty so you know what you're getting into and what you're talking about. By doing so you will learn some lessons as you hear what works and what doesn't work. So it's really quite simple and for most of them it's two days or two afternoons a week. Whatever your school schedule allows, go in there and actually work. There have been a couple of students who've done such a nice job that they've been hired part-time while still in school because of the huge skills gap I mentioned earlier.

Q *What about people considering a career change? I frequently get calls, as you might expect, from people who have had a successful private sector career and are thinking about giving back. I hear that several times a week. Are you getting questions and being approached like that?*

All the time and from both ends. People who have had a successful career and now want to give back and folks that just lost their job, have a passion, and want to create a nonprofit. And the truth of the matter is, they're creating a nonprofit to give themselves a job. In both cases, we tell them to stop for a moment. We run them through the Center For Nonprofit Resources and tell them, it may seem easy but unless you're going to live on a shoestring you're going to figure out how difficult it really is to work with this organization. You're not going to be able to pay yourself for five years. On the other side of that, we ask several questions. What board positions have you held? How much have you had your hands dirty on the operational side of any nonprofit on a volunteer level? We say all the time that nonprofits need to act like businesses but the truth of the matter is they are not businesses and they never will be, because they are not pushing towards a margin or a share price, and it changes how they operate. If you don't know that going in, and I've got several examples of individuals who have done that, it just doesn't work. I'm not putting them down because we've had conversations that can be used and I have permission to use their name and it wasn't a total train wreck. They saw it, they understood it, and they've moved on. I had a good friend who became the Executive Director of a foundation. He was a college President. He did not understand until the day he left that he wasn't going to have an entourage to do everything for him like he did when he was President of a university. And I kept saying, "You don't have student interns running out your ears at the foundation. You don't have faculty or assistants. It's a different world." So that's part of it, just understanding the difference. He equated university nonprofit to community nonprofit and I said, "No, there's a big difference." I've had some folks leave government positions and go into a nonprofit thinking it was going to be easy and it's not. People don't bow down at your feet because you're an elected official. I say that kind of sarcastically but it's just different. And they're not going to immediately write you a check just because you call.

The bigger problem for most people who come out of the for-profit sector is they're used to a lot of infrastructure around them. I spend a lot of time explaining how the infrastructure in a nonprofit world is so different than the infrastructure in the for-profit world. And we can talk about how we want nonprofits to run more like businesses, and we do on some level, but you're never going to put that infrastructure over here.

ASHLEY ALLISON

WACO FOUNDATION, Executive Director
WACO, TX



Established in 1958, Waco Foundation provides a wide range of charitable services to Waco and McLennan County areas through its roles as a convener, grantmaker, listener, resource organizer, and philanthropic promoter.

Since 1994, Ashley has worked in the community foundation field, including a total of nine years of service with the \$150 million Amarillo Area Foundation, and two community foundations in the Boston area. During her career, she has raised over \$25 million in grants and contributions for various community foundation efforts.

Q *What challenges have you encountered in trying to attract and retain talent since you've been in Waco?*

A In Boston I encountered many smart, educated people, but there were very few with the skills for a community foundation. So I wasn't there long enough to say much on it other than there was someone with a master's degree from Harvard applying for almost every job that I had open. Moving to Waco, I noticed a difference in who was applying for jobs. I did have some turnover, just like you do when you come into an organization. I wouldn't say that I struggled as much, but I would say that the hiring is not traditional. I did not expect to find anybody with a background in community foundations at all coming to a market this size. But I wouldn't have necessarily thought that I would find that in Dallas or even a larger market in Texas. Not very many people have specific training, background or experience in community foundations. But I did want to find smart and talented people with a passion for the work. So rather than posting an ad in the paper, most of my recruiting has been through word of mouth and actively recruiting people who fit the mold of what I am looking for. I need people with raw talent in terms of skills and background, and being suitable for various positions. But I'm going to have to teach them community foundations and spend time with them until they are familiar and comfortable with the model, and understand the different moving parts. There's a lot of hands on training for employees new to the sector in particular, even if they've been in nonprofits. If they're new to community foundations, it just takes a while.

Q *What else do you look for? You mentioned passion and the raw skill set, but what are the top three or four things that you look for in people who are ultimately successful?*

A Well I want to go back to passion, because that's the most important thing. If anything, I probably hired about 20 different employees that have worked under me. If you don't have a passion for the work and don't believe that you're changing the community or the world beyond yourself, there is no way you can be successful no matter how smart or talented you are. There are many people who become frustrated because they are looking for monetary types of motivators and the work ends up being too hard to compensate someone who doesn't get an engaged feeling from the work that they're doing. I would say that if you have that underlying drive, and you really believe that it's changing the world, everything else will fall into place. I've worked with some extremely passionate people who believed in what they were doing and were very effective. They can be trained to do a lot because there is not a stronger motivator than someone who believes that by being better they're improving the world. I would say talent above intelligence, because you have to be so scrappy with community foundations. You need to have the confidence to figure things out but not go too far before you understand what you're doing. You have to be very thrifty with your resources but you also need to have an image of an asset manager. You have to be creative and respond quickly to what your community needs. So being talented and then smart. If you look at our employees here, I slowly began to get people who have master's degrees and have done well academically, I don't look at their grades necessarily, but it just happened that the people who are driven tend to have good grades from college. I want to change the world, and I want people to change the world. So I attract people like that and our office is full of them, that's all we have here. And something else is positive attitude; that is absolutely essential for someone working here. I tell people that this is a positive place and we don't have anyone who's got an attitude problem or comes in with a bad mood, and is rude to people. Everyone is polite, kind, and supportive even though we have different personalities here and it certainly isn't



perfect, it is a positive working environment that is very treasured by everyone. The fact is that everybody wants to be here and is generally happy. I don't tolerate anybody who is negative or brings all their baggage into work.

Q *What have you found successful in rewarding or acknowledging their work and their contribution from a non-monetary perspective? What benefits or reward recognition have you found most useful or most valued by them?*

A Because you're taking raw talent and people who don't necessarily know community foundations, I have a very generous professional development budget, and I immediately begin using it with new employees. When you live in a community like Waco, it's not like you're going to go to your daily meetings and see the cutting edge things happening around the country like you do in a major metropolitan area. So even when I was at a small organization, I'd look for scholarships; I'd look for anybody who'd share a room. I was always trying to get out and learn things. I think you have to understand what the state of the field is and where it's going, if you're going to be an effective leader in your own organization. So we give a very generous budget to everybody. They go to national conferences, state conferences, and I try to let everybody go to at least two a year and also give them all training. Everyone here has gone through community foundation fundamentals. If there are related things that they're curious about, I encourage them to go and I find ways to pay for that. I've got a lot of young people who get to see a lot of the country they haven't been to before. They meet people from all over and it gives it a more cosmopolitan feel. You feel like you're more part of the world working for a community foundation than just being isolated in a little town and I think that's a big benefit. Other than that I do give praise to people, I don't think that's necessarily anything that anyone else doesn't do but I give people the credit when they've done the work. I think there are some Executive Directors who take all the credit when there are a lot of people backing them up, and I think it's important to push out the person who did the work and acknowledge them for that. So I don't know that that necessarily means a lot to people, but I do that.

Q *Have you had any discussions with your Board about succession planning and if so are you working with your internal staff to develop that talent?*

A I have thought about that and I have two staff members who are capable of replacing me. I don't know that it's a good fit for either of them, because they are introverted people and you really have to be okay talking all the time, to all kinds of people. A community foundation Executive Director, especially in a big foundation in a small community, is always on, you have to be prepared to be on. So if you're an introverted person I think it'd make you unhappy to have to be pulled on by people outside of the foundation who invite you to parties, or a game and you have to do all this stuff. I would think that kind of thing is stressful to the introverted people who are my senior people here. I've talked to my Board about it, and I have a very good Board and have a great relationship with them. I've told them they need to do some succession planning, and they just don't want to think about it. So I've told them that this needs to be so well run and you need to be confident in it and if there is a time when you think I should leave, you tell me when to go because you've surpassed me on anything I can do for you. My goal is truly that they would become so good that they would leave me and find somebody better than me to run it. That's an aspiration for me, but that's what I've told them and they're hasn't been anyone who will do anything like that yet. We do have a policy, if something happens to me or if I suddenly had to be removed, we go through scenarios internally, with staff all the time. We have put policies in place that also allow for the foundation to not have this horrible six month process of trying to figure out where our passwords are, if something does happen to me.

Q *So thinking about the next generation and following up on that question about succession planning, what advice would you give or have you given to people contemplating a career in community foundation work?*

A I talk to people about this a lot, you have to have passion, and you have to really fall in love with the community too. It's very hard to work for a community foundation if you do not love the community. And I speak from my experience in Boston. I liked being in Boston, but I wasn't in love with the place. It just helps if you're connected, if you believe that what you're doing is actually helping. I say that to people because I think it's true of me, and my experience. It would be hard to move to a job in some place that you're not attracted to, where you didn't always want to live there. I think you have to like diversity in your work. You have to be flexible and you need to know your personality style and know that you have to have some flexibility because your job will morph over time. It will not be the same thing day in and day out. You will always have challenges. I think you



have to have a heart for something charitable, and that's different than loving the community. You see things and experience things, and you're drawn to things. There's a community out there and you put your energy toward the opportunities that are attractive to you. So if there's nothing charitable in you and you've never volunteered, if you've never wanted to help anyone, I don't know if it's a good fit, because you connect to that piece in you when you are working there. The only thing I tell all these students that work for me is if you ever want to be an Executive Director, take accounting. So many of them who are in school are advised to be social work majors, when they have something that they want to do for the world. And it makes me crazy because these kids get out here and they get a master's in social work and they don't know how to do a budget. So I tell everyone, if you're to be the Executive Director, your life becomes about money and HR and that's all you do. You get to do some other fun things on the side but you basically have to hire people and make sure that you're protected and you have to manage money, and assets, and worry about budgets and operations. If you don't like those two things, you should not be an Executive Director. You don't have to be a great business manager, but you need to know what a budget is and you need to know how to do a good budget and to use it to manage. When I'm advising a young person, I say "you need to be able to read a financial statement and if you haven't had accounting, it's very obvious if you haven't taken it and you attempt to manage a budget."

Q *Let me ask you one other thing. You've talked a bit about the passion for the work and I think as we all go through our careers, there are times when we have experiences that inspire us to keep going. Tell me about one of those really inspirational experiences that you had with an organization or an individual at some point in your career that really rekindled that fire for you.*

A When I see my employees, people I've hired and mentored, going on to something that's their dream; that always does it for me. I'm trying to think of a specific incident. I think there was one time that I was on the faculty for the community college, teaching a course on community foundations, and this guy came up to me and asked, "Do you believe in angels?" I said, "Sure I do." and he replied, "I believe I can see points of light around people, that I can see angels, and I want to let you know that when you're teaching this, there are points of light all around you." I said thank you very much and was just stunned. For someone to tell you that, even though it was odd, it was a very different experience for me. It made me happy that this was how that man saw it, and he could see my passion and enthusiasm and I was giving him that enthusiasm. When I'm teaching that class, it's 2.5 days, and it's grueling because you have to prepare so much for it. But I really enjoy doing it because I believe in the field and when my students come up to me and say that they love it, and they tell me how they understand and see how I am passionate about it, that's probably the most moved I ever am.

CONTACT US



www.waldronhr.com



insights@waldronhr.com



www.linkedin.com/company/waldron

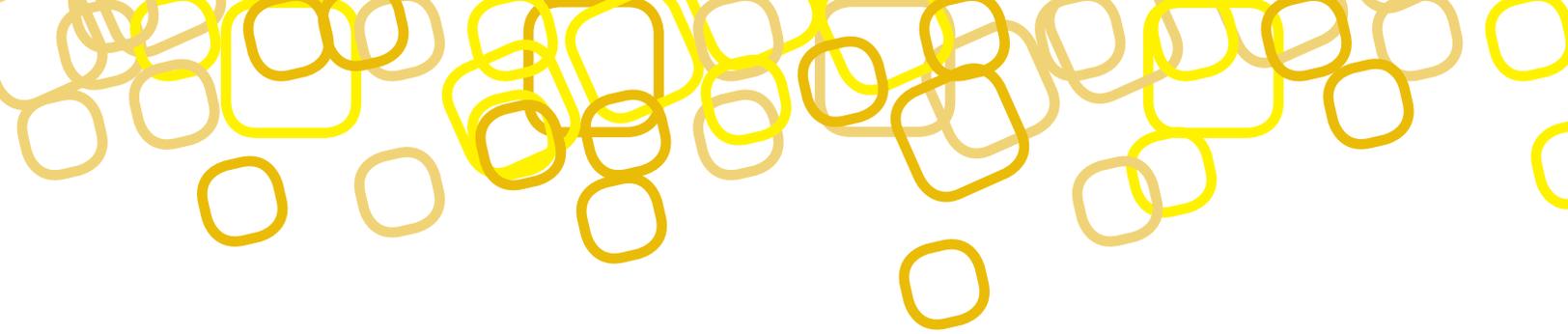


[@WaldronSocial](https://twitter.com/WaldronSocial)



www.bcorporation.net/community/waldron





waldron

