



# New Member Experience Guide

A Membership Guide to support new  
members of the Council on Foundations.



### Welcome to the Council on Foundations

We are thrilled you have decided to become a member of our community. In doing so, you join other foundations and grantmakers from across the country and around the world who are working to ensure that philanthropy is a trusted partner in advancing the greater good.

Our Membership Team created this guide to help you navigate your membership with the Council, including all the resources, professional development and networking opportunities now available to you. I encourage you to spend time reviewing this guide so you and your colleagues can make the most of your Council membership.

When I joined the Council in March of 2019, I did so with a vision for the future of philanthropy as a field that deeply values integrity, leans into collaboration and plays a critical role in strengthening civil society. The Council is committed to doing what we can to achieve this vision by representing the good work of philanthropy to the public and Capitol Hill, building community amongst our members and advancing the professionalization of the field.

I look forward to connecting with you as you begin your journey as a Council member.

Best wishes,

**Kathleen Enright**  
President & CEO  
Council on Foundations

# About the Council on Foundations

Our members are the backbone of our community and together we are committed to advancing the greater good. Building on our almost 75-year history, the Council supports over 800 member organizations in the United States and around the world to build trust in philanthropy, expand pathways to giving, engage broader perspectives and co-create solutions that will lead to a better future for all.

## OUR VISION

Philanthropy is a trusted partner in advancing the greater good.

## OUR MISSION

The Council on Foundations fosters an environment where philanthropy can thrive and cultivates a community of diverse and skilled philanthropic professionals and organizations who lead with integrity, serve as ethical stewards, and advocate for progress.

## OUR CORE BELIEFS

The Council on Foundations believes in:

### Philanthropy.

Philanthropy plays a critical role in strengthening diverse civil society and supporting communities where everyone thrives.

### Community.

By fostering a community of philanthropic leaders who generously share knowledge and resources, build trusting relationships and engage in challenging conversations across difference, we can enhance the impact of grantmakers across the U.S. and around the world.

### Integrity.

Public trust in philanthropy expands when our field demonstrates high professional and ethical standards, integrates perspectives from those most affected by our decisions and commits to continual learning.

### Awareness.

A more robust understanding of philanthropy by policy makers and the public helps create the supportive policy environment needed to expand individual and institutional giving in the United States.

### Collaboration.

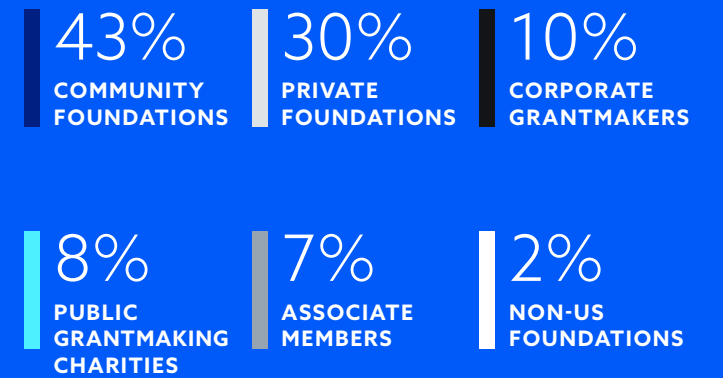
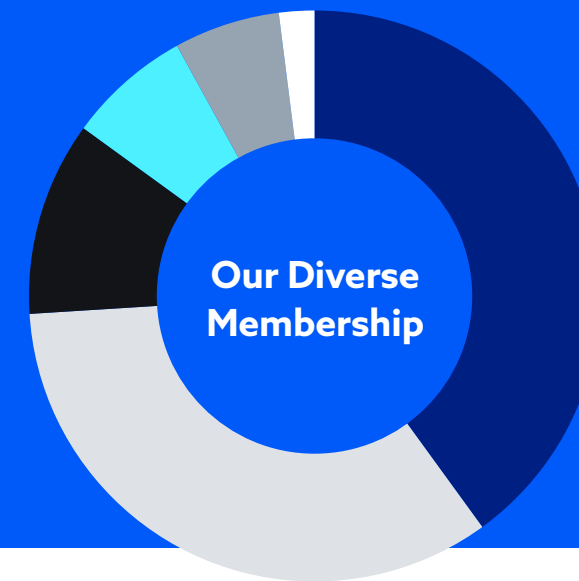
We encourage and support multi-sector collaboration and partnerships as philanthropy works to address systemic issues.

### Talent.

Philanthropic organizations are continually expanding their knowledge and understanding of how change happens. A diverse, empathetic and skilled workforce is essential to realize the full promise of philanthropy and keep pace with community needs.

# Membership at a Glance

Who are Council members? We celebrate the diversity of the Council community, which includes many types of members of different sizes from all 50 states and around the world.



## Member Benefits

Council members – including staff, board members and volunteers – have access to exclusive member benefits and services including:



### NETWORKING & CONNECTING

- Utilize our online member directory to connect with industry peers.
- Interact with industry peers online through our Philanthropy Exchange.
- Engage with fellow philanthropic peers during in-person and virtual events, including our HR Retreat, Public Policy Summit and Leading Together conference.



### LEGAL CONSULTATION

- Engage with our legal team and receive on-demand support for issues related to governance, fund management, scholarships, lobbying and political activity, self-dealing and more. Voting members only.
- Gain free access to our regularly updated Legal Compendium.



### PHILANTHROPIC EXPERTISE

- Access more than 300 member-only resources – including recently updated sample documents, tips to start grantmaking in specific countries, communications toolkits and more.
- Connect with Council staff for support on issues impacting your organization.

- Access research and reports like our Grantmaker Salary & Benefits Report and our Study of Investment of Endowments for Private and Community Foundations as well as our topical reports each year.



### PROFESSIONAL DEVELOPMENT

- Receive member-exclusive discounts to trainings, including Community Foundation Excellence courses and Legal Matters Workshops.
- Participate in professional development trainings, including Career Pathways.
- Gain free access to all live and recorded webinars.



### GOVERNMENT RELATIONS

- Contribute to philanthropy's greater impact in Washington through advocacy and regular interactions with legislators.
- Learn about policy changes, such as the private foundation excise tax, DAF regulations and how changes to the tax code impact your foundation.
- Collaborate with Council staff to strengthen your ability to work with government officials and advocate to policymakers on the issues that matter most to you.



### LEADERSHIP OPPORTUNITIES

- Submit ideas for sessions, present at conferences, participate in peer-reviews of upcoming publications, and volunteer as a faculty leader in our Community Foundation Excellence (CFE) courses.
- Opportunities to lead through our working groups and advisory groups, including our Public Policy Committee.
- Vote and serve on the Council's Board of Directors.



### SECTOR ISSUES & UPDATES

- Stay in-the-know on opportunities and challenges shaping philanthropy via our website, social media, blogs and member-only e-newsletters like:
- Council Connection - Latest news, announcements and updates from the Council and across the field;
  - Washington Snapshot- A weekly look at what's happening in Washington related to philanthropic policy and news;
  - Global Newsletter- An update on global philanthropy and grantmaking;
  - Community Foundation Newsletter- An update on community foundation philanthropy



### SAVINGS & DISCOUNTS

- Enjoy cost savings on professional development opportunities and resources, including:
- FREE access to the Legal Compendium
  - FREE access to the annual Grantmaker Salary and Benefits Survey Report
  - FREE access to all webinars + webinar archives
  - \$220 savings per Council Career Center job post
  - 20% discount on print and/or digital subscription to The Foundation Review
  - 10% discount on Council-endorsed Directors and Officers Insurance
  - 10% discount on Center for Effective Philanthropy Assessments

"I am so glad to finally have advocated enough to renew our Council membership and have access to such great resources."

**Marianna Williamson**  
Executive Director of Advancement, Broomfield Community Foundation

# Getting Started

On the following pages you will find additional guidance to help you navigate your first year as a Council member, including all the resources, professional development and networking opportunities now available to you.



## CREATE USER ACCOUNTS

Each team member of your organization can take advantage of all member benefits by creating their own, unique user account. Individuals should head to [www.cof.org](http://www.cof.org) and select 'Login.' They will then select 'Don't have an account?' to create their user account.



## REVIEW THIS NEW MEMBER EXPERIENCE GUIDE

Access new member opportunities, including webinars, trainings and networking events available to you and your team.



## LOG INTO THE PHILANTHROPY EXCHANGE

The Philanthropy Exchange is a peer-to-peer platform that connects Council members through shared interests, topics or resources. On the Exchange you can:

- Connect with your peers around the globe to discuss topics of shared interest
- Search an online library of best practices and template documents
- Seek and give candid advice in a private community of your peers
- Find members funding similar issues or performing similar roles in your foundation
- Share resources to develop stronger relationships that advance your work All Council members have access to the Exchange.

⊕ Learn more about the Philanthropy Exchange at [cof.org/exchange](http://cof.org/exchange) and get engaged in our online community. For troubleshooting or general questions, email the Membership Team at [membership@cof.org](mailto:membership@cof.org).

"I think [the Philanthropy Exchange] is great! We have gained a lot of valuable resources from other Community Foundations. It is great to have a problem/question about something and be able to search the exchange to see what others are doing to solve the problem."

**Leslie Petersen**

Office Manager, Wichita Falls Area Community Foundation (TX)



## REGISTER FOR AN EVENT OR LEARNING OPPORTUNITY

Excited to participate in a Council convening? You can register yourself and/or member(s) of your team for our sector-wide convenings, summits, retreats, and webinars. View upcoming Council convenings on our Events page.



## ASK THE COUNCIL

Our team is an extension of yours and we encourage you to contact Council's staff - who have decades of experience supporting philanthropy - for help navigating thorny issues and maximizing new opportunities.

Questions related to governance, fund management, scholarships, lobbying and political activity, self-dealing and more connect with our Legal team at [legal@cof.org](mailto:legal@cof.org). Any membership related questions, you can contact our Membership team at [membership@cof.org](mailto:membership@cof.org). If you would like to share feedback on Council benefits or strategy, you can reach out to [president@cof.org](mailto:president@cof.org).

We also realize that our members and other philanthropy serving organizations have vast knowledge and expertise in specific areas related to philanthropy, so we are more than happy to connect you with the community and leaders in philanthropy who can best help you.

# Advancing a Collective Voice

Sector-wide policy advocacy requires a sector-wide voice. The Council on Foundations advocates in the U.S. and around the world for policies that support philanthropy's role in advancing the greater good and expanding pathways to giving.

## Policy Work at the Council

As a national voice and platform, the Council works to create an environment where philanthropy can thrive by supporting federal policies that allow our sector to remain vibrant, inclusive, innovative, and effective. The actions of all levels of government fundamentally impact philanthropy's ability to serve. Our Council members help to influence our federal policy and regulatory agendas, including work on our Public Policy Advisory Committee, and input and feedback regarding our policy actions is welcomed.

From key issues like tax changes affecting foundations, donor-advised funds, global regulation of philanthropy, incentives for charitable giving, and nonprofit political activity, our policy team works on a broad range of issues that impact the philanthropic sector, whether they emanate from Congress or the executive and regulatory branch of government.

### BUILDING STRONG RELATIONSHIPS TO INFLUENCE FEDERAL POLICY & REGULATIONS

The Council educates and engages Members of Congress and their staff about the role of philanthropy in American society and the potential impacts—both negative and positive—that policy and regulation changes can have on the ability of foundations to serve communities and advance the greater good.

The Council also engages the Executive Branch to ensure that philanthropy is strategically positioned as a stakeholder of the public agenda and for collaborations with government agencies. Leveraging the investments and resources of foundations and government agencies can yield greater place-based impact across the country and around the world.

### EDUCATING PHILANTHROPIC LEADERS ON FEDERAL POLICY CHANGES

Our Government Affairs team analyzes the implications of proposed policy changes and communicates possible impacts to our members through virtual policy briefings, written analyses, and consultation with Council members (available upon request).

Members can also attend our Policy Summit, where leaders from across the country convene to learn from peers, top policy experts, and government officials on how to address the sector's most pressing policy issues.

# Connecting Through Shared Purpose

The greater good cannot be achieved by any one organization alone. The Council on Foundations fosters a collaborative environment for all members to identify and build on shared purpose through knowledge exchange and peer-to-peer support as they address society's most pressing challenges.

## Webinars and Roundtables

The Council offers a myriad of virtual professional development and training opportunities for your team to learn more about topics and issues important to the field of philanthropy. Upcoming and archived webinar recordings are a free resource for members covering topics such as complex legal issues, scholarships, global giving, self-dealing and so much more. We also have webinars specifically for community, private, corporate, and global grantmakers, including a series of executive roundtable discussions. Register for an upcoming webinar or view recordings of our archived webinars.

## Council Trainings & Convenings

### COMMUNITY FOUNDATION EXCELLENCE (CFE)

CFE courses continue to be the premier professional development opportunities for community foundation professionals. These courses help new and growing community foundation staff build the essential skills they need to balance governance and management with the broader understanding of community foundations within the philanthropic sector. All Community Foundation Excellence courses are created and led by experienced community foundation practitioners.



**Who on your team may be interested in attending:** The CFE Fundamentals course is a good fit for all roles, as it covers all components of community foundations. The course is particularly useful for new staff members, with many foundations now including the CFE Fundamentals course as a requirement for new staff onboarding.

### LEGAL MATTERS WORKSHOPS

The Council offers Legal Matters Workshops unique to the needs of our membership community. Led by the Council's legal team, the workshops are flexibly organized to ensure that broad legal questions from attendees are addressed, while ensuring a technical and practical understanding of complex rules and regulations. Sessions are curated with the help of insight gleaned from the Council's top-notch legal team that interacts with nearly 2,000 foundation leaders each year, as well as trends from the field.

Legal Matters events take place throughout the year and are typically limited to 50 attendees to ensure an intimate setting.



**Who on your team may be interested in attending:** This workshop is open to any board or staff member that is eager to dive into the legalities of our business model for effective management and leadership.

## HR RETREAT

The Council's HR Retreat is a unique opportunity to learn, share and grow with other culture, talent, and HR leaders in philanthropy. This event is for those committed to fostering a workforce and institutional culture rooted in diversity, equity and inclusion.



**Who on your team may be interested in attending:** This boutique offering is geared towards professionals who lead the human resources or culture function at a foundation with 20 or more staff.

## PUBLIC POLICY SUMMIT

Council's Public Policy Summit was created to engage foundation leaders, policy experts, and media representatives in important conversations around the most pressing policy issues of the day. This exciting and engaging event gives an opportunity to learn, shape, and be heard. Plus, attendees have the opportunity to exchange ideas and influence the positive impact that philanthropy – including the good work done by their organizations – has on communities across the country and world.



**Who on your team may be interested in attending:** This summit is great for senior leaders and policy-focused staff of foundations to attend.

## ANNUAL CONFERENCE

Each year, the Council hosts a large, in-person gathering of leaders in philanthropy and other influencers in business, government, and academia. These conferences, like Leading Locally, bring the field together to connect, learn, and share with one another.



**Who on your team may be interested in attending:** Council conferences are great for all staff, but tends to attract senior leaders, program staff, public policy staff, and those close to the Council, including Career Pathways alumni and former Board members.

+ To learn more about our Council convenings, contact our Programs Team at [educate@cof.org](mailto:educate@cof.org).

## CAREER PATHWAYS

Career Pathways is a year-long executive leadership preparation program that advances excellence, equity, and inclusion in individual, organizational, and sector-wide strategies. The program is focused on developing participant's competencies and skills in self-awareness, field-wide knowledge, and organizational leadership. Career Pathways prepares participants to successfully compete for C-suite leadership positions by expanding their capacity to become more effective philanthropic leaders.

+ Learn more about Career Pathways and how you or a member of your team can apply at [cof.org/careerpathways](https://cof.org/careerpathways).

## NATIONAL STANDARDS FOR U.S. COMMUNITY FOUNDATIONS®

The Community Foundations National Standards program is operated as a supporting organization of the Council on Foundations. It represents the highest standards of operational excellence and integrity in community philanthropy. Executed with rigor and expertise, the accreditation process was initiated by the sector and remains a peer-driven effort that ensures accountability and compliance with legal requirements.

+ Learn more about National Standards for U.S. Community Foundations® at [cfstandards.org](https://cfstandards.org).

# Publications

## Yearly Reports

### GRANTMAKER SALARY AND BENEFITS REPORT

The Council's Grantmaker Salary and Benefits Report provides salary, benefits, and diversity data for full-time staff at U.S. foundations to aid in budget planning and personnel practice benchmarking. Information is presented by grantmaker type, foundation type, asset size, and geographic location.



+ To learn more about the annual Grantmaker Salary and Benefits Report and Key Findings, please email [communications@cof.org](mailto:communications@cof.org).

"For many foundations, the bylaws require staff compensation recommended to the Board of Trustees is competitive, sensible, and has a reasonable relationship to compensation provided by other foundations of similar size. One reliable resource for the sector in meeting this requirement is the Grantmaker Salary and Benefits Survey."

**Terese Coudreaux Curriel**  
Vice President Administration, John S. and James L. Knight Foundation

### MASTERING FOUNDATION LAW: THE COUNCIL ON FOUNDATIONS COMPENDIUM OF LEGAL RESOURCES

The Council on Foundations [Compendium of Legal Resources](#) ("Compendium") is a comprehensive guide to foundation law for the non-lawyer. It is easy to use, self-directed, and regularly updated.



+ To learn more about the Compendium, please email [legal@cof.org](mailto:legal@cof.org).

### COMMONFUND STUDY OF INVESTMENTS AND ENDOWMENTS FOR PRIVATE AND COMMUNITY FOUNDATIONS (CCSF) REPORT

The CCSF Report is the field's most comprehensive and authoritative study on investment and governance practices at private and community foundations. The goal is to provide a unique information source for financial and investment staff, trustees and investment committee members of the nation's private and community foundations.

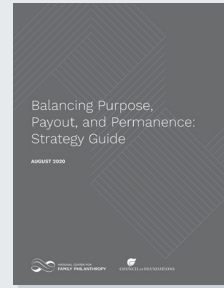


+ Learn more about the CCSF report at [cof.org/ccsf](https://cof.org/ccsf).

## Topical Reports

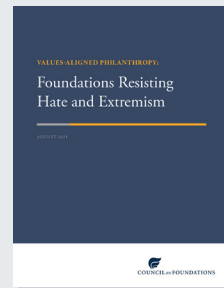
### BALANCING PURPOSE, PAYOUT, AND PERMANENCE: STRATEGY GUIDE

This Strategy Guide, developed in partnership with the National Center for Family Philanthropy, invites you to reflect more deeply on how your foundation chooses to balance the four factors of Purpose, Conditions and Trends, Time Horizon, and Assets for Mission, especially in times of greater crisis or opportunity.



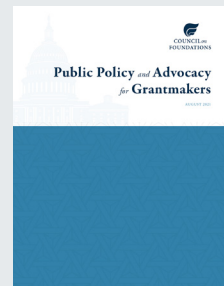
### VALUES-ALIGNED PHILANTHROPY: FOUNDATIONS RESISTING HATE AND EXTREMISM

In 2020, the Council on Foundations launched the Values-Aligned Philanthropy project to continue to respond to growing concern in the sector about the issue of funding hate and extremism. Values-Aligned Philanthropy: Foundations Resisting Hate and Extremism maps the ecosystem of what grantmakers and social sector leaders across the country are doing to prevent hate funding to provide a baseline for identifying gaps, best practices, and next steps to addressing this problem.



### PUBLIC POLICY AND ADVOCACY FOR GRANTMAKERS

Public Policy and Advocacy for Grantmakers provides a roadmap for how foundations can advance their mission and goals by participating in public policy advocacy. The publication includes stories of how foundations across the country have been successful in their policy and advocacy efforts, recommendations and resources for how to engage in public policy and advocacy, and guidance and information specific to public and community foundations.



# Realizing Greater Impact

Philanthropy is a powerful force for good. The Council on Foundations works across sectors to expand the impact of giving. In partnership with government, nonprofit, for-profit and community organizations, the Council and its members are collaborating to develop more effective approaches to systemic problems.

### GREATER GOOD CIRCLE

When you renew your membership (or anytime throughout the year), you can become a member of the Greater Good Circle (GGC) by providing additional support "on top" of your membership contribution.

The GGC represents organizations large and small whose flexible support enables us to respond to member needs and emerging issues in the field, invest in our own infrastructure, and help philanthropy be a strong and trusted partner in advancing the greater good.

### EVENT SPONSORSHIP

As a leading convener, the Council regularly brings the sector together to learn, connect, and share ideas that are advancing philanthropy. This includes the Public Policy Summit, HR Retreat, bi-annual Leading Together conference, and more.

As a conference partner, you will be able to showcase your organization's expertise, demonstrate thought leadership, and showcase a commitment to the topics and work you care deeply about. With a variety of entry points, sponsorships are accessible to organizations of all sizes and interests.

### GRANT OPPORTUNITIES

For those organizations interested in supporting the Council's work at a deeper level, we would welcome a conversation to explore how we can best work together to advance the sector.

- + For more information on supporting the Council through the Greater Good Circle, event sponsorship, or grants, please contact the Development Team at [development@cof.org](mailto:development@cof.org).

### PARTNERSHIPS

The Council often collaborates with members and other strong sector organizations through strategic partnerships that advance our common interests in service of the greater good. These partnerships can range from co-branding to co-creation. We are always interested in exploring new opportunities to engage more deeply with our members.

- + For more information, or to explore partnership opportunities with the Council, please contact Wendy Torrance, Director of Strategic Initiatives and Partnerships at [wendy.torrance@cof.org](mailto:wendy.torrance@cof.org).

## HONOR CODE & MEMBER EXPECTATIONS

The Council on Foundations regularly shares its expertise and information with other organizations and individuals working to support philanthropy and the nonprofit sector. All staff and trustees associated with a member organization have exclusive access to certain benefits including publications, surveys and other materials that may not be available to non-members.

We ask Council members to refrain from sharing member-only resources from the Council with non-members, in order to maintain membership benefits for our network.

We therefore expect that members will not share passwords or online subscriptions access, intentionally access member-only material solely on behalf of a non-member, and/or post Council resources on other websites without written agreement and permission from the Council.

⊕ Any questions regarding these expectations should be directed to [membership@cof.org](mailto:membership@cof.org).

## MEMBERSHIP POLICY SUMMARY

The Council on Foundations is a membership organization. Members elect the governing board of directors at the Council's annual meeting. Voting members of the Council are foundations, corporations or philanthropic entities that primarily provide charitable support to qualified organizations or individuals on an annual basis and that support the greater good. Voting members are encouraged to take advantage of all membership benefits including on-demand legal support, access to the Philanthropy Exchange, volunteer opportunities, and member access to in-person and online convenings and resources.

The Council also provides an Associate Membership (non-voting) for individuals and organizations that work to support the philanthropic field and/or wish to support the work of the Council. The purpose for joining the Council is to advance philanthropy through learning and connecting with others involved in philanthropic activity. Associate members do not have access to our on-demand legal team, but are encouraged to utilize legal resources including the legal compendium. Associate members also have access to the Council's Philanthropy Exchange, webinar archives, in-person and online convenings and resources.

⊕ For more information, read our membership policy at [cof.org/memberpolicy](https://cof.org/memberpolicy).

## ETHICAL PRINCIPLES FOR COUNCIL MEMBERS

In recognition of the importance of philanthropy effectively building trust and advancing the greater good, Council members aspire to meet our Ethical Principles as a condition of Council membership.

⊕ Learn more at [cof.org/ethical](https://cof.org/ethical).







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