

Community Foundation Executive Roundtable

March 28, 2019 | Community Foundation of Southern Arizona

5049 E Broadway Blvd | Tucson, AZ 85711

Located on northwest side of intersection at Broadway and Rosemont,
behind New World Plaza and near Williams Center. Click [here](#) for directions.
Self-Parking on-site | *Enter main entrance –Directions to meeting room found in Lobby*

Morning Session

- 9:00 – 9:30 *Networking Breakfast*
- 9:30 – 9:45 **Welcome**
Clint Mabie, Community Foundation for Southern Arizona
Randy Royster, Albuquerque Community Foundation and Council Board Member
- 9:45 – 10:00 **Introductions**, review agenda, attendees' one-word check-in:
Brad Ward, Council on Foundations
- 10:00 – 10:40 **What** is keeping Executives up at night? | **How** can the Council on Foundations optimally and concretely help to move the field forward?
Listening Session: Council
- 10:40 – 11:00 *Networking Break*
- 11:00 – 11:15 **Why** we convened this session: Brad
1. To discuss the collective aspirations, culture and identity of Community Foundations as a field in 21st Century
 2. To glean how the Council can optimally help Community Foundations strengthen the competitive edge of the field
- 11:15 – 11:45 **Reflections** on DC Executive Roundtable: Our collective calling as Community Foundations: Kedren Crosby | Response and Revising by the Attendees
- 11:45 – 12:00 **Resource Partners** in the Room:
1. *Dan Templin, Board Member CEONet*
 2. *Diana Anderson, Board Chair National Standards*
 3. *Chantal Forster, Executive Director, Technology Affinity Group (tagTech.org)*
 4. *Poney Carpenter, Philanthropy.io, Data/Technology Consultation*
 5. *Robin Ferriby, Council Policy Advisor*
- 12:00 – 12:45 **Networking Lunch** (w/Resource Partners)
- 12:45 – 1:00 *Break and Regroup prior Afternoon Session*

Afternoon Session

- 1:00 – 3:00 **Big Question(s) for the Field**—Eliciting Discussion and Listening Session
Brad and Council Staff
1. **Suzanne Friday, Vice President of Legal Affairs and Managing Director, National Standards**
Legal, Tax Policy, Regulations, Standards
 - a. Top Legislative Issues Impacting Community Foundations—Universal Deduction, Post-Graduate Scholarships, UBIT?
 - b. DAFs and Commercial Funds—Eroding a mission-driven, place-based approach for local generosity OR just real market pressures to manage?
 2. **Stephanie Powers, Vice President for Policy and Partnerships**
Public Policy, Federal and National Partnerships
 - a. CFs Competitive Edge in Leading Social Change—How is our work evolving in the community, expectations and core competencies shifting?
 3. **Russ Barratt, Vice President of Technology**
IT, Systems and Data Change, Software Management and National Partners
 - a. The Shifting Landscape of Technology—What is happening in the land of software management systems (like FIMS) and how do you remain competitive with managing your data?
- 3:15 – 4:00 **What we heard and captured | What we miss?** | How can the Council on Foundations optimally and concretely help to move the field forward? | Recap and next steps:
Allison Rafti, Director, Membership and Marketing and Brad
- 4:00 – 4:30 **Livestream** on today’s Executive Roundtable
Allison
- 4:00 – 5:00 **Networking Reception**
Courtyard & Lobby Area

LIVESTREAM:

<https://www.facebook.com/CouncilonFoundations/videos/583835475454856?sfns=mo>

Roundtables were made possible by the support of Knight Foundation and Council on Foundations as well as the support and contributions of our host foundations