

# Get to Know Your Community Foundation

**Brandis Hill**

**Civic Engagement Specialist, Policy & Research**

**Carrie Scholz**

**Director of Community Leadership, Community Impact**

**Kim Schultz**

**Philanthropic Adviser, Development & Philanthropic Services**



**Scan this QR Code using your cellphone's camera to access the Menti survey**

Or enter this code at [menti.com](https://www.menti.com)

4 4 1 6 6 9 5 6





Loading...



Loading...

# Guiding Questions

- **What is a community foundation?**
- **How does a community foundation work?**
- **How might my organization build relationships with a community foundation?**

# What is a community foundation?

---

**A community foundation is an independent, tax-exempt organization supported by local donors dedicated to strengthening a specific community or region.**

# Private Foundation vs. Community Foundation

	Private Foundation	Community Foundation
<b>Basic Structure &amp; Funding Source</b>	Typically funded and controlled by an individual, family, or corporation; Single funding source	Public charity that pools funds from many donors to serve a specific geographic region; Multiple donors contributing to a shared pool

# Private Foundation vs. Community Foundation

	Private Foundation	Community Foundation
<b>Basic Structure &amp; Funding Source</b>	Typically funded and controlled by an individual, family, or corporation; Single funding source	Public charity that pools funds from many donors to serve a specific geographic region; Multiple donors contributing to a shared pool
<b>Governance</b>	Donor or donor's family retains significant control over decisions	Governed by an independent board representing the community

# Private Foundation vs. Community Foundation

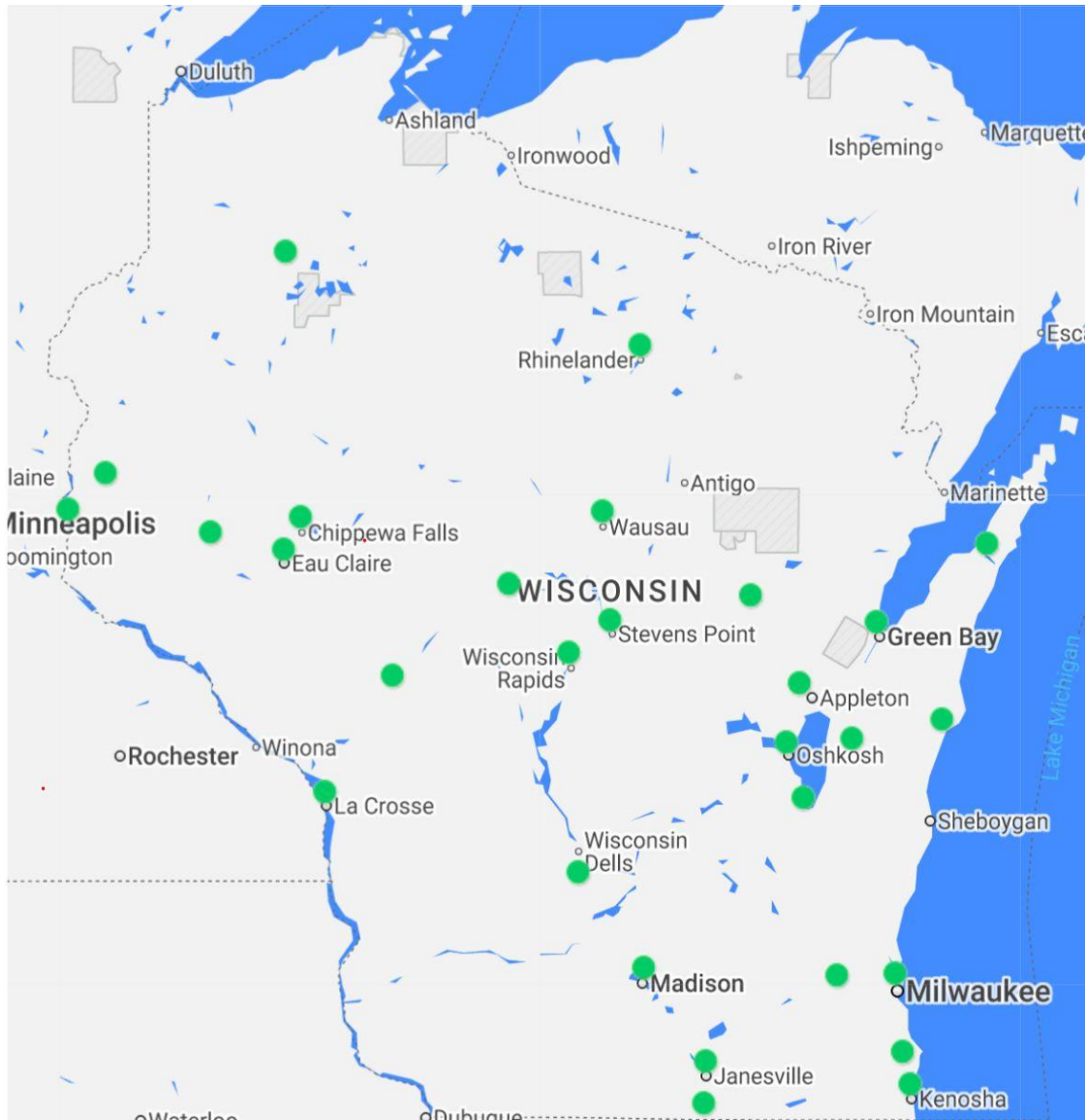
	Private Foundation	Community Foundation
<b>Basic Structure &amp; Funding Source</b>	Typically funded and controlled by an individual, family, or corporation; Single funding source	Public charity that pools funds from many donors to serve a specific geographic region ; Multiple donors contributing to a shared pool
<b>Governance</b>	Donor or donor's family retains significant control over decisions	Governed by an independent board representing the community
<b>Grantmaking Priorities</b>	Can be broad or highly specific depending on donor intent	Focused on local or regional community needs

# Private Foundation vs. Community Foundation

	Private Foundation	Community Foundation
<b>Basic Structure &amp; Funding Source</b>	Typically funded and controlled by an individual, family, or corporation; Single funding source	Public charity that pools funds from many donors to serve a specific geographic region; Multiple donors contributing to a shared pool
<b>Governance</b>	Donor or donor's family retains significant control over decisions	Governed by an independent board representing the community
<b>Grantmaking Priorities</b>	Can be broad or highly specific depending on donor intent	Focused on local or regional community needs
<b>Donor Involvement</b>	High control	Flexible—donors can advise through donor-advised funds

# Private Foundation vs. Community Foundation

	Private Foundation	Community Foundation
<b>Basic Structure &amp; Funding Source</b>	Typically funded and controlled by an individual, family, or corporation; Single funding source	Public charity that pools funds from many donors to serve a specific geographic region; Multiple donors contributing to a shared pool
<b>Governance</b>	Donor or donor's family retains significant control over decisions	Governed by an independent board representing the community
<b>Grantmaking Priorities</b>	Can be broad or highly specific depending on donor intent	Focused on local or regional community needs
<b>Donor Involvement</b>	High control	Flexible—donors can advise through donor-advised funds
<b>Examples</b>	Long-term family legacy, controlled philanthropy	Local giving, collaborative philanthropy, donor-advised funds



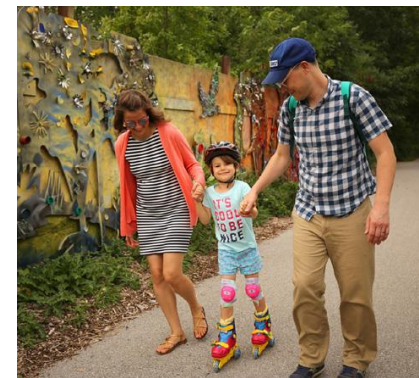
# Wisconsin Community Foundations



**Questions?**

# How does a community foundation work?

---



# Greater Together

## Greater Milwaukee Foundation





# Community Engagement & Leadership

- Center **community voice** to identify priorities
- Serve as a **convener** for the non-profit community
- Donor **education** and **stewardship**
- Policy **advocacy**
- **Civic** engagement



# Early Childhood Education Priority

- **Invest** in **high-quality** early childhood education facilities
- Increase **recruitment, retention, compensation** and professionalization among ECE workforce
- **Advocate** for **increased access** to quality, affordable ECE for people of color

Child care is expensive. The **national recommendation** is that child care should cost no more than 7% of the average family's income. In the City of Milwaukee, the median household income is \$51,888, meaning that **child care should cost no more than \$3,632 per year**. In actuality, child care costs for one infant in a group setting is **\$17,680 per year**, accounting for 34% of the average family's income.



## Fund Model

Donor-directed  
Grantmaking

Competitive  
Grantmaking

Policy & Research



# The Endowed Fund Model

## Patrick Cudahy Fund

- Established in 1915 to support Milwaukee's children & Catholic charities
- Fund Balance: \$554, 868
- Grants to date: \$589,000
- Fund still grants to organizations aligned with donor intent, as part of competitive grant pool



# How a charitable fund works

- Donor establishes fund with a gift and designates its **purpose**.
- Fund is **invested** in a pool with other donor funds.
- Every year, a portion of the fund is used to **make grants into the community**.
- **Fund value grows** long term
- Donors give during their **lifetimes**
- Donors give **beyond their lifetimes**



# Donor Funds & Grants

- **Support donors** in fulfilling their philanthropic goals
- Partner with donors to fund **greatest needs** in our community
- Share **new funding opportunities** with donors based on interest
- **Connect** donors with nonprofits
- **Steward** donors throughout their lifetime and beyond

# Grantmaking

## Donor-directed Funds

- Fund types: DAF, designated, scholarship
- Co-investment in priority areas
- Donors work with philanthropic advisers to make grant recommendations



# Grantmaking

## Agency Endowment Funds

- Available to 501(c)3 organizations
- Dollars invested for long-term growth
- Provide diversified revenue stream via annual distributions
- Tool to ensure stability and continuity of mission



# Competitive Grantmaking

- Community engagement **principles**
- Community Impact grantmaking **priority areas**
- **Responsive** grantmaking



# Grantmaking

## Board-directed Funds

- Fund types: Field of interest, unrestricted
- Managed by Community Impact team
- Non-profits apply for grants





# Policy & Research

## Early Childhood Education

- 2025-27 biennial budget included \$330 million+ in **new funding** to support Wisconsin's ECE sector
- Milwaukee Succeeds **ECE coalition**
- Working towards developing a **policy agenda** to include ECE and other priorities
- Supports **activities and initiatives** that advance the accessibility of affordable, high-quality early childhood education

# How might my organization build relationships with a community foundation?

---

# Tips for Making Connections

<b>Review</b>	Review the foundation's website
<b>Follow</b>	Follow the foundation's social media pages
<b>Subscribe</b>	Subscribe to the foundation's newsletter(s)
<b>Reach out</b>	Reach out to request introductory meetings
<b>Learn</b>	Learn what resources beyond the grant are available
<b>Invite</b>	Invite foundation staff to subscribe to your newsletter or visit your site
<b>Share</b>	Share what your sector is experiencing
<b>Develop</b>	Develop a one-pager



**Questions?**

# Thank you!

**Brandis Hill**

**Civic Engagement Specialist**

**Carrie Scholz**

**Director of Community Leadership**

**Kim Schultz**

**Philanthropic Adviser**