

Discussion Guide

This straightforward but thought-provoking tool was created for community foundation board meetings. Managing growth and sustainability at today's community foundations requires strong board leadership. This guide features a series of questions related to growth and sustainability for emerging community foundations.

Perspectives on the growth of the community foundation

How has the community foundation changed over time? What is different about our philanthropic activities today compared to when we first began?

Looking back, what were some of the most important decisions made by the foundation early in its development that led us on our current path to growth?

How should our community foundation define success beyond asset growth?

How would we articulate our approach to growth over the next five years — what are our values and what is our mindset or approach?

What critical decisions on growth and sustainability are we facing today?

These questions are designed to draw community foundation leaders into deeper inquiry, dialogue and analysis based on the full meaning and implications of *Growing Smarter*.

Active approaches to managing sustainability

How does our community foundation define sustainability?

How sustainable is our community foundation today? Where do we want to be in five years?

Is the gap between our income and expenses growing or narrowing? What type of recurring budget challenges do we face?

In the next five years, where do we want to be in terms of income and expenses?

What are the economics of the funds or products we offer, and which should we prioritize for growth based on balancing mission and sustainability?

Is our pricing structure aligned with our cost base and with incentives for donors?

What is the mix of revenues at our community foundation? What are our largest revenue sources and how stable or predictable are they?

How much of our operating costs are covered by administrative fees from donor funds? What other sources of revenue does the foundation rely on and how have these sources of revenue been cultivated?

How has our cost base changed in recent years? Where have we gained efficiencies?

What new investments should we make in the foundation's infrastructure and staff and what is the anticipated benefit or return of those investments?

How actively has the board engaged in guiding the foundation on a path to sustainability?

Does the board understand the drivers of the foundation's economics? Has the board discussed product priorities, pricing and policies? Is the board monitoring progress toward sustainability?