Board & Staff Discussion Facilitation Tool and Self-Assessment

Use the tool below, either formally (collect, tally, and present responses) or informally (as a conversation starter), to conduct an important discussion with your board and/or staff about potential opportunities to adapt your community foundation’s business model through an alliance, affiliation, or merger. This resource will help you determine your motivations for considering a new structure and clarify what you are willing or unwilling to give up. The answers should help you in structuring an option to meet your organizational needs.

1. How open are you to considering a structural change?

   1. It is not the direction we should go in
   2. It would be a great opportunity

2. What is your primary motivation for pursuing a structural change (check all that apply)?

   - Reduce administrative costs and workload
   - Address a leadership void or anticipated change
   - Shift priorities and overall strategy
   - Expand outreach and influence
   - Leverage resources and expertise from another CF
   - Spend more time on fundraising
   - Diversity investment pool
   - Change or refine identity
   - Improve outreach to donors
   - Address programmatic areas regionally
   - Amplify community leadership and program strategy
   - Spend more time on grantmaking

3. Where are you willing to give up control?

   - Administrative/Back Office work
   - Investment Management
   - Grantmaking Decisions
   - Donor Engagement
   - Fundraising
   - Governance Procedures

4. Where are you unwilling to give up control?

   - Administrative/Back Office work
   - Investment Management
   - Grantmaking Decisions
   - Donor Engagement
   - Fundraising
   - Governance Procedures

5. Is there another community foundation that overlaps with your geographic service area?

   - Yes
   - No