



10X CONVERGENCE

DAY 1: COMMUNITY FOUNDATION WORKSHOP SUMMARY

ATTENDEES

Lauren Augustine, Executive Director for the Gulf Research Program, National Academies of Science

Isabel Barrios, Director for Disaster Recovery and Resilience, Greater New Orleans Foundation

Daniel Burger, Program Director at National Academy of Sciences | Gulf Research Program

Caroline Ciocca, Nevada Community Foundation

Kellie Chavez Greene, VP-Programs, Greater New Orleans Foundation

David Gilkeson, Strategic Partnerships & Outreach Officer, Community Foundation of South Alabama

Beaux Jones, CEO, The Water Institute

Benjy Kennedy, VP, Programs, Kresge Foundation

Andy Kopplin, CEO - Greater New Orleans Foundation

Steve Maislin, CEO – Greater Houston Area Foundation

Chris Meyer, CEO - Baton Rouge Area Foundation

John O'Donnell, Director, Clean Energy Fund – Baton Rouge Area Foundation

Isaiah Oliver, CEO - Community Foundation of Northeast Florida

Barzella Papa, CEO - North Central Florida Foundation

Taylor Pineda, VP Community Engagement & Impact - Arizona Community Foundation

Katrina Rolle, CEO – North Florida Community Foundation

Maya Sanchez, Program Officer - El Paso Community Foundation

Katie Van Dusen, Program Officer, American Cities, Kresge Foundation

Facilitation + Support

Sarina Beges – Aspen Institute* Facilitator

Duke Reiter – Ten Across

Jacob Lipp – ASUF

GROUP DISCUSSION

Participants shared new foundation initiatives and operations related to resiliency

- **David Gilkeson – South Alabama Community Foundation**
 - o Resilience is a necessary conversation, but sometimes the communities that need these discussions most – i.e. rural communities – have the least capacity to plan.
 - o Leaders in the areas often take on multiple roles in the community and have limited bandwidth for work that may be critically important but is not always urgent.
- **Beaux Jones - Water Institute**
 - o Governments are positioned to address acute shocks, like disaster response, but because of the election cycle, have less capacity for addressing chronic stresses.
 - o Community foundations can leverage their long-term vision to maintain focus where government is subject to political distractions.
 - o Referenced [Resilient Jacksonville](#), City of Jacksonville resilience plan
- **Lauren Augustine - Gulf Research Program (GRP)**
 - o GRP is funded by BP settlement dollars
 - o Benefiting gulf-facing communities in TX, LA, MS, AL & FL
 - Enhance offshore energy production (cleaner? safer? more efficient?)
 - Environmental protection
 - Community Resilience (amended to add human health, which is necessary to build resilient communities)
 - Note this was not a spill remediation fund – That was another fund.
 - o GRP will “invest in those who are most invested”
 - o Fund started in 2013, and will cease to exist on 12/31/2042- 30 years
 - o Referenced resources
 - [Compounding Disasters in Gulf Coast Communities 2020-2021](#)
 - [Interactive Executive Summary](#)

Discussion of using the word **Resilience**

- o Some attendees are concerned by the word resilience
 - Generally acceptable when referring to inanimate things
 - Infrastructure can be resilient
 - But for people, it feels like it's a weight on them
- o Isaiah Oliver - Community Foundation of Northeast Florida
 - “No community of people want to be judged by their ability to take a punch.”
- o Isabel Barrios - Greater New Orleans Foundation
 - “It is critical for us to build meaning together”

Group Discussion: Evolving the Community Foundation Business Model of the Future: A Path Towards Sustainability and Impact

- Level Setting
 - o Community Foundation business model requires generalist understanding but climate related challenges require specialists
 - o Foundations need to be adept at finding ways to direct donor funds to those who need them most
 - o For example, more rural communities being most impacted by climate related perils and requiring sustainability solutions most
 - o Catalytic investing requires in-house expertise to best advise investing strategies for greater impact
- **Isaiah Oliver - Community Foundation of Northeast Florida**
 - o The traditional approach to CF has called on them to be generalists, but the focus on resiliency mandates that CFs move into a specific area of expertise
 - o Amplifying this need is the relative lack of private philanthropy/ historical foundations found in older parts of the nation where 19th century industry wealth endowed legacy American foundations.
- **Sarina Beges – Aspen Institute**
 - o Provided a rundown of the 4 main findings in [Evolving the Community Foundation Business Model of the Future](#)
 1. **Ensuring the model works / fee for service/ donor advised funds**
 2. **Resistance to donor attrition**
 - a. People leave CFs for lower fee options, but return for better service/ community connection
 - b. Impact/ catalytic investing
 - i. Interesting opportunities to engage the next gen donors
 3. **Partnerships**
 - a. Example: National Academies of Sciences (NAS) [Gulf Research Program](#) (GRP)
 - b. Government – largely on hold
 - c. Corporate – limited
 - d. Private philanthropy examples
 - i. [Kresge Foundation](#)
 - ii. [Robert Wood Johnson Foundation](#)
 1. [\\$5M impact investment](#) to support community development initiatives, including expanding access to safe and affordable housing
 2. 3 community foundations partnered: Greater Cincinnati Community Foundation, Community Foundation of Greater Chattanooga in Tennessee and Saint Paul and Minnesota Foundation
 - a. CFs making RWJF award decisions in their communities – leveraging local expertise
 - b. Frees up RWJF to maintain a focus on national strategies.

4. Donor Alignment

- a. Moving donors from transactional to transformational
- b. Evolving with donors to stay in touch amid generational transfer
 - i. What is generational transfer?
 - 1. Current – from elder Boomers (80s) to younger Boomers (60s-70s)
 - 2. Wealth emerging among GenX and younger
 - 3. Developing pipeline of engaged philanthropists among emerging/ high potential professionals
 - a. Engaging next-gen audiences on field trips and interactive learning opportunities to help provide greater understanding of community needs to help inform future giving
 - b. Teaching how to give
 - i. Isaiah Oliver – CF of Northeast Florida collaborates with United Way to help facilitate strategic giving for households that are unable to meet a \$10k threshold for a donor advised fund.
 - ii. During COVID, google.org reports, the #1 search term was “how can I help?”

- **Katrina Rolle – Community Foundation for North Florida**
 - o North Florida has created an impact investment fund, leveraging 1% of the Foundation's assets to invest in new ventures.
- **Taylor Pineda – Arizona Community Foundation**
 - o CFs have an opportunity to inspire donors by presenting organizations that are doing outstanding work.
 - o CFs have an opportunity to help donors align their giving to their values
 - o 92% of ACF donors polled called the Environment a top concern, but it represents less than 5% of the gifts they direct.
- **Isaiah Oliver – Community Foundation of Northeast Florida**
 - o “Our value proposition is not so much what we give, it’s what we know.”
 - o Leveraging social capital to help donors give in ways that align with their values.
 - o Power of convening
- **Maya Sanchez – El Paso Community Foundation**
 - o EPCF is working to connect with “expats” who have left the city but maintain strong social connections – especially around the arts, preservation and civic activation

Key Takeaways

- There is a great need for support in rural communities particularly with planning and data
- Climate change initiatives require specialists at community foundations
- Younger donors are interested in impact, see sense of place differently, highly mobile.
- Resilience is not a desirable term and needs to be reconsidered when speaking to those impacted
- Greater infrastructure investment is needed to support resilience efforts
- Trusted data is an important element in providing compelling story to donors

Next Steps

- The goal of Ten Across is to help the respective community foundations achieve goals and objectives that are made possible by collective thinking, information sharing, joint projects, and group fund-raising. Examples surfaced in the discussion, and in the Convergence meeting generally, will be identified and pursued.
- The Ten Across team will reach out to each Foundation to set up a discovery call to learn more about each foundation's current priorities and challenges to identify potential opportunities for regional collaboration and network support. This could include participation with 10X focal areas related to resilience, education, and local journalism.
- Sarina Beges of the Aspen Institute to follow up with group regarding Aspen Institute's Phase 2 research participation opportunities. Ten Across will work to support Sarina in the process and re-assemble the CF network on other occasions in 2026.