



Affiliate Playbook

*STRATEGIES TO ADVANCE AFFILIATE FOUNDATIONS
AND BETTER SERVE OUR COMMUNITIES*



COMMUNITY FOUNDATION *of the* OZARKS



COMMUNITY
FOUNDATION
of the OZARKS

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Scan the QR code for
the web version of
the Affiliate Playbook
and all the resources
referenced in the text.

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Introduction

The mission of the Community Foundation of the Ozarks is to enhance the quality of life in the communities we serve. This document reflects the core responsibilities of affiliate boards to carry out this mission and successfully execute strategies to advance the work.

Above all, members of affiliate advisory boards should work collaboratively with the CFO to set goals, identify strategies and evaluate progress. This partnership strengthens our collective efforts, supports continuous improvement and ensures meaningful results for the communities we serve.

This playbook was developed through a highly collaborative process, incorporating insights and feedback from multiple groups across our organization. It reflects the collective expertise of the CFO Regional Committee, Board of Directors and staff, ensuring that the guidance provided is both practical and aligned with our shared vision. By engaging these diverse perspectives, we aim to create a resource that truly supports affiliates and strengthens our regional impact.

The CFO staff is deeply committed to supporting affiliates and our region. In addition to the Directors of Affiliate Engagement, who will provide hands-on guidance through regular visits, meeting participation and ongoing training, the broader CFO team will also play an active role in ensuring affiliates have the resources and expertise they need to succeed. This includes offering strategic support, sharing best practices, and providing access to specialized knowledge across various areas of philanthropy and operations. To benefit fully from this partnership, affiliates are expected to uphold all core expectations outlined in this handbook.

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Strong & Committed Board



Affiliate boards play a vital role in advancing our shared mission. While affiliates operate independently, a variety of resources, best practices and guidance materials are available to support effective governance and community impact. Regular meetings, with a quorum present, are essential for conducting business, setting goals and moving strategies forward.

Each affiliate board member is responsible for active engagement: attending meetings, communicating with CFO staff, and participating in discussion, goal setting and ongoing education.

Commit to strong leadership, succession planning, strategic planning and education

Required Expectations

- Each board should elect a President, Vice President, Secretary and Treasurer as outlined in the affiliate's bylaws.
- All affiliate boards will commit to succession planning for all board members and leadership roles, adhering to term limits as outlined in the affiliate's bylaws.
- New board members should attend the "CFO 101" virtual orientation session (live or review the recording) within the first month of joining the affiliate board.
- New board members should attend all four virtual orientation sessions hosted by CFO staff (live sessions or reviewing the recorded session) within one year of joining the affiliate board.
- A current board roster (including contact information and board terms) should be shared with CFO staff annually. Any updates outside of the regularly scheduled elections should be submitted using the board member information form. [/PLAYBOOK](#)
- All affiliate boards should conduct a biennial review of bylaws and the affiliate Memorandum of Understanding with the CFO. New board members will be provided with a copy of the bylaws prior to their first meeting. If no bylaws exist, use the CFO affiliate bylaws template. [/PLAYBOOK](#)

- All affiliate boards should conduct an onboarding process for new board members within the first 90 days of their election/addition to the board that includes signing conflict of interest and confidentiality forms.

Strongly Encouraged Practices

- Board leadership appoints committee chairs to lead areas of work such as governance, development, grantmaking, outreach, etc.
- Board leaders and committee chairs work in partnership with CFO staff to identify and work toward goals/strategies.
- Prior to appointment as Board President, individuals should have served on the board for at least one year. If the affiliate has an executive committee, the incoming president is expected to have served on the executive committee for at least one year.

Optional Strategies

- Board members or affiliate staff are encouraged to serve on local coalitions, task forces or civic initiatives.
- Experienced board members should provide mentoring to new board members.

All board members are active, informed, engaged and responsive

Required Expectations

- Hold regularly scheduled board meetings at least six times per year.
- All board members should attend 80% or more of regularly scheduled board meetings.
- Develop an annual calendar to share with board members and CFO staff.
- Board leadership should attend and participate in at least one educational opportunity offered by CFO each fiscal year. This includes monthly virtual Board Education sessions, in-person training, virtual orientations or the annual

Rural Philanthropy Summit.

- Provide written expectations for board members covering attendance, responsiveness, and participation.

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Strongly Encouraged Practices

- Develop a plan for unexcused absences from board meetings. **/PLAYBOOK**

- Agendas and materials are distributed at least 24 hours prior to meetings to allow informed participation.

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- Incorporate short educational segments into board meetings (e.g., fund types, philanthropy trends and local impact).
- Conduct periodic surveys to reflect on board effectiveness, preparedness and engagement.

Optional Strategies

- Plan a board “get to know you” relationship-building event or include agenda items that allow for relationship building during board meetings.
- Annual one-on-one conversations between the board president and board members about engagement, interests and capacity.

Commit to developing a board that reflects the community it serves

Required Expectations

- Use the board recruitment matrix to build a board that reflects the diversity of the community as it relates to race/ethnicity, gender, age, geography, backgrounds, professions and other experiences. **/PLAYBOOK**
- Use term limits or staggered terms to create opportunities for new voices.

Strongly Encouraged Practices

- All board members should participate in board recruitment conversations and outreach.
- Establish goals that reflect key characteristics of the community (e.g., geography, age, professional background, lived experience).
- Review board makeup annually in relation to community demographics and needs.

Optional Strategies

- Appoint a governance committee to maintain records on past and future board members.
- Seek board nominations from community leaders, non-profit partners and trusted local networks.
- Designate seats for younger leaders or individuals new to board service.

Affiliate board members participate in and promote community leadership

Required Expectations

- Share CFO funding opportunities with nonprofits and community leaders.

Strongly Encouraged Practices

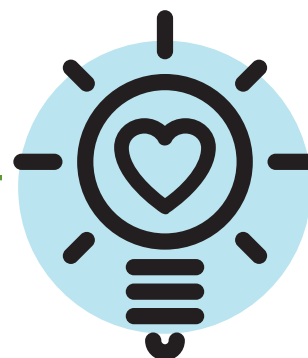
- Attend local meetings (governmental, educational or non-profit) to learn about community issues and local, state and federal funding and share findings with the board.
- Invite community members and/or new nonprofits to affiliate meetings, events or other community gatherings to introduce and connect to the community.

Optional Strategies

- Engage with other CFO affiliates addressing similar community needs or geographic areas to share ideas, successes, lessons learned and opportunities for collaboration.
- Use affiliate events and receptions to convene members of the community, educate on community needs and highlight the work of the affiliate and stakeholders.



Inspiring Philanthropy



Affiliates are charged with promoting philanthropy within their defined service area. This includes developing assets, reaching out to professional advisors, and offering education on planned giving.

Understand asset development at a community foundation

Required Expectations

- New board members should attend a board orientation session on asset development.
- Board leadership should engage with their Director of Affiliate Engagement to create development strategies appropriate for the affiliate, including promotion of planned gifts.

Strongly Encouraged Practices

- Through board leadership, development chair and/or development committee, develop a list of prospective fundholders and/or legacy donors in your community and define development strategies to engage prospects.
- Board members should lead by example, making an annual gift, establishing a fund and/or making a planned gift with the affiliate foundation.

Optional Strategies

- Engage Director of Affiliate Engagement in providing more specific training or information pertaining to strategy and/or fund types and opportunities.
- Create a matching gift program for board members establishing donor-advised funds.

Introduce, educate and engage local professional advisors (attorneys, CPAs, financial advisors, trust officers, bankers, etc.)

Required Expectations

- The affiliate board should set an annual goal for personal connections and introductions between one or more

professional advisors and the Director of Affiliate Engagement or VP of Development & Philanthropic Services. If appropriate, join the director

or vice president in conversation with an advisor about your local affiliate and services offered by the CFO.

- Plan regular one-on-one connection opportunities with local professional advisors to provide updates and information regarding your affiliate and the CFO, including upcoming professional advisor education opportunities (e.g., meeting at their office, coffee, lunch).

Strongly Encouraged Practices

- Partner with other organizations in your community that engage the professional advisor audience (local estate planning council, CPA associations, county bar association) on opportunities to share our work.

Optional Strategies

- In partnership with your Director of Affiliate Engagement or VP of Development & Philanthropic Services, consider hosting an in-person or virtual outreach or education event for professional advisors in your community that shares information about the CFO, the affiliate and philanthropic services available for clients.

Grow community grantmaking endowment fund

Required Expectations

- As a board, set an annual target for growth for your grantmaking endowment fund. This can be a percentage increase or number of new donors.
- Share information about legacy giving, particularly to the affiliate's grantmaking fund, with your network.
- Board members should conduct personal outreach to prospective or existing donors to grantmaking fund.

Strongly Encouraged Practices

- Board members should become members of the affiliate's legacy society by documenting your own planned gift with your Director of Affiliate Engagement.
- Identify community grantmaking fund donors who are prospective fund establishers or legacy donors and establish development strategies to engage those prospects.

Optional Strategies

- Through board leadership, development chair and/or development committee, review list of donors to the affiliate's endowment to identify and encourage certain donors to "step up" their giving by a specific dollar amount or percentage.

Effective and strategic stewardship of key stakeholders

Required Expectations

- Invite community grantmaking endowment donors to affiliate community events.

Strongly Encouraged Practices

- Send handwritten thank you notes to all donors to your affiliate's grantmaking endowment throughout the year.

Optional Strategies

- In partnership with Director of Affiliate Engagement, identify prospective and existing fundholders or legacy donors to invite to local affiliate community events.



Effective Grantmaking

Boards should make annual grant recommendations from their community grantmaking fund and any other funds they advise.

Understand what it means to be an effective, impactful grantmaker

Required Expectations

- Board members (new and returning) should attend a board orientation session on effective grantmaking and follow the affiliate grantmaking expectations. [/PLAYBOOK](#)
- Grantmaking committee or board participates in grant application review, evaluation and decision-making.
- Ensure board members disclose conflicts and recuse themselves when appropriate during grant decisions.

Strongly Encouraged Practices

- Accept applications for the affiliate's annual grant round using the CFO's online grantmaking portal. (Note: All grant rounds will be online beginning in FY28)
- Appoint a grants chair to work in partnership with the CFO's Community Impact Coordinator and lead the affiliate's grantmaking efforts.
- Regularly review processes to reduce barriers for applicants and expand access to funding.
- In collaboration with the CFO's Community Impact team, review final reports from grantees.

Optional Strategies

- Conduct site visits to past grantee organizations and hold grantee conversations with board members to understand real-world impact.
- Partner with other funders or affiliates to address shared priorities.

Get to know and engage with local, regional and statewide nonprofit organizations serving your community



Required Expectations

- In partnership with the Director of Affiliate Engagement and the CFO's Community Impact team, define goals and approaches for engaging with grantees, new applicants and other local nonprofit organizations.
- Review applications from nonprofits and follow-up reports from grantees to understand work.

Strongly Encouraged Practices

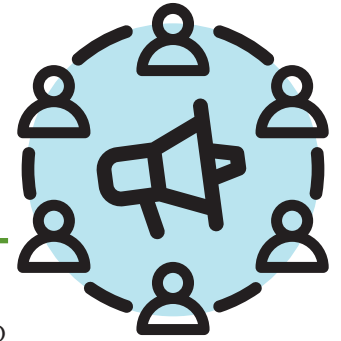
- Host at least one local or regional nonprofit-focused convening annually.
- Encourage board members to attend at least one nonprofit meeting or event annually to serve as ambassadors for the foundation.

Optional Strategies

- Coordinate visits to local nonprofits to learn more about their mission and impact.
- Learn more about what statewide nonprofits are doing in your community and understand why they need local support.
- Share funding priorities, timelines and community insights openly with nonprofits.
- Involve community members in aspects of planning, priority setting or grantmaking.



Engaged Communications & Marketing



To maintain clarity, consistency and quality in communications, affiliates are expected to work in concert with the CFO communications department to ensure all materials (printed or digital resources, media communications, promotional items, etc.) meet organizational standards of quality and branding.

Understand and develop expertise in promoting philanthropy for your affiliate

Required Expectations

- Attend CFO or CFO-recommended training sessions on communications.
- Understand the CFO's communications and marketing offerings and standards for affiliates, including the Affiliate Communications Toolkit. [/PLAYBOOK](#)

Strongly Encouraged Practices

- Identify or recruit a board member with an interest in communications and marketing.

Optional Strategies

- Appoint a board member to lead promotional efforts for your affiliate in partnership with CFO staff.

Develop your affiliate story

Required Expectations

- Draft board and personal talking points about your affiliate, using tips provided by the CFO Communications team.

Strongly Encouraged Practices

- Work with your director of affiliate engagement or affiliate coordinator to request review by the CFO Communications team of story ideas, news releases, or other promotional efforts at least once a year.

- Share stories about your affiliate published by the CFO with your community.

Optional Strategies

Review the CFO's tipsheet on developing story ideas to show the affiliate's impact on the community and highlight the work or local nonprofits. [/PLAYBOOK](#)

Share your affiliate story

Required Expectations

- Maintain a basic, up-to-date description of the affiliate's mission, purpose, and role in the community on the CFO website. Websites should be checked for accuracy annually.
- Regularly share stories that highlight grants, donors, nonprofits or community outcomes in person with your personal networks or through personal platforms including social media.
- Develop and share press releases covering affiliate activity using the release template (e.g., changes in leadership, grant rounds, etc.) [/PLAYBOOK](#)

Strongly Encouraged Practices

- In partnership with the CFO's Communications team, create a communications plan to advance affiliate strategies by seeking promotional opportunities, including events, networking and other media or publicity opportunities, using CFO affiliate materials.
- Incorporate stories into grant celebrations, donor events or community gatherings.

Optional Strategies

- Maintain a collection of ready-to-use stories, quotes and visuals to share when needed.

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Engage with the community

Required Expectations

- Share information about your affiliate grant cycle. Send an email announcing grant cycle opening to your network and share on social media.
- When hosting community events, use CFO-provided logos, images and other materials to ensure brand consistency. This includes invitations and programs developed or approved by the CFO Communications and Marketing team.
- Maintain a visible and accessible presence in the community through meetings, events or communications.
- Respond to community inquiries, requests or concerns in a timely and respectful manner.
- Use social media to connect with the community using CFO recommendations and complying with CFO's social media guidelines. [/PLAYBOOK](#)

Strongly Encouraged Practices

- Create opportunities to hear from community members, nonprofits or fundholders about needs and priorities.
- Build relationships with local government, schools, businesses and civic organizations.

Optional Strategies

- Design engagement strategies for specific populations or communities.



Affiliate Playbook Timeline

September–December 2026

- Affiliate Playbook rollout and Town Halls

By January 2027

- Sign commitment letters and (as applicable) guidelines, MOUs

By March 2027

- Complete leadership training and mentorship sessions
- Submit annual calendar, schedule leadership orientation/training

By August 2027

- Demonstrate improvement in, or continue meeting, at least two of the following key metrics:
 - ▶ **Governance:** Meeting cadence stabilized; at least 80% attendance trend established; roster submitted; term limits documented.
 - ▶ **Development:** Draft development strategy with Director of Affiliate Engagement; conduct annual professional advisor outreach; set grantmaking fund growth target and begin initial outreach; evidence of active donor cultivation and at least one new fund.
 - ▶ **Grantmaking:** Schedule at least one grant round or have in process (ideally online) OR recommend at least one grant for a special, emergent or long-term community project; complete annual conflict-of-interest forms and install a grants chair.
 - ▶ **Communications:** Complete training; announce grant cycle; publish one impact story; align materials to CFO branding/toolkit.

By August 2028

- Sustainable growth trajectory
- Consistent grantmaking
- Strong communication and community visibility
- Measurable improvement in at least two pillars

March 2029 and beyond

- Governance and operations running to Playbook norms:
 - ▶ Regular grantmaking with nonprofit engagement
 - ▶ Steady fund growth
 - ▶ Consistent communications cadence



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