

## COMMUNITY FOUNDATION OF NORTH TEXAS:

# 2009 Year in Review

### Governance and Administration

- Reviewed legal fund agreements for adherence to donor intent and compliance with recent legislation (PPA); reformed when needed
- Moved office to a smaller and more visible office in Fort Worth Club
- Held Board retreat to build consensus and derive action plan
- Placed fund summaries into FIMS database
- Initiated insurance review for adequacy of coverage and cost savings
- Added voice mail and intranet server; implemented document calendar sharing

### Donor services

- Launched Donor Central (online access to funds for donor advisors)
- Held Investment Forum for donor advisors
- Re-vamped fund statements

### Marketing/visibility

*(Expanding and diversifying our donor & supporter base)*

- Added 8,500 names to database with affiliation codes
- Refreshed logo with new colors and fonts
- Redesigned website and submitted RFP for complete website overhaul to four development firms
- Foundation's first newsletter mailed to 8,500 households
- Gave three major talks to large civic groups and to nonprofit associations
- Had 29 meetings with nonprofit leaders

### Professional advisor outreach

- Gave six presentations to law and accounting firms
- Led two presentations for Texas Bar sections
- Had 36 one-on-one meetings with professional advisors
- Sent first e-newsletter to professional advisors in November
- Produced specialized marketing materials geared to professional advisor clients
- Professional Advisor Cabinet formed, with 25 members and 23 attending inaugural luncheon