

Community Foundation of Central Missouri Strategic Plan 2016

Mission

The Community Foundation of Central Missouri inspires and nurtures philanthropy for the public good.

Vision

The Foundation leads the way by employing the sustainable power of philanthropy in support of nonprofit missions in our service area.

Core values for the Foundation's work

- Encourage generosity and a philanthropic spirit
- Be ethical, trustworthy, and guided by personal integrity
- Be transparent and responsible stewards of the public trust
- Be collaborative, inclusive, community-focused, and people-centered
- Emphasize quality and excellence in all we do
- Adhere to sound and generally accepted standards of fiscal accountability
- Adopt goals that reflect the needs of communities we serve
- Establish long-lasting relationships that will strengthen our ability to help others

Theme

working together. improving lives.

Service Area

We work with communities in various counties in central Missouri that engage our services.

Strategic Goals

1. We will become a vital community foundation by building our asset base toward sustainability.
2. We will create efficiencies in the people, systems, and programs that are needed to accomplish our mission and vision.

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Strategic Goal #1: We will become a vital community foundation by building our asset base toward sustainability.

- **Objective 1: Target Untapped Individuals and Non Profits in Columbia**
Potential Owner: Development Committee
 - Identify key non-profit clients who would benefit from establishing an endowment, capacity-building or other investment fund with CFCM
 - Identify community members most likely to benefit from establishing a donor advised, or other, fund
 - Explore partnership opportunities with unique players/channels in the community
 - Assign board member to provide introductory meeting to each identified target on the list

- **Objective 2: Identify and Cultivate Allied Professional Partnerships**
Potential Owner: Marketing Committee
 - Identify and prioritize collaborative relationships with allied professionals in our service area (brokerage houses, insurance professionals, financial planners, estate planning attorneys, accountants, etc.) and educate them on opportunities where CFCM might benefit their clients
 - Assign Board member who can provide introductory meeting to key players from these professional groups
 - Cultivate these relationships with fall (Annual Report Meeting) and spring (Speaker or CE training) events

- **Objective 3: Utilize Board Members to Drive Growth Opportunities**
Potential Owner: Governance Committee
 - Establish fundraising expectations for each board member to be part of the Foundation, such as setting up a Donor Advised Fund or making an annual donation
 - Establish prospecting expectations for each board member as it relates to submitting potential leads to the fundraising committee and/or taking point on making introductory contacts to existing target audiences
 - Reach out to past board members regarding opportunities to stay engaged, make

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connections, and drive further growth

- **Objective 4: Target Untapped Communities in our Coverage Area**

Potential Owner: Not yet identified; lower priority for 2017

- Evaluate counties in MO considered in our coverage area for current philanthropic giving and “CFCM readiness” as well as existing community foundation efforts
- Prioritize top 2-3 high readiness counties to target for introductory and cultivation meetings
- Cultivate a county/city point person in these areas who promote the idea of a community fund to fill in “need gaps”

Strategic Goal #2: We will create efficiencies in the people, systems, and programs that are needed to accomplish our mission and vision

- **Objective 1: Add or realign human resources to better achieve strategic goals**

Potential Owner: TBD

- Hire or contract with part/full time staff to reduce ED’s administrative workload (e.g., administering CoMoGives, writing web content, writing press releases, etc.)
- Identify ways to increase time ED spends meeting with prospects

- **Objective 2: Develop staff and board of directors to better achieve strategic goals**

Potential Owner: TBD

- Develop a board member profile that identifies the interpersonal qualities as well as talents and networking capabilities needed to be a successful and active board member
- Strategically recruit board members with competencies, connections, and commitment necessary to effectively serve entire CFCM service area
- Conduct board fundraising training to enable board members to effectively fundraise on CFCM’s behalf
- Conduct board messaging/marketing training to enable board members to effectively serve as CFCM spokespeople

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- **Objective 3: Improve organizational systems and processes to better achieve strategic goals**
Potential Owner: Not yet identified; lower priority for 2017
 - Update and implement marketing plan to educate public and targeted audiences about philanthropy, CFCM's mission and vision, strategic goals, programs and community benefit
 - Identify process improvements to reduce administrative workload (e.g., uploading data for CoMoGives, managing contacts, linking articles to social media, etc.)
 - Fully implement Contact Relationship Management system to manage communications with key stakeholders (including current and potential fund owners, financial advisors, etc.) and mine for new fund opportunities
 - Create associated work plans to support plan implementation
 - Conduct at least annual board/staff reviews of strategic plan to maximize outcomes

Ad Hoc Strategic Planning Committee Members:

Eric Staley, Dean Runyan, Carolyn Sullivan, Rebecca Jones, David Russell, John Blakemore, Chris Janku, Wilson Beckett

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