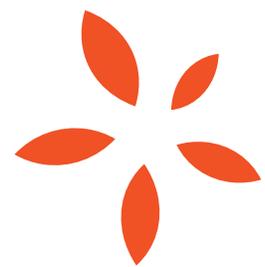




# INSPIRING PHILANTHROPY VIBRANT COMMUNITY

STRATEGIC PLAN 2014-2016 | Executive Summary



**COMMUNITY  
FOUNDATION**  
SOUTHWEST  
WASHINGTON



# EMBRACING CHANGE

Our community is fluid. The ebbs and flows of local, regional and national issues constantly influence us. But we also carve a path for our region every time citizens and organizations choose to take action. The Community Foundation for Southwest Washington was born from such local action 30 years ago.

At the time, state and federal assistance were receding amid a sluggish economy, and southwest Washington communities were left to deal with the results. These circumstances prompted a group of local leaders, led by Mary Granger, to find a solution to our region's increasing social needs. Their plan: encourage charitable investments made by the community, for the community.

What built the Community Foundation then remains at its core today. Our staff works tirelessly to advance local philanthropy and better address our region's needs. However, as the Foundation approached its 30th year, shifts in the nonprofit sector and our community led our Board of Directors and staff to embark on a strategic planning process.

We also invited many of you to join us in assessing the Foundation's role in the community. Board members, current donors, community leaders, professional advisors and community foundation peers provided feedback through personal interviews. Your input, along with a review of our business model and data from other community foundations, produced a case for change that we then formalized into a three-year plan.

Adopted at the start of 2014, this plan outlines the steps that we believe will allow the Community Foundation to continue using its available resources to achieve the greatest impact possible. The following pages invite you to learn about our broader plan and think about how you or your organization might fit into our work, because your endorsement and participation are crucial to our success.

History has shown that local action is our only guarantee for local change. So, please join us as we work to carve a path toward a more vibrant and engaged southwest Washington. With persistent optimism and a commitment to improvement, we will prevail as a community.



Jennifer Rhoads, President



# DEFINING OUR IDEOLOGY

## OUR MISSION

**WE INSPIRE A CULTURE OF GIVING TO CREATE A VIBRANT AND ENGAGED COMMUNITY.**

In fulfilling our mission, these enduring ideals will serve as a compass as our staff and Board maneuver the challenges inherent in philanthropy and social change.

## OUR VALUES

### INTEGRITY

We are thoughtful, honest and accountable in all aspects of our work.

### LEADERSHIP

We have the vision and courage to shape a better future for our community.

### COLLABORATION

We listen to our community, leverage resources and forge partnerships.

### IMPACT

We are strategic and effective in achieving results.

### EXPERTISE

We possess a deep understanding of community needs and philanthropic strategies.

# THE HEART OF OUR STRATEGY

The strategic intent of the Community Foundation for Southwest Washington is to improve our region's quality of life by supporting local donors and increasing the capacity of our nonprofit sector. To accomplish this, we plan to improve on what we do today and incorporate new elements into our work that will foster community, a culture of giving and lasting change. Over the next three years, we will focus our efforts on the following overarching objectives:

1

## Promote philanthropy by helping donors meet their charitable goals and meet the community's greatest needs.

No other organization has such intimate knowledge of local nonprofits and needs. By refocusing staff time and establishing new tools, the Foundation will improve how it captures and communicates information on community issues and the charitable organizations leading local projects and programs. Our staff will continue to make this information actionable by providing the charitable expertise and range of giving options that donors and professional advisors have come to expect from us. Through this approach, the Foundation will foster a culture of giving and increase charitable investments in our community.

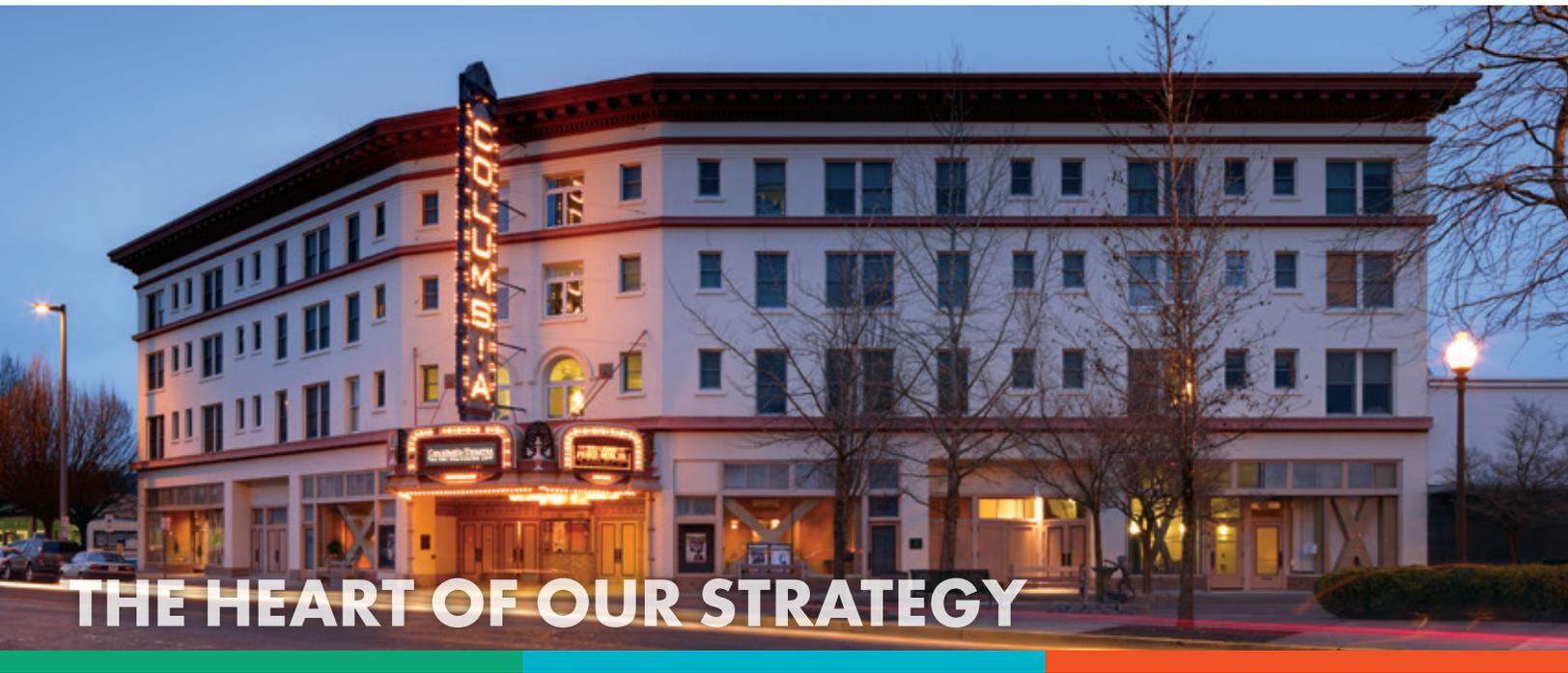
### STRATEGIC BEHAVIORS

**INFORM** Educate the donor community about current demographic and social trends and expose them to the needs of southwest Washington.

**INSPIRE** Excite current donors and attract new, highly engaged philanthropists by increasing awareness and understanding of the value of the Community Foundation.

### WHAT WILL CHANGE?

- » Implement a more robust donor engagement plan
- » Assess fundholder values and interests in a more deliberate way
- » Identify grant opportunities that mutually support donor and community goals
- » Increase opportunities to learn about the community and nonprofits
- » Reach new groups to expand and diversify the donor base for all area nonprofits
- » Promote philanthropic services, fund stewardship and local granting more effectively
- » Provide more data and analysis on needs, trends and grant opportunities
- » Make philanthropy more accessible through new initiatives and events



## 2

Engage and collaborate with community partners to identify creative solutions to current challenges and deepen our knowledge of the region.

Community Foundations pursue broad, place-based missions and are designed to attract and grow substantial grant dollars. Locally, your Community Foundation is seen as an objective source for philanthropy with a reputation for assembling expertise around pressing issues. These traits make the Community Foundation an ideal facilitator to appraise community values and to lead the philanthropic charge in addressing the region's shared priorities. By maintaining strong relationships, conducting research and increasing our grantmaking, our Board and staff aim to make a more substantial impact on vital community issues.

### STRATEGIC BEHAVIORS

**LEARN** Expand and enhance our understanding of southwest Washington's demographics, community trends and charitable organizations serving those in need.

**ENGAGE** Provide opportunities for active dialogue with the community around important issues impacting southwest Washington. We will listen and learn before we fund solutions.

**IMPACT** Continue to promote a strategic grantmaking program in southwest Washington. Discretionary grants will be larger in size and aligned with the Foundation's strategic plan and community priorities.

### WHAT WILL CHANGE?

- » Increase presence and visibility throughout our entire service area
- » Serve the community by acting more as a convener and leader
- » Participate in current collaborative efforts in the community
- » Implement new initiatives and events to engage all residents in philanthropy
- » Adopt more proactive and multi-year granting policies
- » Expand efforts to gather and share grantee and community data
- » Gather stakeholders around community issues more often
- » Grow partnerships and provide more collective funding opportunities
- » Align operations and grant dollars with community values



## THE HEART OF OUR STRATEGY

3

**Build an energized and financially sustainable business model that aligns with our mission and meets our short- and long-term goals.**

An essential part of creating lasting change is ensuring that the Community Foundation lives on. Long-term viability for the organization is, therefore, a key objective. Fundholders serve as key economic drivers for the Foundation, so it is imperative that outright and deferred gifts to the Foundation increase over the next three years and beyond. Equally important are the revenues we generate through a healthy investment program and contributions to our Administrative Endowment fund. Together, these inputs will increase our capacity to expand the Foundation's strategic objectives and, in turn, lead to an increase in philanthropic activity.

### STRATEGIC BEHAVIORS

**STRENGTHEN** Evaluate existing business practices and restructure the organization for financial sustainability. Increase total financial resources with an emphasis on permanent assets.

**ENERGIZE** Practice organizational excellence while fostering an energizing, collaborative, rewarding and fun culture in order to strengthen our capacity to serve donors, nonprofits and the community.

**LEAD** Create an externally focused organization where team members engage in leadership opportunities throughout the community.

### WHAT WILL CHANGE?

- » Emphasize sustainability through all operations
- » Design staff roles and tasks that align with strategic objectives
- » Strive to achieve the highest financial returns, within acceptable risk parameters
- » Provide more opportunities for leadership and leadership training to staff members
- » Increase awareness and fundraising around the Administrative Endowment
- » Strengthen partnerships with organizations advancing the nonprofit sector
- » Encourage increased civic involvement and leadership among staff
- » Engage our Board of Directors more effectively through learning opportunities
- » Emphasize healthy and productive professional relationships

# ENVISIONING OUR FUTURE

For 30 years, southwest Washington residents have trusted the Community Foundation as an exceptional charitable steward.

This strategic plan honors that reputation by renewing the Foundation's historical promise to address the greatest needs in our community. It also reinforces our commitment to donors, charitable organizations and community leaders as generators of local innovation and positive change.

What this plan introduces is a retooled approach to serving our community, which emphasizes convening and leadership. This approach stems from our belief that citizens are the best surveyors to map our community's priorities and that the Community Foundation is the best vehicle to drive local change. Our journey together starts by talking through critical regional issues and identifying the common good that unites us all.

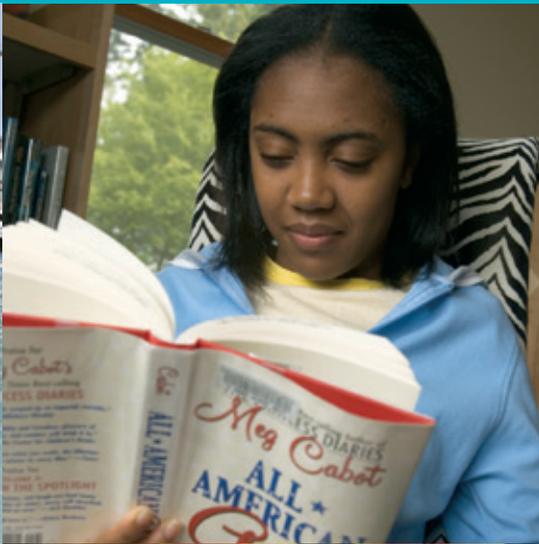
However, the horizon shows signs of accelerating change and increasing complexity. Our strategic landscape is more uncertain than ever, which is why our Board and staff understand the need to refine our strategy as the twenty-first century continues to evolve. Because of this, our strategic plan will serve as a flexible and dynamic document, sharply focused on the next three years.

Whether you are a fundholder, grantee, partner or community member, we welcome your input during this time. We understand that adopting this plan will bring intended and unintended changes to your lives as well, so your feedback is necessary for us to implement and adapt our plan accordingly.

Success is within reach, if we reach for it together. So, join us as we strive to improve our community's foundation — the Community Foundation for Southwest Washington.

## ENVISIONING OUR FUTURE





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