



Leading **FOR GOOD**

2022-2027 STRATEGIC PLAN

Adopted by the Board of Directors on June 22, 2022



Plan Purpose

The Community Foundation was founded more than 50 years ago to support the ever-changing needs of our communities through philanthropy. As our region grows and evolves, we redouble our commitment to fulfilling that vision.

Our **2022-2027 Leading for Good Strategic Plan** outlines how we will expand our impact and serve every corner of Palm Beach and Martin counties through powerful philanthropy. While the plan prioritizes our work over the next five years, it also lays the foundation for the following five decades, building our legacy as our area's premier philanthropic partner.

This summary maps out the Community Foundation's refreshed organizational priorities that will help us, in partnership with our donors and community nonprofits, create solutions for our area's unmet needs and lead for good.

METHODOLOGY

MISSION, VISION & VALUES

STRATEGIC PRIORITIES

KEY MILESTONES

Steering Committee



JULIE
Fisher Cummings



SHERRY
S. Barrat



SUSAN
P. Brockway



The Honorable
SHEREE
Davis Cunningham



WILLIAM
E. Donnell



EARNIE
Ellison, Jr.



CHRISTINA
M. Macfarland



JEFFREY
A. Stoops





Methodology

OVER A NINE-MONTH PERIOD, OUR BOARD OF DIRECTORS LED A COMPREHENSIVE PLANNING PROCESS TO ANALYZE OUR STRENGTHS AND OUR OPPORTUNITIES, AND TO CREATE A PLAN OF ACTION FOR HOW THE COMMUNITY FOUNDATION CAN BEST MEET THE NEEDS OF OUR COMMUNITY.

- 01.** We formed a Board-led **Strategic Planning Steering Committee** to oversee the process.
- 02.** We found common ground around our **values** under the skillful direction of Robert Snyder, Executive Director of Strategy and Corporate Communications at NCCI.
- 03.** We partnered with Boldly Go Philanthropy, a leading strategic planning consultant, to **enhance our vision** for the community and our **organizational mission**, facilitate the **planning process**, and bring best practices to bear, including:
 - **Interviewing 60+** philanthropists, volunteers, peer funders, public and civic leaders, grantees, partners, leadership, and staff to infuse both internal and external perspectives in this work.
 - **Analyzing our stakeholders' feedback** to help draft an initial strategic framework.
 - **Testing, vetting and iterating** this framework to strengthen the final Strategic Plan to make it clear, effective, and focused on the end goal: making life better for all who call our area home.

SUMMARY OF STAKEHOLDER FEEDBACK

CURRENT COMMUNITY FOUNDATION STRENGTHS

- Trusted, long-term leadership in the community.
- Strong relationships and convening power with local nonprofits.
- Flexibility and autonomy provided for grantees.
- Outstanding investments in our area's youth and in times of crisis.
- Broad regional knowledge and expertise.

OPPORTUNITIES TO INCREASE IMPACT

- Raise awareness of the Foundation's work and valuable philanthropic partnerships.
- Lead and convene partners and philanthropists on the most critical issues.
- Leverage and share knowledge and data on pressing needs.
- Deepen relationship with underserved groups and neighborhoods.



Our Mission and Vision

WE REFRESHED OUR CORE ASPIRATIONS TO BETTER RESPOND TO THE NEEDS OF OUR GROWING COMMUNITY.

OUR MISSION

We strengthen our communities by amplifying philanthropy and catalyzing solutions, through our direct work and in partnership with donors, nonprofits, and the community.

OUR VISION FOR THE COMMUNITY

Palm Beach and Martin Counties are thriving communities where all people can access opportunities and achieve their greatest potential.

OUR VISION FOR THE FOUNDATION

We are the foremost resource for donors and nonprofits on our most pressing issues and a leader in making our community a better place to live.



Our Values

IMPACT

We seek to significantly improve people's lives by making a difference in every corner of the counties we serve.

COLLABORATION

We convene and partner to advance shared goals so that we can accomplish more together.

EQUITY

We value, respect, are inclusive of, and strive to improve outcomes for all people in our community.

INTEGRITY

We act ethically, honor our commitments, and apply rigorous oversight to ensure we are trustworthy.

EXCEPTIONAL SERVICE

We customize our support to meet and exceed the needs of our donors and partners.

OUR LONG-TERM,
**ASPIRATIONAL
“NORTH STAR”
GOALS**

CENTER ON THREE AREAS
THAT WILL HELP US PROPEL
COMMUNITIES IN EVERY
CORNER OF OUR COUNTIES:

1. Serving as a leader and changemaker for our **community**
2. Growing philanthropic resources and providing exceptional service to our **donors**
3. Ensuring our longevity as a best-in-class **organization**



Our Strategic Priorities

THE SPECIFIC INITIATIVES THAT WE ARE UNDERTAKING OVER THE NEXT FIVE YEARS TO ADDRESS OUR COMMUNITY'S UNMET NEEDS:

01. BUILDING AND SHARING COMMUNITY EXPERTISE

We are building a community data center and story bank that allows the Community Foundation to better share knowledge on pressing issues — and solutions.

02. SUSTAINING OUR NONPROFIT ECOSYSTEM

We are creating a searchable database to better connect donors and volunteers directly with nonprofits on the frontlines, and we are building the capacity of our nonprofit partners through trainings and services that will improve their financial stability.

03. ADDRESSING CRITICAL ISSUES

We are focusing our grantmaking around four areas of critical need:

Education and Youth: programs that will lead young people to their fullest potential, including scholarships.

Economic Opportunity: programs that focus on job training and workforce development that lead to greater economic success and an improved quality of life.

Thriving Community: programs that address a broad range of issues aligned with current community needs (e.g., arts and culture, environment, housing, mental health, community revitalization, etc.).

Crisis Preparation and Response: as acute challenges arise (e.g., hurricanes, pandemics, etc.), programs that meet immediate and urgent needs for our area's residents.



Our Strategic Priorities continued...

04. INCREASING OUR DONORS' IMPACT THROUGH ASSET GROWTH

In partnership with our Board, we are cultivating relationships with new and current donors to grow their investments and accelerate ways to make a short- and long-term difference on the issues closest to their hearts.

05. EXCEEDING DONOR EXPECTATIONS

Through donor engagement and education initiatives, we are understanding the issues our donors care about most and reinforcing their decision to partner with us. We are also establishing the Center for Philanthropy, a home for families and individuals seeking highly specialized philanthropic services.

06. GROWING OUR TEAM'S STRENGTHS

Developing our team's talents through strategic hiring and trainings that will best serve the organization and our constituents.



07. EMBEDDING RACE, EQUITY, DIVERSITY, AND INCLUSION (REDI)

Updating our organizational policies and practices through the lens of equity and inclusion, and providing resources for nonprofits and donors to do the same.

08. INCREASING AWARENESS

Executing on an awareness campaign that elevates the visibility of the Foundation's work to our aspirational partners, donors, and friends.



Key Milestones

THE PACE AT WHICH WE WILL ADVANCE
OUR STRATEGIC PRIORITIES:

YEAR ONE

- Collect community and nonprofit data
- Re-orient grantmaking around critical issues
- Launch marketing campaign to increase awareness

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YEAR TWO

- Build community data center and story bank
- Launch capacity-building programs for nonprofit partners
- Introduce the Center for Philanthropy's programs and services for donors

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YEAR THREE

- Evaluate Strategic Plan's progress and effectiveness
- Conduct community needs assessment
- Launch community data center and story bank

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YEAR FOUR

- Create community needs "report card" based on assessment
- Convene community briefings to share "report card" findings

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YEAR FIVE

- Achieve \$400M+ in assets under management and sit in the top 5% of community foundations nationally
- Increase unrestricted and estate giving 10-fold to sustain long-term community support
- Evaluate progress and prepare new strategic planning process

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