

5/15/2015



ALLEN COUNTY
Community Health
Improvement Plan
for children

STEPPING
Up

2015-2018 STRATEGIC PLAN



Community Foundation of Greater Fort Wayne

Strategic Plan

Community Foundation of Greater Fort Wayne

2015-2018

Executive Summary

For 93 years, the Community Foundation of Greater Fort Wayne has worked to improve the quality of life for all residents of Allen County. As we approach the centennial of our organization, this strategic plan is designed to guide our efforts over the next three years.

We embrace the five pillars of Vision 2020, particularly the efforts in 21st Century Talent and Quality of Life. While different organizations each play a unique role in our regional efforts, **we believe that we can best achieve our mission by focusing in on three key areas:**

- Family Success
- Educational Attainment; and,
- Inspiring Places

Our obligation to our customer – the community of Allen County – is to develop goals in each of these areas and to **support nonprofit organizations** which can best help us achieve those goals.

In this strategic plan, we will be **stepping up** our efforts in important ways. First, we will step up and play a **stronger community leadership role** in targeted areas over the next three years. Our primary areas of community leadership focus will be:

- Riverfront development in Fort Wayne
- Allen County Community Health Improvement Plan for Children (CHIP)
- Pre-School Education, and
- Strengthening Nonprofit Organizations

In addition, we will also **step up** our efforts in our existing areas of strategic focus:

- Increasing awareness of the Community Foundation
- Growing our Assets and,
- Establishing a more intentional grantmaking process, linking funding priorities to outcomes

Mission Statement

The **mission** of the Community Foundation of Greater Fort Wayne is to **serve as a community leader to improve the quality of life by building permanent endowments, promoting effective grantmaking, fostering philanthropy, stimulating community dialogue and helping donors achieve their charitable goals.**

The Community Foundation works toward this mission in the following ways:

- As a **grantmaker**, ensuring effective grants that meet donors' charitable interests and address the community's changing needs
- As a **steward**, providing professional investment and financial services that preserve and enlarge a community pool of charitable funds
- As a **resource developer**, attracting permanent assets that supply flexible community resources for today and the future
- As a **philanthropic advisor**, offering information and advice that helps donors and nonprofit agencies achieve their objectives and improve the community
- As a **community leader**, stimulating community dialogue and decision-making that help define common goals and solve crucial problems

Statement of Values

As the designation of a public charity implies, the Community Foundation of Greater Fort Wayne exists because of public support. We take very seriously our obligation to earn the public's trust. The Community Foundation is accountable to the public for our operations. To that end, we reaffirm our belief in these values, which can provide assurance to our donors, grantseekers and the community that we will protect the assets entrusted to our care, make fair and unbiased, intentional decisions, and be a trusted organization for philanthropic endeavors.

- A **diverse, community-minded board of directors** and other volunteers who receive training to understand their responsibilities in providing oversight of the operations of the Community Foundation.
- **Open, honest and transparent communications** to our donors, which keeps them informed about the workings of the Community Foundation;
- A **commitment to the sanctity of the principal of endowment funds**, reflected in the desire to use a fair distribution for current community needs while preserving the corpus for future generations;
- An **engaged audit committee**, which hires our independent auditor and monitors the Community Foundation's internal controls.
- A **strong investment committee**, which is responsible for setting the Investment Policy of the Community Foundation and monitoring the performance of our investment managers.
- A **fair and unbiased grant review committee**, which is equally accessible by all nonprofits in our community.
- The **open and transparent philosophy** of the Community Foundation, which provides on our Web site a copy of our audit, tax return (Form 990), investment performance results, and a list of grants awarded.
- An **effective conflict of interest policy**, which requires anyone at the Community Foundation in a decision-making role—including board members, volunteers, and staff—to abide by our Conflict of Interest Policy.
- A **strict privacy policy**, which prohibits the Community Foundation from sharing information on donors or potential donors with anyone outside our organization.

Our Goals

To best serve all of the residents of Allen County, and to more effectively achieve the responsibility described in our mission statement, we will pursue the following four goals.

Goal 1: Expand our community leadership role – Given our robust financial position, access to information and strong reputation, the Community Foundation should expand its role as a community leader, stimulating community dialogue and supporting informed decision-making.

Goal 2 Increase awareness about the Community Foundation among key stakeholders – Despite all of our recent successes, it is our perception that the community’s understanding of our mission and operations is lower than we would like. Therefore, we will enhance our broad-based communications plan consistent with our strategic goals.

Goal 3: Grow our Assets – While we have realized impressive asset growth in the last two decades, we will aspire to achieve community-wide goals by more aggressively seeking resources to address pressing needs.

Goal 4: Establish a more intentional grant process, linking funding priorities to outcomes – While recognizing the limitations of our resources relative to the size of the nonprofit sector, the Community Foundation will more aggressively identify and measure the outcomes of our grantmaking process.

Each of these goals, and the related objectives, will be discussed in turn.



Goal 1: Expand Our Community Leadership Role

Northeast Indiana has embraced the five pillars of Vision 2020: *21st Century Talent*, *Business Climate*, *Entrepreneurship*, *Infrastructure* and *Quality of Life*. While each of these pillars represents an important part of the strategic direction for our region, as a charitable philanthropic organization the Community Foundation focuses primarily on the two pillars of *21st Century Talent* and *Quality of Life*. *Quality of Life* includes not only supporting families, but also creating and maintaining inspiring places.

As such, we believe that we can best achieve our mission of improving the quality of life for all persons in Allen County by focusing our efforts in three main areas:

- Family Success;
- Educational Attainment; and,
- Inspiring Places

Or, (with apologies to Nipsey Russell), we will support Stability (Family Success), Ability (Educational Attainment) and Civility (Quality of Place).

Our customer is the community. We accomplish our goals through local nonprofit organizations. We will support nonprofits that can help the community achieve its goals. We will also work to strengthen those nonprofit organizations so that they can do a better job of achieving their missions.

With these categories in mind, we will expand our leadership role in the following initiatives:

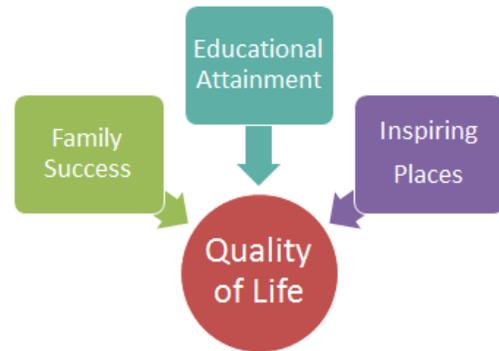
Riverfront Development – Perhaps no project has generated as much enthusiasm in recent years as the decision to significantly improve the riverfront area in downtown Fort Wayne. The impending release of the strategic riverfront plan will serve as a blueprint for future efforts. It is expected that, when completed, riverfront development will lead to a wide variety of recreational, retail and residential opportunities along the St. Marys, St. Joseph and Maumee Rivers.



Community Health

Improvement Plan for Children – Led by County Health Commissioner Dr. Deborah McMahan, the Community Health Improvement Plan for Children (CHIP) is an interdisciplinary effort to identify goals in seven areas of child development. The vision is to have all children in our county physically, mentally and spiritually healthy, educated to their highest potential, and economically prosperous.

Our Three Leadership Initiatives





Preschool Education – Scientific research continues to provide evidence that children pass through critical phases in brain development long before they enter Kindergarten. The State of Indiana has recently selected Allen County as one of five counties in the State to participate in a pre-school pilot project. Efforts in this area are being led by United Way of Allen County, and our role will be to provide support to all parties involved to make this project a success.

**Strengthening
Nonprofit Capacity**

– The Community Foundation cannot achieve its goals without the effective work of local nonprofit organizations. We have a history of providing support in this area, including the

Go! Series, financial support for strategic restructuring, as well as annual grants to support the work of the Paul Clarke Nonprofit Resource Center at the Allen County Public Library. Over the next three years, we will continue to find ways to increase the effectiveness of nonprofit organizations. This will include educational programs, planned giving assistance, other forms of support.



Goal 2: Increase awareness about the Community Foundation among key stakeholders

The Community Foundation recognizes that its work cannot be done without community partnerships. In order to enhance these partnerships, we will increase our efforts in awareness and knowledge of the Community Foundation through a broad-based communications plan highlighting not only the strategic goals but also the day-to-day activities keeping the mission vision and organizational operations in the forefront.

Objective: Increase Awareness Among the Entire Community – While we need to focus our efforts among key stakeholders, it is important that everyone in the community is aware of the mission and purpose of the Community Foundation.

Objective: Increase Awareness and Understanding Among Key Community Leaders – Community leaders in positions of responsibility should not only be aware of the Community Foundation, but should also have an understanding of what we can – and cannot – do.

Objective: Increase Awareness, Understanding, Action and Loyalty Among Current And Prospective Donors – We cannot achieve our goals without the support of donors. Our objective here is to make sure that current and future donors understand us to the point where they take action through their giving, and that we have built loyalty so that they not only continue giving but also include the Community Foundation in their estate plans.

Objective: Increase Awareness and Understanding Among the Leadership of Nonprofit Organizations. Nonprofit organizations are our key partners, so it is important that their staff and volunteers understand the various grantmaking programs of the Community Foundation as well as the advantages of a large and growing agency endowment.

Goal 3: Grow our Assets

Growing assets includes the prudent management of assets, as well as increasing the establishment of new funds to that community grantmaking can continue to benefit Allen County.

Objective: Add \$3 Million in Unrestricted Endowment Gifts by the End Of 2018 – While we want to increase the involvement of our donor advised funds in our leadership initiatives, the fact remains that we have the most flexibility in the use of grants from our unrestricted endowments in addressing important community needs.

Objective: Add \$10 Million in Restricted Endowed Gifts by the End Of 2018 – This increase in our restricted endowment asset base (currently about \$41 million) will add more than \$400,000 to our annual grant and scholarship awards.

Objective: Produce Investment Results that Exceed our Performance Benchmarks – Given the size of our asset base, even relatively small improvements in our investment results can result in significant asset increases over time. We will continue to develop an investment strategy designed to consistently exceed our performance benchmarks.

Goal 4: Establish a more intentional grant process, linking funding priorities to outcomes

While recognizing the limitations of our resources relative to the size of the nonprofit sector, it's time for the Community Foundation to more aggressively identify and embrace the outcomes sought by our grantees and to encourage collaboration.

Objective: Gather and Monitor Measures of Community Health – Allen County is blessed with numerous sources of data and information regarding a wide variety of community indicators. We should use this information as we make grantmaking decisions.

Objective: Link Our Philanthropic Resources to Community Needs – The information that we gather on the health of our community, combined with our leadership initiatives, should be used to drive our grantmaking decisions.

Objective: Continue To Look For Opportunities to Enhance the Effectiveness and Efficiency of Local Nonprofit Organizations – As we have done in the past, we should continue to look for opportunities to strengthen nonprofits through trainings, consultants and strategic restructuring.