



# STRATEGIC PLAN 2017 - 2020

January 2017



## SUMMARY

In 1998, a group of forward-thinking community leaders took an adventurous step by embracing the idea of helping to ensure a better quality of life for all in Anne Arundel County through perpetual philanthropy by creating the Community Foundation of Anne Arundel County (CFAAC).

Over the past 19 years, CFAAC has grown the total financial assets under management to \$9.5 million and 121 active funds. Thanks to the generosity of donors in the county, 2,472 grants totaling \$9,769,431 have been disbursed to over 400 unique nonprofits. We have also distributed \$325,000 in scholarships to graduating high school seniors. We are the largest institutional funder in Anne Arundel County.

Public, private, and corporate foundations serve as central pillars for the nonprofit sector in communities across the United States. There are a limited number of foundations located in Anne Arundel County and without CFAAC, a significant gap in funding would result for our local nonprofits.

Planning for the future is crucial. As local, state, and federal funding continue to decline, private donors are being called on to fill the gaps. At CFAAC, we believe we have more opportunity than ever to develop partnerships that yield real solutions to seemingly intractable societal challenges.

***CFAAC's role is to inspire and grow philanthropy, help to identify critical needs, partner with donors to help them meet their financial and philanthropic goals, and promote collaboration to help strengthen local nonprofits.***

It is a privilege to serve our community in this unique way. By partnering with individuals, couples, families, businesses, nonprofits, and other community agencies, we witness first-hand the results of generosity – both in time and money. We know that each one of us makes a difference. That is why we are focused on growing philanthropy one person, one family, one business at a time. The more of us who give, the more good we can do for our community, together.

Under new executive and Board leadership in 2016, the Board of Trustees and Staff Team embarked on a strategic planning process that included reviewing our history, our primary audience, and like-sized community foundation growth strategies and best practices. A Strategic Planning Subcommittee was formed and met multiple times to determine the final strategic priorities for impact and growth outlined in this document that will serve to guide the organization over the next four years. In addition, the following were also accomplished through the process:

- Refined the mission, vision, and values
- Reviewed the internal and external landscape
- Identified organizational strengths, opportunities, and external challenges in the light of feedback from community stakeholders
- Evaluated organizational operations, functions, and related systems

Thank you for taking the time to review this plan and for your ongoing support of CFAAC.

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*Manager, Grants & Scholarships*

**Jenn Sheppard**

*Manager, Philanthropic Services*

## **MISSION**

To inspire and promote giving in Anne Arundel County by connecting people who care with causes that matter.

## **VISION**

We envision a vibrant and generous community that comes together to enhance the quality of life for all.

## **VALUES**

- Excellence
- Partnership
- Professionalism
- Credibility
- Integrity
- Trust
- Impact

## 2017 – 2020 STRATEGIC PRIORITIES

The Community Foundation of Anne Arundel County recognizes the power of philanthropy to transform communities. While some of the work we have done in the past will continue, we believe that the priorities identified here will help to make a difference in strengthening communities and improving the quality of life for all residents in Anne Arundel County.

In addition to the traditional fund management and grant distribution services provided by community foundations, this plan acknowledges and defines our community leadership efforts that go above and beyond, providing high quality philanthropic services. CFAAC is a convener of service providers, a thought partner, an advocate for local nonprofits, and a catalyst for innovative ideas and community problem-solving.



## COMMUNITY IMPACT

***Increase fund assets, endowment assets, and annual grant and scholarship distribution.***

**Goal 1:** Continue to increase awareness about CFAAC's mission, role, and opportunities.

**Goal 2:** Expand and deepen existing relationships and build new relationships with professional advisors to grow them as a referral source.

**Goal 3:** Increase total Fund and Endowment Assets to \$20M by 2020.

**Goal 4:** Demonstrate community impact through increased annual grant and scholarship distributions.

**Goal 5:** Grow opportunistic grantmaking and funding partnerships by increasing CFAAC's designated funds and unrestricted funds.

**Goal 6:** Determine when and if CFAAC should develop focus priority giving areas and what the focus areas should be for greatest community impact.

## MEASURING SUCCESS

- Increased CFAAC awareness and brand recognition
- Increased number of referrals from professional advisors and others
- Increased total assets from \$9.5M to \$20M by December 31, 2020
- Increased annual grantmaking from donor advised funds proportionate to asset growth
- Increased number and size of scholarship funds
- Increased number of designated funds and unrestricted funds

## DONOR-CENTERED PHILANTHROPY

***Provide excellent philanthropic services and meaningful engagement opportunities for donors.***

**Goal 1:** Ensure high quality interactions and foster long-term investment and engagement with donors, fund advisors, sponsors, and giving circles.

**Goal 2:** Enhance donor and fund advisor events that focus on appreciation, networking, education, and collaboration.

**Goal 3:** Increase our focus on consistent and ongoing current donor stewardship along with new donor prospect analysis and engagement.

**Goal 4:** Explore the creation of annual large-scale, signature, multi-generational fundraising and recognition events.

### MEASURING SUCCESS

- Increased donor satisfaction reported in donor surveys, staff, and board interaction
- Enhanced and intentional donor events (e.g. fund advisors, legacy funds, potential donors)
- Greater participation in donor events
- Increased donor-initiated engagement, communication, and interaction

## COMMUNITY LEADERSHIP

***Increase awareness and foster dialogue, partnerships, and collaboration around critical community issues.***

**Goal 1:** Explore new and innovative opportunities to improve the next *Poverty Amidst Plenty Community Needs Assessment* (e.g. collaborate with the hospitals, United Way, County, online platform).

**Goal 2:** Refine CFAAC's community leadership role as unrestricted assets increase, and provide more opportunity and flexibility for leadership.

**Goal 3:** Provide excellent membership and logistical support to the Anne Arundel Estate Planning Council (AAEPC) members and Executive Committee.

**Goal 4:** Increase awareness about the social and economic impact and value of nonprofits by facilitating the coordination of the Community Impact Speaker's Series with our nonprofit partners.

**Goal 5:** Help develop strong and effective nonprofits by coordinating the Strengthening Nonprofits Collaborative and planning and facilitating a variety of capacity building trainings.

**Goal 6:** Participate in county and statewide efforts that position CFAAC as an essential philanthropic vehicle, key community builder, and relevant policy advocate.

## MEASURING SUCCESS

- Partnership developed with key stakeholders to build a county-wide, online indicators measurement system ("community report card")
- Increased requests to partner and assume leadership roles on key issues
- Increased AAEPC membership and membership satisfaction
- Increased attendance at Community Impact Speaker's Series events
- Increased number of high quality, affordable and relevant capacity building opportunities
- Meaningful participation in relevant county and state-wide efforts



## ORGANIZATIONAL EXCELLENCE

***Ensure organization excellence and create financial sustainability.***

**Goal 1:** Maintain operational excellence and credibility through the annual achievement of accreditation through the National Standards for U.S. Community Foundations.

**Goal 2:** Grow the Community Leadership Circle to \$500,000 by 2020 to fund operating costs.

**Goal 3:** Continue to grow on our cultural values of diversity, inclusion, professionalism, collegiality, quality, integrity, flexibility, and professional development.

**Goal 4:** Upgrade our fund management, fundraising, grantmaking, and scholarship technology platform.

**Goal 5:** Determine comprehensive and innovative approaches to Annual Giving and other fundraising campaigns.

## MEASURING SUCCESS

- Accredited annually by the National Standards for U.S. Community Foundations
- Annual budget goals met and operating reserve of at least \$200,000
- Greater donor, fund advisor, Board and Staff Team diversity
- Increased focus on Staff Team professional development
- Upgraded fund management, fundraising, grantmaking and scholarship technology platform
- Increased Annual Giving contributions

## PEOPLE

***Attract, engage, retain, and nurture Anne Arundel County's finest Board of Trustees and Staff Team.***

**Goal 1:** Become a Board of Choice with a strong community reputation for community leadership, and a highly satisfied and engaged Board of Trustees.

**Goal 2:** Recognized Employer of Choice with a reputation for highly competent, effective, efficient, and fulfilled staff team.

**Goal 3:** Continue implementation of annual goal-setting, performance management, and professional development.

**Goal 4:** Formalize an annual incentive structure aligned with accountability.

## MEASURING SUCCESS

- Increased Board of Trustees engagement, elevated level of volunteer satisfaction, and highly praised community reputation
- Highly effective and efficient Staff Team with a remarkable level of job satisfaction
- Increased participation in relevant professional development opportunities
- Formalized and budgeted annual staff incentive structure