

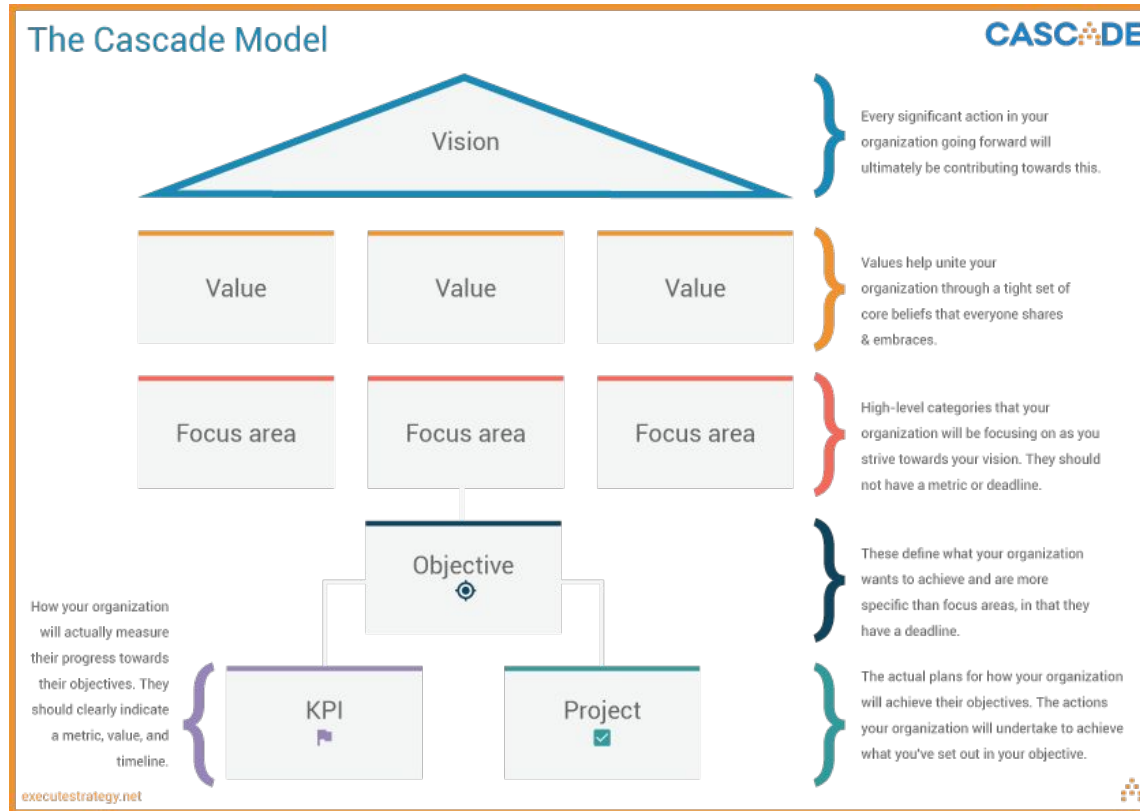


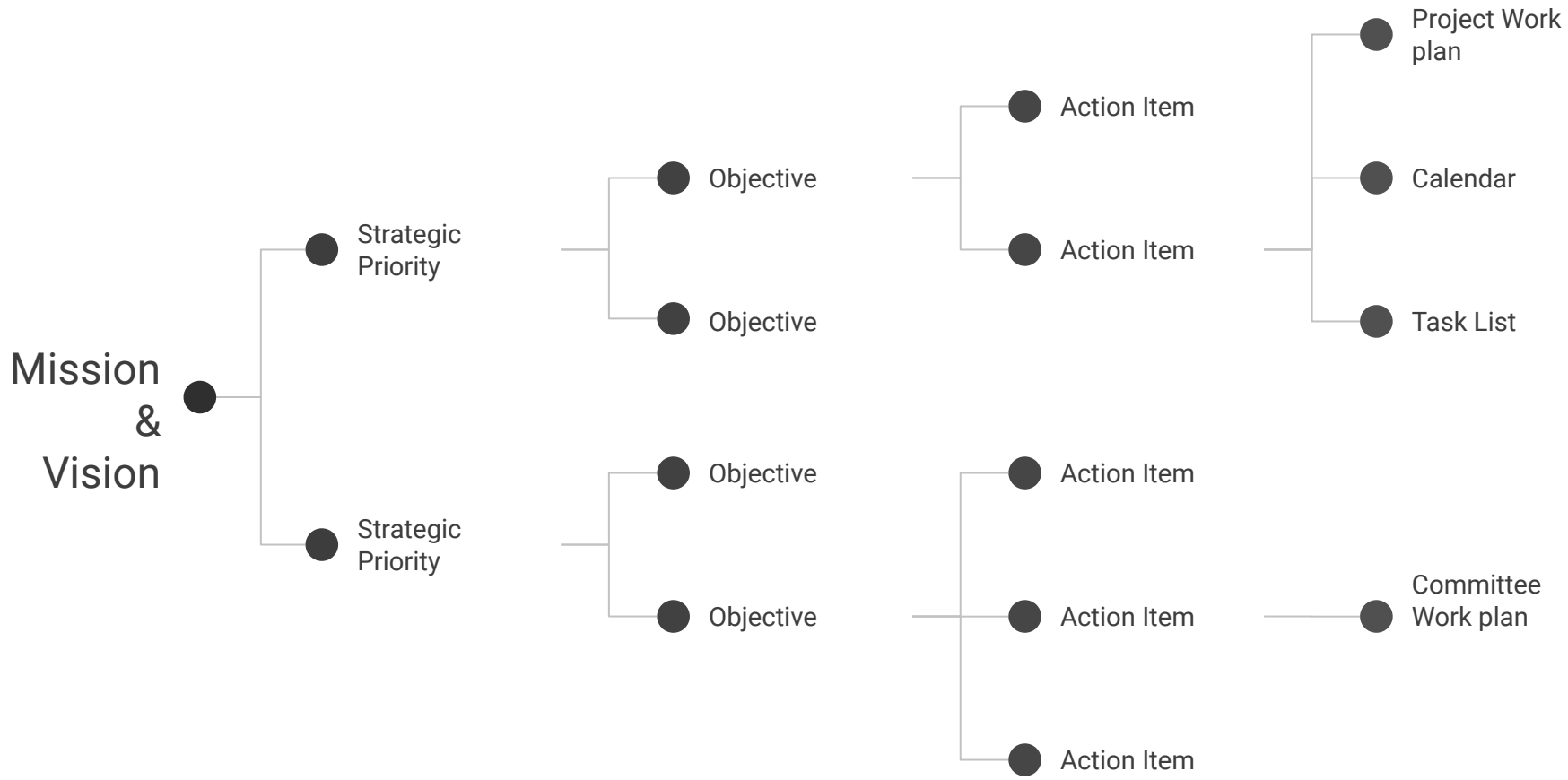
The Community Foundation of Dunn County STRATEGIC PLAN

2022 - 2027

THE STRATEGIC PLANNING PROCESS

We are using the Cascade Model for our planning:





Example of Changes from the previous format...

Focus Area 1: Strategic Fund Asset Development (Fund Asset Development Committee)

Objective 1: Shift Fund mix to optimize our endowed funds portfolio.

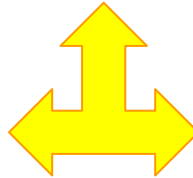
Objective 2: Increase from X% of endowed funds to Y% of endowed funds by X date.

Action Steps are different for New Fund Holders vs Existing Fundholders



EXPANDING PHILANTHROPY

Grow our permanent endowment by accepting new endowed funds and legacy gifts



DONOR-CENTERED PHILANTHROPY

Inspire current fundholders to give new dollars, endow current dollars, and award more grants

WHAT'S WHAT - THE DOCUMENTS

01

Strategic Plan

- Full 5-year plan
- Created by board, committees and staff
- Internal document for use by board, committees and staff



02

Work Plans

- Full plan translated into yearly work plans
- Created by staff; Identifies goals, action items, metrics and timelines
- Internal document for use by committees and staff



03

Strategic Plan Overview

- Summary of full plan listing strategic priorities
- One, easy to read, double-sided page created by staff
- External document for public/general audience





EXPANDING PHILANTHROPY

Grow our permanent endowment by accepting new endowed funds and legacy gifts

Champions: Fund Asset Development, Fundraising, Marketing & Communications

- ★ **DEEPEN RELATIONSHIPS WITH PROFESSIONAL ADVISORS**
 - 7 qualified referrals; 5 new funds; \$250,000 per year
- ★ **PROMOTE THE FOUNDATION AS A PHILANTHROPIC SOLUTION**
 - \$300,000 in new money in DAFs, Scholarship, Designated
- ★ **PROMOTE LEGACY GIVING, FOCUS ON UNRESTRICTED AND FOI**
 - 5 new legacy commitments per year
 - Minimum estimated future value of \$1 Million per year



NEW
FUNDHOLDERS

open NEW
endowed funds

NEW legacy gifts



DONOR-CENTERED PHILANTHROPY

Inspire current fundholders to give new dollars, endow current dollars, and award more grants

Champions: Fund Asset Development, Fundraising, Marketing & Communications

Ensure High-Quality Interactions And Foster Long-Term Investment By:

★ **Donor Advised Fund Holders**

- \$100,000 In New Money Added Into Existing Dafs
- \$50,000 Of Non-Endowed Converted To Endowed, And Upon Succession

★ **Designated Fund Holders**

- Inspire Designated Fund Giving Beyond Annual Disbursement

★ **Scholarship Fund Holders**

- Convert Non-Endowed To Endowed

★ **Collaborative Grantmaking Across Funds To Inspire Large-Scale Giving And Impact.**



CURRENT FUNDHOLDERS

build to endow

convert to endow

collaborate for
grant impact



COMMUNITY ENGAGEMENT

Target wide community support to build and grant funds for Education and Common Good.

Champions: Marketing & Communication, Fundraising

- ★ **Reach a more diverse audience through timely online giving campaigns**
 - \$200,000 per year
- ★ **Connect the community with local nonprofit needs**
 - Fully fund 3 or more grant projects using the online catalog
- ★ **Grow our brand and name recognition**



**BROAD
COMMUNITY
SUPPORT**

online giving
campaigns

grant catalog



LEADERSHIP & IMPACT

Grow and expand our services to strengthen the nonprofit community

Champions: Grants Committee

- ★ **Strengthen our nonprofit partners through capacity building, collaboration, and grantmaking**
- ★ **Improve and expand grantmaking using online system**
- ★ **Promote agency funds for nonprofit financial stability**
 - \$100,000 in new agency funds per year



NONPROFIT
PARTNERS

streamline
grantmaking

promote Agency
Funds



ORGANIZATIONAL EXCELLENCE

Secure future sustainability through prudent fiscal management and diversified revenue stream.

Champions: Finance Committee; CFDC Staff, Full Board

- ★ **Financial Stability– Eliminate dependency on Jeans & Jewels for operational expenses.**
 - An operational endowment with a 5% payout that offsets operational costs not paid through administrative fees.
- ★ **Optimize the use of technology to enhance operational efficiency in areas including resource development, stewardship and accountability, grant making and donor relations.**
 - Streamline operations to free up time for other activities
- ★ **Strengthen our capacity and sustainability as a Foundation**



OUR
ORGANIZATION

financial stability

operational
efficiency