

STRATEGIC PRIORITIES SUMMARY

1. Expanding Philanthropy Fund Asset Development Committee

Grow our community's permanent endowment, launch strategic new funds, and increase non-endowed donor-advised funds.

1. **Engage Professional Advisors** – Build strong, ongoing relationships with attorneys, CPAs, and financial planners.
2. **Promote the Foundation as a Giving Partner** – Position us as the go-to resource for donor-advised funds and philanthropic guidance.
3. **Grow Legacy Giving** – Encourage estate gifts, with a focus on unrestricted and field-of-interest funds.
4. **Support Nonprofit Sustainability** – Promote agency endowments as a tool for long-term financial strength.
5. **Deliver Exceptional Donor Service** – Provide high-quality, consistent stewardship to inspire long-term investment and deeper engagement.
6. **Enhance Philanthropic Support** – Offer ongoing services, education, and events to strengthen donor relationships and encourage giving.

2. Grow Our Brand Marketing & Events Committee

Elevate and engage our community through brand awareness, storytelling, and events.

1. **Strengthen Brand Recognition** – Build consistent, visible branding across all channels.
2. **Elevate Events** – Make events powerful tools for visibility and relationship-building.
3. **Reach New Donor Segments** – Engage donors across life stages, including young professionals, dual-income couples, retirees, and legacy-minded individuals.
4. **Amplify Storytelling** – Share compelling impact stories to deepen community connection.
5. **Modernize Communication** – Refresh digital and print tools to boost engagement.

3. Community Impact Grants Committee

Expand our services to nonprofits and increase community-informed grantmaking.

1. **Improve and Expand Grantmaking** – Increase accessibility, flexibility, and responsiveness—and encourage donor-advised fundholders to co-invest in community needs.
2. **Strengthen Our Nonprofit Partners** – Offer tools, training, and personalized support to help nonprofits thrive.
3. **Connect the Community with Local Needs** – Share nonprofit stories and elevate urgent local issues to inspire donor and public support.

4. Organizational Excellence Executive Committee

Ensure long-term sustainability through strong operations, diverse revenue, and sound fiscal management.

1. **Diversify Revenue for Stability** – Reduce reliance on the Jeans & Jewels Gala for operations by expanding other funding sources.
2. **Leverage Technology for Efficiency** – Use digital tools to improve processes in fundraising, grantmaking, stewardship, and data management.
3. **Strengthen Internal Capacity** – Invest in staff development, systems, and planning to support long-term growth and impact.

STRATEGIC PRIORITY 4: ORGANIZATIONAL EXCELLENCE

Champions: Executive Committee

Ensure long-term sustainability through strong operations, diverse revenue, and sound fiscal management.

Objective: OUR ORGANIZATION

1. **Diversify Revenue for Stability** – Reduce reliance on the Jeans & Jewels Gala for operations by expanding other funding sources.
2. **Leverage Technology for Efficiency** – Use digital tools to improve processes in fundraising, grantmaking, stewardship, and data management.
3. **Strengthen Internal Capacity** – Invest in staff development, systems, and planning to support long-term growth and impact.

#	Action Item Description	Measurable/ Metric	Who is Responsible?	Timing
1	Have monthly Executive meetings to review board objectives, meeting agendas, operational issues, and assessing Executive Director's progress on annual goals.	# of Executive Meetings	Executive Committee	Monthly
2	An active Finance Committee that develops and monitors budget to actual results, makes recommendations about our fee structure and approves use of reserve funds.	# of Finance Cmt Meetings; YE end Budget Report with variance.	Finance Committee & Executive Director	Quarterly
3	An active Investment Committee that provides guidance to maximize returns while ensuring the soundness and safety of our assets.	Annual rate of return Annual spendable allotment	Investment Committee	Quarterly or as needed

4	Regularly review and update technology tools, including accounting and CRM (CSuite) software, to improve efficiency and support growth.	Conduct an annual review of core software systems (accounting, CRM, etc.) and document at least one improvement or upgrade each year.	Executive Committee	Annual
5	Grow the talent and performance of staff through performance reviews and professional development opportunities.	Performance review results, # professional development opportunities; % of PD \$\$ used year over year.	Executive Director	Quarterly