

Strategic Plan

May 16, 2022

Our roadmap to a healthy, thriving,
sustainable Macon County.

Overview Statement

The CFMC encourages philanthropy and the growth of charitable resources among individuals, families, businesses and community institutions. We work to develop and effectively manage charitable funds and endowments, offering the highest levels of service and expertise to donors and their successors.

Sustainable funding initiatives are imperative to our ability to actively address the needs of the community by examining issues, securing and distributing resources, advocating for positive change, and convening conversations which encourage donors and the community to respond.

The following pages outline the goals that will position us to continue to be the leader in our community in making a positive **IMPACT** through **giving, awareness** and **collaboration**.

Overview Statement

For over 21 years, The Community Foundation of Macon County has:

- ◆ Inspired giving
- ◆ Matched community needs with donors' passions
- ◆ Expanded awareness of philanthropy
- ◆ Engaged community problem-solving
- ◆ Built trust with diverse and under-resourced communities
- ◆ Grown assets to increase impact

Our Vision | Our Mission

Our Vision

Our vision is to build community philanthropic resources to improve the quality of life for all residents of Macon County.

Our Mission

Our mission is to connect the philanthropic goals of donors with the needs of Macon County, and through leadership and community engagement identify and address those needs.

What Do We Do

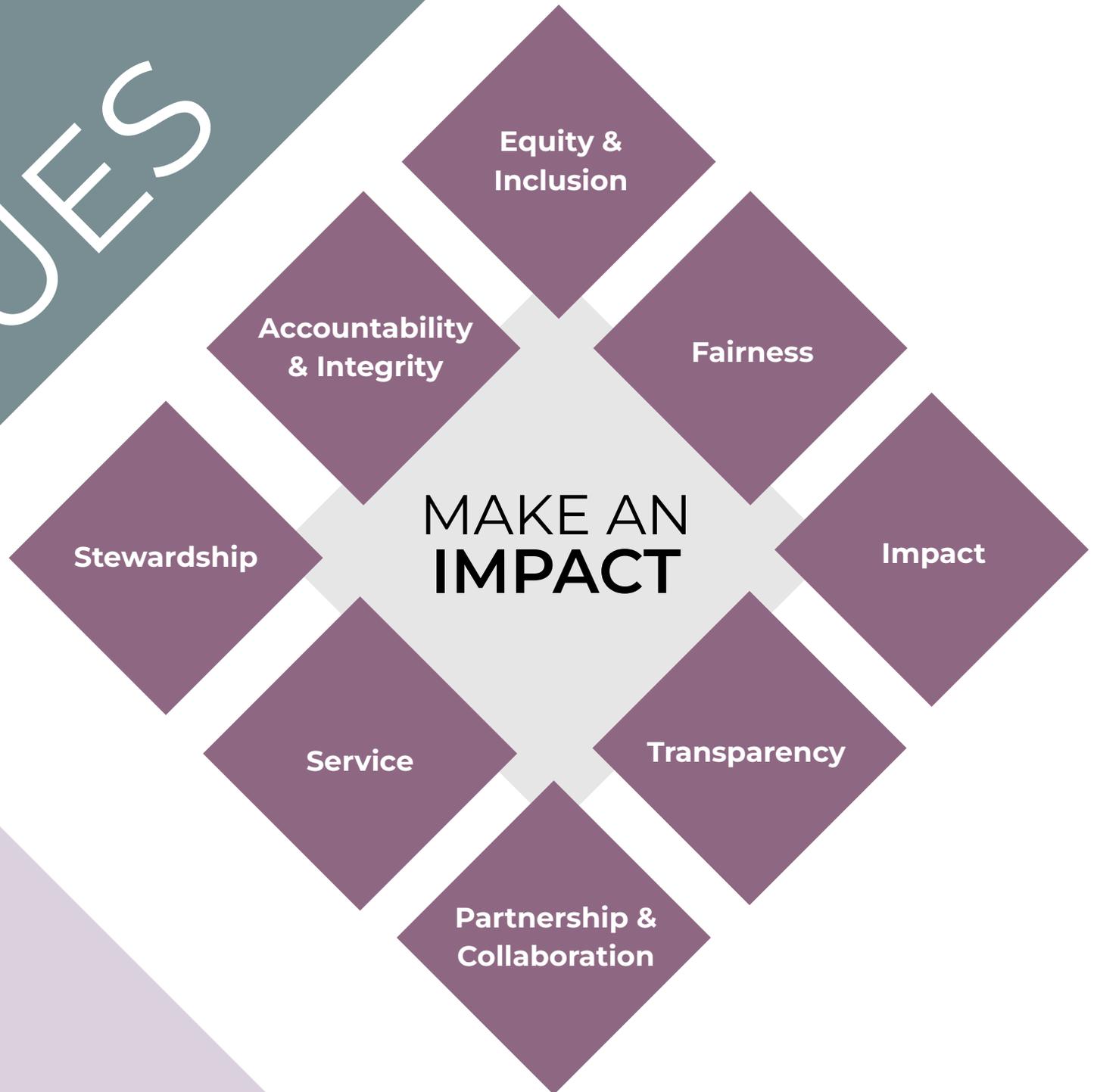
Our Role

- ◆ Convene and promote philanthropy.
- ◆ Serve as intermediary organization.
- ◆ Enhance community leadership.
- ◆ Promote community development.
- ◆ Increase the accountability and operating standards of nonprofits.
- ◆ Focus resources to provide in times of disaster/emergency response.

External VALUES



Internal VALUES



TRANSFORMATIONAL GOALS

Transformational Goals

1. Asset Growth
2. Community Collaboration & Leadership
3. Communication & Brand Amplification
4. Donor Services & Engagement
5. Systems Improvement & Expansion
6. Talent & Organizational Development

Transformational Goals

1

Asset Growth

Our ability to help create transformational change rests upon the growth of our endowed assets.

- ◆ Build endowment assets to \$35 million by 2025 (currently at \$26 million).
- ◆ Increase operating endowment to \$3.4 million by 2025 (currently at \$2.2 million).
- ◆ Increase assets under management to \$67.5 million by 2025 (currently at \$53 million).
- ◆ Increase corporate matching.
- ◆ Cultivate bequests.
- ◆ Cultivate annuities.
- ◆ Ensure our fee structure is competitive and covers costs for all types of funds.

2

Community Collaboration & Leadership

Social Service Master Plan: One of the main themes that came out of the DCC focus groups was the potential for community agencies to partner. There is overlap in organizations and the needs of the community which they serve. Collaboration will allow for greater impact on the areas of need.

- ◆ Unite our Board of Directors and nonprofit advisory board members to strengthen impact and solidify a network of philanthropic leaders.
- ◆ Advance / be a steward of equity and inclusion. Acknowledge the impact of these systems in our community.
- ◆ Cultivate opportunities with influencer groups such as brokers, investors, bankers, attorneys, accountants, school districts, pediatricians, business leaders and YLIA parents.

Transformational Goals

3

Communication & Brand Amplification

- ◆ Communicate strengths and value proposition of the CFMC - including leadership, board of directors, investors, nonprofit impact, service/responsiveness, ease of giving.
- ◆ Strengthen knowledge of how to use/access/give to the CFMC.
- ◆ Improve digital media presence.
- ◆ Expand social media engagement by sharing and following key partners.
- ◆ Continue to develop and strengthen partnership communication.
- ◆ Enhance education/advocacy around giving to all audiences.
- ◆ Communicate/develop resources that make accessing nonprofit needs more readily available.
- ◆ Donor stewardship.
- ◆ Be a key resource for tax policy.
- ◆ Plan for 25th anniversary.

4

Community Collaboration & Leadership

Existing Donors:

- ◆ Connect with major donors to ensure funding sustainability.
- ◆ Create awareness of concierge services.
- ◆ Engage and connect with Legacy donors.
- ◆ Share Transfer of Wealth resources.

New Donors:

- ◆ Reach a more diverse donor group and bring together more voices to shape philanthropy in our community.
- ◆ Accelerate the growth opportunity for the CFMC.
- ◆ Lower level of entry.
- ◆ Market growth opportunities focused on influencers as referral sources.
- ◆ Refine suite of philanthropic solutions.

Transformational Goals

5

Systems Improvement & Expansion

- ◆ Use technology to reach more philanthropists and build capacity to scale our charitable services.
- ◆ Expand relationship management software utilization for donor tracking, reporting and managing.
- ◆ Implement best-in-class practices for administrative, operational and financial systems.
- ◆ Promote data-driven philanthropy through leadership and relevant reports.
- ◆ Review grantmaking processes and outcomes.
- ◆ Review scholarship cost/return ratios.

6

Talent & Organizational Development

- ◆ Clearly define roles and job descriptions for each employee.
- ◆ Cross train and develop an internal succession plan/strategy.
- ◆ Develop committee to board pipeline.
- ◆ Conduct annual board survey.
- ◆ Enhance board experience.
- ◆ Ensure opportunities for employee advancement, professional development and/or additional training.

STRATEGIES & INITIATIVES

Framework for Action

Goal 1: Asset Growth

Action steps:

- ◆ Conduct a review of existing funds detailing: types of funds, average fund balances, estimate staff time developed to each type. Use data to determine types of funds exhibiting growth opportunities.
- ◆ Monitor fee structures and adjust as needed.
- ◆ Form an asset development committee that includes donors who contribute more than \$25,000 annually.
- ◆ Explore development of women's giving circle.
- ◆ Explore employee giving/corporate match programs.
- ◆ Develop agricultural engagement/crop gift program.
- ◆ Increase engagement with financial advisors.
- ◆ Increase receipt of bequests and annuities.
- ◆ Increase awareness of operating endowment and ask donors to invest directly in the Community Foundation.
- ◆ Retool scholarship offerings to streamline processes, reduce costs and generate additional revenue.

Goal advisors:

- ◆ Missy, Chasity and Natalie

Goal 2:

Community Collaboration & Leadership

Action steps:

- ◆ Prioritize community impact areas.
- ◆ Identify community organizations that align with each impact area.
- ◆ Outline programs requiring support by area of impact. Implement an evaluation protocol for potential initiatives to determine feasibility, impact, risk and community benefit.
- ◆ Develop and promote sophisticated giving portfolios and strategically identified co-investment opportunities.
- ◆ Develop nonprofit collaborative to provide capacity building and training opportunities for nonprofit organizations.
- ◆ Advance equity and inclusion via project collaboration and capacity building.

Goal advisors:

- ◆ Natalie and Missy oversight
- ◆ Rachel

Goal 3:

Communication and Brand Amplification

Action steps:

- ◆ Develop and implement a marketing plan that includes an awareness and a mixed-media marketing campaign to educate the public about endowments and structured philanthropy, help nonprofits build organizational funds and increase lifetime and planned endowment gifts.
- ◆ Utilize social media more effectively to expand CFMC visibility and generate additional funding.
- ◆ Increase CFMC visibility through a speakers bureau, board and staff representation, presence at major events and increased strategic partnerships.
- ◆ Increase reports of impact, achievements and opportunities for involvement to the broader community.
- ◆ Plan how to utilize CFMC's 25th anniversary in leveraging donor and community engagement and awareness.

Goal advisor:

- ◆ Rachel

Goal 4:

Donor Services and Engagement

Action steps:

- ◆ Implement a CRM system that aligns each donor with a dedicated, skilled, proactive, professional staff member.
- ◆ Enhance donor educational offerings to increase learning, encourage collaboration and foster networking.
- ◆ Grow CFMC's grantmaking and increase repeat giving to established funds by re-engaging and incentivizing inactive donor advisors.
- ◆ Better inform fundholders about their fund activity, the impact of their grantmaking and the Foundation's financial position and investment performance.
- ◆ Offer low-entry point giving options for new and younger donors to grow a fund over time.
- ◆ Identify corporate giving gaps and potential to grow, including employee matching program awareness.

Goal advisors:

- ◆ All staff
- ◆ Community organizations

Goal 5:

System Improvements and Expansions

Action steps:

- ◆ Develop longterm strategic plan to reach legacy prospects and monitor engagement.
- ◆ Create data-driven reports to promote philanthropic impact.
- ◆ Monitor best-in-class practices for administration, operational and financial systems.
- ◆ Develop a coordinated grantmaking approach that is integrated, flexible, community-oriented and efficient.
- ◆ Explore alternative means of deploying resources in support of nonprofits.

Goal advisors:

- ◆ Chasity

Goal 6:

Talent and Organizational Development

Action steps:

- ◆ Review roles and job descriptions for all employees.
- ◆ Create clear roles for all volunteers.
- ◆ Add staff as needed based on asset growth.
- ◆ Create Presidents Council – chaired by Cathy Mansur – provides guidance to CEO. Meets annually and includes past CFMC board chairs.
- ◆ Develop back-up process and procedures for vital business operations in situations where key board or staff leadership is unavailable.
- ◆ Incorporate core values into job requirements, support professional development.

Goal advisors:

- ◆ Natalie and Missy

PERFORMANCE METRICS

3-Year

Performance Metrics Goal 1:

Asset Growth

Benchmarks:

- ◆ Meet asset growth goal of \$67.5 million by 2025. Track year over year growth.
- ◆ Form asset development committee.
- ◆ Complete asset development plan.
- ◆ Investment performance historical benchmarking/future forecasts.

Performance Metrics Goal 2:

Community Collaboration & Leadership

Benchmarks:

- ◆ Measure social benefit achieved in relation to expended resources.
- ◆ Increase capacity building among nonprofit organizations. CFMC will serve as knowledge hub, relationship broker and community leader.
- ◆ Increase diversity among nonprofit staff and boards.
- ◆ Increase diversity among organizations receiving grants.
- ◆ Increase support of causes which support social justice.
- ◆ Measure number of individuals served through our grantmaking.
- ◆ Track programs receiving funding (grant clusters) and national indicators.
- ◆ Increase use of CANDID grant research resource.

Performance Metrics Goal 3:

Communication & Brand Amplification

Benchmarks:

- ◆ Growth in social media engagement.
- ◆ Output and interest in foundation work (number of publications/ads/donor touches).
- ◆ Track amplification, applause and conversation rates.
- ◆ Track donor conversations/engagement by social media channel.

Performance Metrics Goal 4:

Donor Services and Engagement

Benchmarks:

- ◆ Track growth in number of donors/funds.
- ◆ Track growth in giving outside of Decatur, Mt. Zion, Forsyth.
- ◆ Track donor retention rate, percentage of donors who have given more than once.
- ◆ Increased donor satisfaction regarding customer service.

Performance Metrics Goal 5:

System Improvements & Expansions

Benchmarks:

- ◆ Grant dollars issued through more efficient processes.
- ◆ Operating expenses less than annual revenue.
- ◆ Attain and maintain National Standards credential.

Performance Metrics Goal 6:

Talent & Organizational Development

Benchmarks:

- ◆ Growth of team members to lead and own more responsibilities.
- ◆ Annual board survey.
- ◆ Develop of succession plan.
- ◆ Obtain relevant professional credentials.

Appendix

TALENT & ORGANIZATIONAL DEVELOPMENT

Organization Chart

Natalie Beck President



- Works w/major donors
- Major initiatives & workplan
- Macon County Legacy and nonprofit outreach
- Coordinate grant programs
- Leading and convening around community issues
- Board education
- Manages VP, Director of Communications, YLIA

Missy Batman Vice President



- Works w/all donors
- Donor education, development and outreach
- Financial advisor (brokers and CPAs) outreach and relationship building
- Bequests - planning and processing
- Attorney outreach and relationship building
- Legal issues and research
- HR - compliance, discipline
- Finance - monthly financial statements/annual budget/cash flow/investments
- Audit process - transitioning to Chasity over next 2 years

Temethia Joyner YLIA Facilitator



- Manage all aspects of Young Leaders In Action

Rachel Moran Director of Communications



- Nonprofit Collaborative Director
- Create Donor Education and Donor Stewardship Materials
- Assist President w/Macon County Legacy outreach
- Outreach w/EDC, city, and outlying cities
- Marketing - digital media, radio, print pieces, website and video
- Branding
- Research

Organization Chart

Missy Batman
Vice President



- Works w/all donors
- Donor education, developmen, and outreach
- Financial advisor (brokers and CPAs) Outreach and relationship building
- Bequests - planning and processing
- Attorney outreach and relationship building
- Legal issues and research
- HR - compliance, discipline
- Finance - monthly financial statements/annual budget/cash flow/investments
- Audit process - transitioning to Chasity over next 2 years

Chasity Casey
Director of Finance



- Finance - monthly donor reports/monthly investment recording and asset allocation
- Leads annual audit
- Grant and scholarship processing
- Assists w/HR - by managing payroll/QSHERA/retirement
- Manages Office & Technology Manager and Scholarship Coordinator

Organization Chart

Chasity Casey
Director of Finance



- Finance - monthly donor reports/monthly investment recording and asset allocation
- Leads annual audit
- Grant and scholarship processing
- Assists w/HR - by managing payroll/QSHERA/retirement
- Manages Office & Technology Manager and Scholarship Coordinator

Candra Reed
Office & Technology Manager



- Answers phones
- Orders and manages supplies
- Sends fund anniversary cards
- Creates thank you and grant letters
- Assists with grant processing
- Makes deposits and manages mail
- Event assistance
- Vendors - technology/insurance/banks/brokers/phones
- Facilities - construction/cleaning/keys
- Maintains liabilities spreadsheet
- Maintains MCL Wish List

Kathy Carter
Scholarship Coordinator



- Manages all aspects of high school and adult scholarships

SWOT LEARNINGS

One Word

BOARD

- Impactful
- Philanthropy
- Compassion
- Flagship
- Effective
- Community
- Legacy

COMMUNITY LEADERS

- Leadership
- Visionary
- Resource
- Strategic
- Impactful
- Evolving
- Collaborative
- Connector
- Supportive
- Easy
- Valuable
- Aggregator

NONPROFIT LEADERS

- Supportive
- Bang
- Collaboration
- Filler
- Accessible
- Shine
- Partner
- Impactful
- Connector
- Multidimensional
- Proactive
- Innovative
- Foresight
- Creative
- Fundamental
- Synergy
- Bridger

STRENGTHS

- Simplicity in donation process – complex made simple
- Trusted, Engaged and Connected Leadership - Natalie and her approach, Missy and her strong relationships, diversity and strength of Board of Directors
- Strong Investment team working with CF
- Identify Needs, Find Donors, Channel Funds: CF is really great at identifying needs, first – proactive, flexible approach to then match donors
 - Pandemic relationship with nonprofits was exceptional, working with them on their biggest needs were.
 - Creative and Innovative in their approach to developing funding opportunities
- Ability to connect and match donors (passions) to needs
- Trusted, knowledgeable and effective resource for organizations and donors
 - Intentional and invested in the community
 - Truly understand the needs of the community and passion of donor
- Accountability for results when money is provided – measure outcomes
- Communication – open/two-way, expanded approach to marketing, strategic public exposure connecting and messaging through impact stories.
- Respected across nonprofit organizations throughout the area
- Collective resources allows for money to build vs. individual growth
- Sustainable Funding
- Personal interface and ability to be quickly plugged into the community
- Better option than starting own Foundation

OPPORTUNITIES

- Identify need gaps - Develop a list of needs where there aren't donors
- Communication
- Awareness gap - what does the Community Foundation do? How do you access funds
- Education of opportunities to get involved
- Legacy, generational outreach
- Power of the work, the impact they are making – incentive for others to give
- Collaboration of organizations, to leverage resources where there is overlap in missions (United Master Plan for Social Services was suggested by Sophisticated Donors, Leaders and Nonprofits)
- Continue to include diverse groups, listening to impact change needed
- Bring in younger influencers – YLIA
- Get more involved with community organizations. i.e. churches, build relationships deep in the community, create ambassadors
- Smaller donation programs, engage younger demographic early, use new technologies and expand funding programs to new generation donors “Venmo” \$365 campaign, Payroll Deduction, larger % of smaller individual gifts
- Building larger database of donors, cultivate opportunities with influencer groups such as brokers, investors, bankers, legal, accountants, school districts, pediatricians, business leaders, YLIA parents
- Cultivate and build a next generation plan for existing donors to ensure generational wealth giving continues
- Have an entrepreneurial investment growth plan
- Continue building new and deeper relationships with donors, nonprofits, and influencers
- A tool that gives a broader understanding of all resources available
- More appreciation to donors

RISKS

- Leadership turnover/succession
- Social Justice focus - Conflict between community needs and donor views
- Loss of large donors - Aging donors, donors leaving community
- IL Tax Policies – people leaving the state
- Federal Tax Policies
- Ego, not willing to work together
- Aging population, wealth moving out of town, and not staying engaged
- The word Foundation can sometimes block people from thinking they can participate
- Keep from starting programs, stay focused on funding and helping others do great work

MAJOR DONORS & LEADERS

How got involved

- Nonprofit leader
- Family legacy
- Larry, Lucy, Doug- founders
- Board involvement
- Personal Attorney

Motivations

- Connection with the community and their passions
- Family legacy of giving, model for next generation to give
- Faith
- Trust and Connections
- Connection with Cause, Community minded

Why Community Foundation

- Flexibility in giving to multiple causes
- Supports a passion
- Trust in investment management
- Dollars go to relevant community needs to make an impact
- Pulls the community together to get things done
- Helps evaluate biggest impact for contribution amount

MAJOR DONORS & LEADERS

Perception

- Dynamic and diverse board
- Respected staff
- Focus needs with donors
- Strategic positioning with nonprofits
- Fabric of the community
- Relationship builder
- Dollars used for impact

Value in Giving

- Connect community needs with donor passions
- Re-grantor
- Leadership – President, Staff and Board
- Investment team
- Accountability for impact
- Makes giving easy

MAJOR DONORS & LEADERS

Do Better

- Explain how it works, how you get involved
- Legacy development
- Donor connection when leave community
- New ways to give, smaller donors
- Keep funds local
- New donor development
- Apply for grants
- Teach younger generation to give
- Focus on diversity and Inclusion issues to impact business growth
- Organize by areas of focus – we have multiple charities doing the same thing
- Educate employees at local businesses about Community Foundation
- Eliminate minimum donation requirement

Passion Causes

- Education
- Arts
- Healthcare/Cancer Research
- Environment
- Youth Programs
- Diversity and Inclusion
- Entrepreneurial Growth
- Workforce Development
- Poverty/Homelessness
- Family Planning
- Agriculture
- Literacy
- Conservation district
- Neighborhood revitalization

MAJOR DONORS & LEADERS

Causes / Needs

- Easier way for sustainable funding
- Focus on Mental Health and Wellness
- Inclusion, DEI, including Justice
- Resource Recruitment (staff and volunteers) and Development
- Poverty and poverty-related issues
- Food, Housing and Violence
- Entrepreneurial Growth
- Safe & Affordable Housing
- Reduce Need for Services, Review the Buffett Needs Assessment