

# Strategic Plan

**Adopted October 8, 2013**

**Revised July 2014**

**Revised November 2015**

**Revised November 2016**

**Revised September 2017**



## INTRODUCTION



The following Strategic Plan was first adopted in 2013 after a two-year process involving significant staff and board effort. The plan has evolved and adapted, and it is reviewed at least annually to ensure that it continues to reflect the strategic direction desired by the board. This Strategic Plan does not sit passively on a shelf, but instead, guides the work of the Foundation on a daily basis. Everything from the President’s regular written reports to the board, to the agenda of staff meetings is informed by and organized around the Strategic Plan.



## Strategic Framework, Mission, Vision and Values

### Strategic Framework

Our strategic framework reflects not only what we do, but also how we do it. While the **what** is largely mission and resource driven, the **how** is values driven.

### Vision

To fuel positive change through the power of community.

### Mission

We increase generosity and power community for positive change.

### Values

Our values are the foundation of our strategic framework.

#### Innovation

We reexamine and challenge existing paradigms, seek new ideas and embrace responsible risk-taking.

#### Integrity

We hold ourselves and others accountable — courageously doing what we believe is right and best for Community First Foundation and those we serve.

#### Service

We are timely and responsive. We strive to anticipate the needs of others and for our interactions with all people to be positive, thoughtful, respectful and sensitive to their points of view.

#### Stewardship

We value the trust others place in us. We work responsibly, nurture relationships and take action in the best interest of those we serve.

### How We Work

As a leading community foundation, we fuel the power of community for positive change. Our vibrant energy, innovative leadership and trusted stewardship of financial resources energize giving, strengthen nonprofits, support donors and address community needs. In our work, we



serve as a connector, partner, collaborator and resource in Jefferson County, the Denver metropolitan area and beyond.

### Connector

- We connect the givers and the doers.
- We use our Jefferson County, Denver Metro and statewide networks to power positive change.
- We bring community leaders together to address community issues.

### Nonprofit Partner

- We identify innovative and collaborative ways to strengthen the nonprofit community.
- We employ our community connections, tools, resources, education and knowledge to help nonprofits advance their mission.
- We understand that we cannot achieve our strategic goals without the partnership and success of our grantees.
- We are a trusted steward of nonprofit funds that help nonprofits grow and secure their future.

### Donor Partner

- We inspire, engage and empower donors.
- We help donors make a difference in ways that matter to them.
- We are a reliable and trusted steward of donor funds.

### Collaborator

- We look for ways to fuel the power of community for positive change through partnerships and shared purpose.
- We work collaboratively with individuals, organizations and funders to address community challenges in new ways.
- We lead and facilitate collaborative vision setting and collective problem solving.
- We are innovative, community-focused and community-driven.

### Resource

- We use our resources, expertise and strategic insights to identify and fund impactful community programs.
- We find smart, innovative ways to strengthen our community.



### Strategic screen: factors for evaluation of strategic opportunities

Strategy is not only what we do, but how we evaluate opportunities to further our mission given our resources, expertise and experience. We believe our resources are best used when one or more of the following factors are present:

#### Scale

- It is a niche opportunity where our limited resources can make a difference (i.e. the battle is big enough to matter but small enough to win).
  - For example, integrating mental health and wellness into pediatric practices will improve care for thousands of children and their families.

#### Innovation

- It presents an opportunity to re-exam the status quo, in both process and outcome, and develop better approaches and new solutions to unmet need.
  - For example, The Innovators Society has targeted promising but unproven approaches using a non-traditional grantmaking process that incorporates capacity building and community engagement.

#### Leverage

- It is an opportunity to create economies of scale where none exist.
  - For example, ColoradoGives.org is an online giving platform that serves thousands of nonprofits and avoids the expense of duplicating the same platform thousands of times.
- It is an opportunity to combine mission with asset growth or serve multiple strategies.
  - For example, increasing nonprofit endowments has the potential to grow assets, strengthen nonprofits and inspire donors.

#### Community Engagement and Collaboration

- It involves the community in our work.
  - For example, Colorado Gives Day engages thousands of nonprofits and donors in a day of supporting and celebrating Colorado and in 2016, the Innovators Society engaged the community directly in a creative grantmaking approach.
- It allows us to work with others.
  - For example, in promoting early childhood mental wellness and resilience, we collaborate with those working to improve early childhood healthcare and early childhood education.



### Geography

We began as a foundation affiliated with Lutheran Medical Center with a geographic focus primarily on Jefferson County and then expanded our grantmaking to the seven county Denver metropolitan area (Adams, Arapahoe, Boulder, Broomfield, Denver, Douglas and Jefferson counties). In 2007, we launched ColoradoGives.org, which is available to nonprofits throughout Colorado.

Our focus narrows as our geographic reach expands. In other words, the range of activities we support in Jefferson County is greater than what we support in the seven county metropolitan area, which is greater than what we support statewide.

## CORE CAPACITY



### Strong Board

**Ensure a qualified and motivated Board to provide governance, development and oversight.**

- Ensure a board that reflects the diversity of the communities we serve.
- Build/strengthen the fundraising culture and capacity of the board.
- Build/strengthen the community influence of the board.
- Provide quality orientation and on-going board education.
- Continually evaluate and adapt to assure the quality of board engagement and service.

### High-Performing Staff

**Ensure a qualified and motivated staff able and willing to execute the Foundation's mission in an ever-changing environment.**

- Ensure staff capacity in the following areas:
  - Technology and data – Understanding the technology supporting our programs and operations (*e.g.*, ColoradoGives, Raiser's Edge, iCommunity), the data they generate and the potential for new applications; staying abreast of technology trends in charitable giving, fundraising, nonprofit operations and risk management.
  - Financial – Having the internal and external investment expertise to manage and evaluate the Foundation's investment activities, including impact investing.



- Fundraising – Having the capacity to cultivate major donors and endowment partners.
- Grantmaking – Having the ability to identify and evaluate strategic, innovative and impactful grantmaking opportunities.
- Attract and retain top performers.
  - Monitor compensation, benefits, HR policies and adjust as needed to remain competitive.
  - Invest in staff training and development.
  - Ensure a culture of respect, cooperation, inclusion and teamwork.
  - Ensure a staff that reflects the diversity of the communities we serve.
  - Provide a healthy work environment that supports mental and physical wellness.

### Operational Efficiency

#### Ensure the Foundation has the tools, systems and processes needed to support its work.

- Maintain physical office environment that supports innovation, teamwork and efficiency.
- Continuously evaluate and improve framework for managing and evaluating grantmaking.
- Continuously evaluate and improve systems and technology to increase organizational efficiency.
- Enhance endowment partner, donor-advised fund advisor and grantee experience.
- Continuously evaluate and improve communication tools (i.e., remote connectivity, conferencing, online and offline presentations, board portal).
- Increase data management capacity as a tool for decision making (i.e., donor and grant management software, ColoradoGives and other program analytics and reports).
- Continuously improve processes to support donor-advised fund and field of interest fundraising.
- Consistently implement the graphic elements of the Community First Foundation brand into all areas of the organization and reinforce brand messaging among staff and board through education and training.
- Continuously evaluate and improve the vendor and contract management system.
- Maintain tools to identify and manage risk within the Foundation.

### Prudent Financial Stewardship

**Continuously evaluate, revise and align the Foundation’s financial and investment systems and processes as needed to ensure integrity and prudence.**

- Continuously evaluate the investment strategies relating to the Foundation’s unrestricted assets and modify as needed to remain prudent.
- Continuously evaluate the investment strategies and processes relating to the Foundation’s restricted assets and modify as needed to be both competitive and prudent.
- Continuously evaluate strategies for community impact return on investments.
- Maintain National Standards certification as official confirmation of our sound policies, responsible practices and credibility.
- Maintain public charity status.
- Comply with the Uniform Prudent Management of Institutional Funds Act.

### HONOR OUR HERITAGE AND POWER COMMUNITY IN JEFFERSON COUNTY



**Assumption.** We have a history and relationship with Jefferson County that is different from and deeper than our relationships with the other six metro area counties. Moreover, there is no other community foundation having this special relationship. This, coupled with the Lutheran Legacy Fund, creates opportunities for impact in Jefferson County that we cannot expect to have in the other counties.

**Be a trusted and value-added partner in advancing healthy communities in Jefferson County.**

- Support collective impact and community-based efforts to improve the social determinants of health in Jefferson County.
- Engage and seek guidance from the Lutheran Legacy Fund Advisory Board regarding community needs and the opportunities to address those needs.





- Offer quality free-of-charge meeting space in Jefferson County to nonprofit organizations. *Note: this initiative addresses two strategic priorities -- Honor our Heritage and Power Community in Jefferson County and Power Community by Strengthening Nonprofits.*

### POWER COMMUNITY BY STRENGTHENING NONPROFITS



**Assumption.** The more vibrant and resilient a community's nonprofits, the more effective those nonprofits will be in serving the community and contributing to its strength.

#### **Develop an effective and inclusive nonprofit workforce.**

- Partner with key stakeholders to develop educational opportunities for the existing and future nonprofit workforce that (1) integrate academic and experiential/practice-based learning, and (2) achieve greater inclusiveness and diversity within the nonprofit workforce.
- Strengthen the workforce of nonprofits that are key to the success of this Strategic Plan.

#### **Strengthen strategic nonprofit partners and networks by helping them secure the tools, knowledge, and capacities needed to achieve their missions.**

- Increase the capacity of strategic nonprofit partners in the areas of Governance & Policy, Finances, Communication, Staffing, and Operations.
- Integrate capacity building into other strategic areas of foundation grantmaking.
- Provide tools and training to nonprofit organizations so they can operate effectively.

#### **Build the nonprofit sector's voice and efficacy.**

- Promote the importance of the nonprofit sector and ensure that the interests of the sector are considered in public policymaking.



## POWER COMMUNITY BY INCREASING GENEROSITY



**Assumption.** The act of charitable giving brings benefit to both the recipient and the donor. By increasing generosity, we can increase resources for nonprofits and increase community engagement as well as individual satisfaction and a sense of shared purpose.

### Enhance and expand ColoradoGives.

- Continuously improve the ColoradoGives experience for the grantees and the donors and improve the donor and grantee feedback loops.
- Increase the fundraising capacity of the site, including e-gift cards, fundraising pages, and recurring donations.
- Monitor giving trends and invest in technology and innovations to keep the site secure, fresh and state of the art.
- Continuously improve KidsforColoradoGives.org to inspire the next generation of givers.

### Increase donor-advised funds and develop other asset-building strategies.

- Increase the number and size of donor-advised funds.
- Continuously improve the experience of donors and fund advisors, and improve donor feedback loops.
- Continuously identify and evaluate new methods and opportunities to engage donors and their families in charitable giving.
- Develop and implement strategies to engage and increase referrals from financial advisors.

### Increase agency endowments as an asset-building strategy.

- Add new endowment partners and increase the size of existing endowments. *Note: this initiative addresses two strategic priorities – Strengthening Nonprofits and Increasing Generosity.*
- Track and maintain endowment partner satisfaction.



**Increase corporate engagement by making charitable giving easier and more meaningful for businesses and their employees.**

- Identify opportunities to leverage ColoradoGives.org for employers (e.g., matching gifts, corporate gift cards, workplace participation in Colorado Gives Day) and implement, if indicated.
- Continuously seek and evaluate other opportunities to increase engagement of businesses and their employees and implement, if indicated.

**POWER COMMUNITY BY PROMOTING MENTAL WELLNESS**

**Assumption.** The mental health field is broad, complex and fragmented. Although measuring outcomes can be difficult, opportunities for innovative and impactful work exist.

**Pursue a three-pronged approach to promoting mental wellness.**



**Invest in early intervention programs that cultivate resilience and prevent the onset of mental health problems using population based approaches.**

- Promote early childhood mental wellness and resilience.  
— Work within the system-building framework of Project LAUNCH to identify and support existing evidence-based mental wellness programs and promising approaches that improve the social/emotional development of children prenatal to age five.



### **Improve the systems supporting mental wellness.**

- Monitor and support legislation, policies, and other efforts that improve the systems supporting mental wellness, such as payment reform, public support and integration with primary care, data collection and analysis.
- Identify and support “proof of concept” programs addressing deficiencies in the systems supporting mental wellness.

### **Change the public perception of mental health and mental illness.**

- Support promotion of mental health parity (mental health/illness being perceived and regarded similar to physical health/illness).

### **Continue to increase our knowledge and deepen our expertise.**

- Deepen our expertise in the field and our exposure to funding opportunities.
- Seek collaborative co-funding opportunities that provide a platform to learn from experts and exchange ideas with our peers.
- Identify and participate in community organizations and activities focused on early childhood and mental health.

### **Develop and Implement a strategic learning and evaluation framework.**

- Develop impact indicators and supporting data collection processes.

## UNIQUE HIGH-LEVERAGE OPPORTUNITIES



**Assumption.** Because our resources are limited, we will not seek statewide opportunities except in strategic situations where we can build on existing capacity and achieve significant benefit at incremental cost.

### Seven County Denver metropolitan area strategies may be expanded beyond the seven counties if:

- The core capacities needed to support the strategy are in place.
- The incremental cost of expanding the strategy beyond the seven county area is small relative to the expected benefit to Coloradans outside the seven county area.

For example, programs like ColoradoGives.org and services such as nonprofit endowment stewardship can be offered outside the seven county area with significant benefit but without significant additional cost.

