

MIDLAND AREA COMMUNITY FOUNDATION STRATEGIC PLANNING ELEMENTS

ACTIVE GRANTMAKING

RESPONDING TO COMMUNITY NEEDS VIA GRANTS AND SCHOLARSHIPS (BOTH REACTIVE & PROACTIVE)

PRIMARY METRICS

1) Percent of spendable endowed dollars given out

By year-end 2013 give away at least **XYZ%** of spendable endowed dollars to approved project annually (includes both reactive and proactive projects).

Note: From a base of 65% in 2007

2) Percent of non-endowed funds (i.e. the number of) making grants from

By year-end 2013 make grants from **ABC%** of non-endowed funds (not \$\$\$)

Note: From a base of 51% in 2007 (i.e. 33 of 65 funds)

3) Number community needs identified

Proactively identify community needs - **ONGOING**

GROWING FUNDS

DEVELOPING DONORS AND THE NUMBER & AMOUNT OF ENDOWMENTS, PROJECT FUNDS, DESIGNATED FUNDS, INVESTMENTS, DONOR ADVISED FUNDS, SCHOLARSHIPS, PLANNED GIVING, ETC.

PRIMARY METRICS

1) Total number of fund dollars

By year-end 2013 grow total fund dollars to \$100 million

Notes: 1) From a base of \$55 million in 2008

2) Targeting CPI plus 5.5% from net investment return and the remainder from new money

Supporting Objective: By 2011 secure matching gifts for educational purposes from area employers and others.

2) Market penetration (i.e. no. of participating households)

By year-end 2013 grow the number of participating households to an average of 5% in Midland County and 1% in Gladwin County.

Notes: 1) From a base of 3.62% of 31,769 households in 2007 in Midland County

2) From a base of 0.51% of 10,561 households in Gladwin County

3) 2007 measure are based on 2000 census data

By year-end 2010 create and implement a *Donor Development Program* to segment donor groups (new & existing) complete with both communications and giving plans for each group.

EFFECTIVE COLLABORATION

PARTNERING WITH COMMUNITY AGENCIES, GOVERNMENTS, OTHER FOUNDATIONS, EDUCATION, AND COMMUNITY LEADERS ON ISSUES, PROJECTS AND EVENTS,

PRIMARY METRICS

1) Number of partners and collaborations

Be recognized as a community foundation leading, collaborating or participating in major community-based projects.

ONGOING

2) Effectiveness of collaborations (via survey)

Build and maintain strong, open relationships with other area foundations, governments, and other non-profits.

ONGOING

FOSTERING PHILANTHROPIC LEADERSHIP

BUILDING A CULTURE OF GIVING THROUGH LEADERSHIP DEVELOPMENT, EDUCATION, YOUTH ACTION COUNCIL, ETC.

PRIMARY METRICS

1) The next generation of leaders

By year-end 2011 develop and implement a plan to identify, engage, develop, and nurture emerging leaders across all donors.

Take advantage of every opportunity to help the community better understand philanthropy

(i.e. philanthropy is a form of giving that everyone can do) - **ONGOING**

EFFICIENT AND EFFECTIVE OPERATIONS & GOVERNANCE

ENSURING WELL-ORGANIZED, PROFESSIONAL AND RESPONSIBLE STEWARDSHIP: INCLUDES HUMAN RESOURCES MARKETING, FACILITIES, TECHNOLOGY, FINANCE, COMPLIANCE, ETC.

PRIMARY METRICS

1) Managing to budget

Ensure that all fees are fair, equitable and competitive - **ONGOING**

2) Appropriate Board make up & participation

Attract, develop and retain appropriate staff (direct and indirect) commensurate with the strategic direction - **ONGOING**

Supporting Objective: Create and manage Career Development Plans for all paid staff - **ONGOING**

Supporting Objective: Develop and implement necessary Human Resource policies - **ONGOING**

3) Maintaining COF accreditation

Maintain an appropriately diverse, vibrant and engaged Board of Trustees - **ONGOING**