

# **Leading, Linking & Communicating**

*2010 to 2015 Strategic Plan  
for the  
Community Foundation of Greater Fort Wayne*

## Community Foundation of Greater Fort Wayne Strategic Planning Report

### I. Where We Came From: The Context for Planning

Since its founding in 1956, the Community Foundation of Greater Fort Wayne has had a mission of serving the Allen County community by improving the quality of life for all of our citizens.

In the last ten years, nearly 7,000 gifts have been received totaling more than \$86 million. At the same time, more than 1,100 charitable organizations and hundreds of students have been awarded nearly \$80 million in grants and scholarships. Along the way, we have earned the trust of the community as a steward of endowed resources and a partner with other charities in helping them achieve their missions.

The Strategic Planning Committee of the Community Foundation<sup>1</sup> found much to be proud of in their planning sessions. The new Steinger Center provides a venue for our activities and helps build our visibility and credibility. Our primary functions of asset development, stewardship, and grantmaking were consistently praised for their professionalism and effectiveness. The awarding of the TOpS 2015 grant of \$20 million from the Lilly Endowment for economic development goes a long way towards helping us improve the quality of life in our community.

But the leaders on the Strategic Planning Committee of the Community Foundation see the organization as more than a charitable conduit. It's time for us to build on the strengths we have created and the trust we have garnered to move into new areas which will take the Community Foundation to the next level in our organizational development.

This strategic plan is designed to propel us forward in several areas. We will help **lead** Allen County into the future both as a community leader and with an effective, outcomes-based grantmaking program. At the same time, we will **link** our funding and the funding of other donors with causes that matter. The process will be brought together with more effective **communications** of what we do and how we can make our Fort Wayne and Allen County a better place to live.

It is because of these themes that we call our plan LLC: Leading, Linking and Communicating.

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<sup>1</sup> Members of the Strategic Planning Committee included Andy Brooks, Kathy Callen, Carol Durham, Jane Gerardot, Greg Johnson, Tom Kimbrough, Tracy Shellabarger (Board Chair), and Todd Stephenson. Staff involved included: David Bennett, Heidi Ludwig, Christine Meek, and Beth Regedanz.

## II. Where We Want to Go: Mission, Vision, and Values

### Mission Statement

Like all community foundations, the Community Foundation of Greater Fort Wayne operates within a broad set of parameters in doing its work. While the “three-legged stool” of *asset development*, *grantmaking*, and *stewardship* are common to all community foundations, each individual foundation decides for itself how to best execute the three functions in a way that meets the needs of the local community.

The Community Foundation of Greater Fort Wayne has operated for many years with the following mission statement:

*The mission of the Community Foundation of Greater Fort Wayne Inc. is to build public giving partnerships that effectively connect donors with nonprofit organizations and community projects to produce a brighter future for all people in Allen County.*

The Community Foundation works toward this mission in the following ways:

- *As a grantmaker, ensuring effective grants that meet donors’ charitable interests and address the community’s changing needs*
- *As a steward, providing professional investment and financial services that preserve and enlarge a community pool of charitable funds*
- *As a resource developer, attracting permanent assets that supply flexible community resources for today and the future*
- *As a philanthropic advisor, offering information and advice that helps donors and nonprofit agencies achieve their objectives and improve the community*
- *As a community leader, stimulating community dialogue and decision-making that help define common goals and solve crucial problems*

The Community Foundation of Greater Fort Wayne affirms the core components of its current mission, stated as a grantmaker, steward of assets, resource developer, philanthropic advisor and community leader. But during our planning discussions, the committee felt that this statement no longer accurately captures our priorities at this stage in our growth. More specifically, the mission statement lacks the notion of community engagement on the part of the Community Foundation. It implies that the Community Foundation is transactional, not relational. It also conveys that the Community Foundation merely connects effort with funding without adding anything of value to the exchange.

The following is proposed as a new mission statement:

*The mission of the Community Foundation of Greater Fort Wayne is to serve as a community leader to improve the quality of life by building permanent endowments, promoting effective grantmaking, fostering philanthropy, stimulating community dialogue and helping donors achieve their charitable goals.*

This mission statement has the advantage of focusing on our core strategies: asset development, grantmaking, and community leadership. In addition, it expressly uses the term “endowment”, which is lacking from our current mission statement. Finally, an additional advantage is its brevity.

### *Vision of Organizational Success*

The first step in realizing the potential for the Community Foundation to fulfill its mission is to continue those things that currently are working well. The Strategic Planning Committee identified the following as worthy of continuation:

*Stewardship* – Managing, protecting and reporting our assets;

*Asset Development* – Working with current and potential donors to fulfill donor intent;

*Grantmaking* – Using engaged volunteers to promote effective grantmaking

The importance of these functions cannot be overemphasized, as they are critical to the functioning of any well-run community foundation.

Yet to take our organization to the next level of its development, the Strategic Planning Committee identified the following visions:

***Expand our community leadership role*** – Given our robust financial position, access to information and strong reputation, the Community Foundation should expand its role as a community leader, stimulating community dialogue and supporting informed decision-making.

***Establish a more intentional grant process, linking funding priorities to outcomes*** – While recognizing the limitations of our resources relative to the size of the nonprofit sector, it’s time for the Community Foundation to more aggressively identify and embrace the outcomes sought by our grantees and to encourage collaboration.

***Grow our Assets*** – While we have realized impressive asset growth in the last two decades, we will aspire to achieve community-wide goals by more aggressively seeking resources to address pressing needs.

***Increase awareness about the Community Foundation among key stakeholders*** – Despite all of our recent successes, it is our perception that the community’s understanding of our mission and operations is lower than we would like. Therefore, we will enhance our broad-based communications plan consistent with our strategic goals.

## Statement of Values

As the designation of a public charity implies, the Community Foundation of Greater Fort Wayne exists because of public support. We take very seriously our obligation to earn the public's trust. The Community Foundation is accountable to the public for our operations. To that end, we have implemented numerous internal controls that provide assurance to our donors, grantseekers and the community-at-large that we will protect the assets entrusted to our care, make fair and unbiased, intentional decisions, and be a trusted organization for philanthropic endeavors.

- A **diverse, community-minded board of directors** and other volunteers who receive training to understand their responsibilities in providing oversight of the operations of the Community Foundation.
- An **engaged audit committee**, which hires our independent auditor and monitors the Community Foundation's internal controls.
- A **strong investment committee**, which is responsible for setting the Investment Policy of the Community Foundation and monitoring the performance of our investment managers.
- A **fair and unbiased grant review committee**, which is equally accessible by all nonprofits in our community.
- The **open and transparent philosophy** of the Community Foundation, which provides on our Web site a copy of our audit, tax return (Form 990), investment performance results, and a list of grants awarded.
- An **effective Conflict of Interest Policy**, which requires anyone at the Community Foundation in a decision-making role—including board members, volunteers, and staff—to abide by our Conflict of Interest Policy.
- A **strict Privacy Policy**, which prohibits the Community Foundation from sharing information on donors or potential donors with anyone outside our organization.

### III. How We Get There: The Strategic Framework

The activities of the Community Foundation will be guided by four major *strategic priorities* identified by the board and staff as being crucial to the realization of the Community Foundation's vision of organizational success. To fully enact each strategic priority, the Community Foundation must address a series of *action steps*, defined here as a task or plan designed to help achieve a strategic priority. The strategic priorities and the accompanying critical issues are presented below.

In some cases, specific options and/or criteria for decision-making were identified through the planning process.

**Strategic Priority #1:** Expand our community leadership role.

- **Action Step:** Encourage collaboration
- **Action Step:** Increase the culture of philanthropy
- **Action Step:** Stimulate community dialogue
- **Action Step:** Provide unbiased information on philanthropic issues

**Strategic Priority #2:** Establish a more intentional grant process, linking funding priorities to needs and outcomes

- **Action Step:** Develop the context for intentional grantmaking decisions
- **Action Step:** Focus grantmaking on capacity building to enhance effective and efficient nonprofits
- **Action Step:** Link philanthropic resources to community needs

**Strategic Priority #3:** Grow our Assets

- **Action Step:** Seek out additional gifts from current donors and gifts from new donors
- **Action Step:** Ensure good stewardship
- **Action Step:** While donor intent/restrictions will be honored, we will highlight as an option a gift to an unrestricted fund

**Strategic Priority #4:** Increase the knowledge of the Community Foundation among key stakeholders

- **Action Step:** Expand our communications plan to focus on key stakeholders
- **Action Step:** Promote the Community Foundation story
- **Action Step:** Test the impact of the communications efforts