



Community Foundation for Monterey County 2015 Strategic Plan

Vision, Mission and Values

Vision

Healthy, safe, vibrant communities

Mission

To inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County

Values

- We **advance positive change** through grant making, community engagement and collaboration.
- We **build a legacy for future generations** through responsible stewardship of the resources entrusted to us.
- We **operate with the highest standards** of integrity, ethics and accountability.
- We **embrace inclusivity** and diversity.
- We **commit to fairness** and respect for the dignity of all people.
- We **are open and honest** with our philanthropic partners, grantees and the community.
- We **strive for excellence** in all that we do.

PLANNING ASSUMPTIONS

The Community Foundation for Monterey County (CFMC) continues to experience significant, positive change. As a trusted steward of assets and donor intent, a valued partner of nonprofits and a thoughtful leader on community issues, the CFMC can build on its successes, and strive to provide deeper impact to a greater part of Monterey County.

The CFMC must:

- Remain committed to a truly countywide reach in all aspects of its operations.
- Implement a focused grantmaking strategy that will continually strive to achieve greater impact.
- Proactively seek philanthropic partners for focused investments on shared priorities. Philanthropic partners may be donor advisors, third-party funders, or recipients of the CFMC's private foundation services.
- Elevate its role as a convener, partner and community leader.
- Implement a strong asset development plan in order to grow the resources with which to address pressing community needs and support a vigorous, focused grantmaking program.
- Remain committed to building capacity of our nonprofit partners.
- Enhance services and support to fund holders to create higher philanthropic impact.
- Stay apace of changing communications strategies to elevate community awareness by telling its story to a wider audience.
- Be a strong steward of its assets.
- Be a responsible steward of the environment.



GOALS

Goal One: Community Impact

Invest in developing healthy, safe and vibrant communities across Monterey County.

Goal Two: Philanthropic Leadership

Inspire and facilitate philanthropy throughout Monterey County.

Goal Three: Community Leadership

Recognize opportunities for facilitation of solutions to community issues.

Goal Four: Organizational Excellence

Optimize performance and stewardship for maximum impact.

Goal One: Community Impact
Invest in developing healthy, safe and vibrant communities
across Monterey County.

The Community Foundation for Monterey County has greatly evolved its grantmaking through the development of the Community Impact program and closely working with donor advisors. The CFMC seeks to implement grant programs that, while broad enough to address Monterey County's most pressing needs, have focus and result in tangible and demonstrable impact. All grant programs should seek to align with *"investing in healthy, safe and vibrant communities across Monterey County."* Goal one will be driven by the following four statements.

- 1. Proactively be a partner and catalyst for addressing community challenges.**
- 2. Focus grantmaking toward strategic results.**
- 3. Work closely with donor advisors to align their interests with community need.**
- 4. Strengthen nonprofit sector excellence.**

Goal Two: Philanthropic Leadership

Inspire and facilitate philanthropy throughout Monterey County.

The Community Foundation for Monterey County has a strong asset base, and an enviable percentage of endowed and/or discretionary assets. The CFMC's commitment to building endowment funds, primarily through planned gifts, has never waned. However, if so desired, more emphasis can be placed on building discretionary assets (unrestricted/field of interest). The gift life cycle of creating these funds through estate planning is very long and requires tremendous patience.

The CFMC's commitment to stronger relationships with donor advisors is producing remarkable results. We must continue to build on this success. We must adhere to a resource development plan that actively engages and updates the professional advisor community, and always offer philanthropic value to individuals, families, corporations and private foundations.

Diversity in Monterey County takes many forms: geography, ethnicity, gender, philanthropic interests. The CFMC must be aware of the ever-changing nature of Monterey County and developing relationships in all our communities.

All resource development efforts should celebrate the power of philanthropy, and reinforce a brand that a strong culture of philanthropy resides within the CFMC. Goal two will be driven by the following five statements:

- 1. Educate the public about philanthropy.**
- 2. Grow CFMC's philanthropic assets.**
- 3. Continue to enhance fund holder philanthropy.**
- 4. Seek and align with funding partners to realize greater community impacts.**
- 5. Engage a more diverse philanthropic donor base.**

Goal Three: Community Leadership
Recognize opportunities for facilitation of solutions to community issues.

The Community Foundation for Monterey County is a recognized leader in the nonprofit sector and community overall. As the CFMC has increased its transparency, reached out to diverse audiences across the county, enhanced the work and profile of the Center for Nonprofit Excellence, and developed stronger partnerships with agencies and regional funders, its role as a leader has become more important. In many ways, the CFMC has been engaged in leadership work for many years. Community leadership requires tremendous diplomacy, marked by a desire to facilitate positive outcomes rather than work toward a pre-conceived CFMC solution. Goal three will be driven by the following four statements.

- 1. Be aware of emerging circumstances and issues for which the CFMC can be a positive player in finding community solutions.**
- 2. Respond proactively to emergencies, disasters, civic unrest, and other circumstances in which the staff and board of directors feel the CFMC can play a positive role.**
- 3. Grow the CFMC's profile in advocacy when such activity can create a strong environment for the CFMC to prosper, or support initiatives that align with the CFMC's core values. This may be accomplished through participation in the League of California Community Foundations advocacy work, working with the Council on Foundations or other national lobbying groups, partnering with local organizations or, when appropriate, developing our own initiatives.**
- 4. Utilize CFMC assets for community impact beyond grantmaking.**

Goal Four: Organizational Excellence
Optimize performance and stewardship for maximum effectiveness.

The Community Foundation for Monterey County takes great pride in being an exceptional organization. This requires a commitment to excellence and constant reappraisal of our systems. The CFMC is expanding and becoming more complex. Our operations and organizational structure (including governance) must stay ahead of these changing circumstances. The CFMC is known for strong asset management. Continuing stewardship is key to having resources for granting and maintaining community confidence. Goal four will be driven by the following five statements:

- 1. Continue to invest in infrastructure (human, financial and technological) improvements aligned with CFMC's goals.**
- 2. Continue to elevate CFMC visibility countywide; tell our story more effectively.**
- 3. Maintain a strong, innovative, diverse board of directors and staff that reflect Monterey County.**
- 4. Be a responsible steward of CFMC assets.**
- 5. Operate in an environmentally responsible way.**