



Community Foundation for Monterey County Strategic Plan 2020

CFMC Vision, Mission and Values

Vision

Healthy, safe, vibrant communities

Mission Statement

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

Values

- We **advance positive change** through grantmaking, 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 diversity, equity and inclusion**.
- 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 evolve in conjunction with our changing society and expanding best practices in our field. As a community leader, philanthropic partner, trusted steward of assets and donor intent, and a valued champion of nonprofits, the CFMC should build on its successes, and strive to provide deeper impact to all of Monterey County.

The CFMC must:

- Remain committed to a truly countywide delivery on its mission.
- Continue in its unique role as a trusted convener, partner and community leader.
- Have the board of directors and staff aligned with respect to vision, values and culture.
- Implement focused, yet creative, grant making that will continually strive to create greater impact.
- Proactively seek philanthropic partners for impactful community investments on shared priorities.
- Implement a strong asset development plan in order to grow the resources with which to address pressing community needs now and in the future.
- Remain committed to building capacity and new leaders for our nonprofit partners.
- Enhance fund holder education, support and services to create higher philanthropic impact.
- Continually reevaluate its structure so staff works seamlessly across departments and maximizes skill sets for increased mission delivery.
- Embrace best practices as they evolve in the community foundation field.
- Stay abreast of changing communications strategies to elevate community awareness by effectively telling its story to a wider audience.
- Be a strong steward of its financial assets.
- Be a steward of donor intent.
- Be a responsible steward of the environment.
- Operate with accountability to diversity, equity and inclusion.
- Be a partner in seeking a just and equitable society.



GOALS

Goal One: Community Impact

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

Goal Two: Philanthropic Leadership

Inspire and facilitate philanthropy throughout Monterey County.

Goal Three: Community Leadership

Recognize and act upon opportunities for facilitation of solutions to community issues.

Goal Four: Organizational Excellence

Optimize performance and stewardship for maximum impact.

Goal One: Community Impact

Deploy charitable and intellectual capital towards healthy, safe and vibrant communities across Monterey County.

Good grant making is fundamentally the effective deployment of charitable assets. Through the ever-evolving Community Impact program, the marked increase in scholarship funds and closely working with donor advisors, the CMFC's grant making invests in solutions to Monterey County's greatest needs. The CFMC remains committed to developing and implementing grant programs that have focus and result in tangible and demonstrable impact, utilizing creativity and an entrepreneurial orientation. All grant programs will align with investing in ***Healthy, Safe, Vibrant Communities*** across Monterey County.

Goal one will be driven by the following five statements:

- 1. Initiate, partner and lead in addressing and bringing resources to community challenges.**
- 2. Seek efficiencies in discretionary grant programs that allow for expanded utilization of program staff in all grant activities, community initiatives and needs assessments.**
- 3. Work closely with donor advisors to align their interests with community need.**
- 4. Strengthen nonprofit sector excellence.**
- 5. Focus on opportunity/achievement gaps to increase equity in Monterey County.**

Goal Two: Philanthropic Leadership
Inspire and facilitate philanthropy for equitable outcomes throughout Monterey County.

The Community Foundation for Monterey County has a growing asset base and an enviable percentage of endowed and/or discretionary assets. The CFMC's commitment to building endowed funds, primarily through planned gifts, has never waned. Greater, lasting impact can be achieved through gifts that name the Fund for Monterey County (unrestricted and field of interest assets). The gift life cycle of creating these funds through estate planning requires tremendous patience.

The CFMC's commitment to stronger relationships with donor advisors is producing greater impact. We must continue to build on this success and 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, including geography, ethnicity, gender, and philanthropic interests. The CFMC must be aware of the ever-changing nature of Monterey County and the importance of developing lasting and sincere relationships while promoting philanthropy to all our communities.

All resource development efforts should celebrate the power of philanthropy and reinforce that a strong culture of philanthropy in Monterey County creates lasting, positive impacts.

Goal two will be driven by the following six statements:

- 1. Seek and align funding partners, both internal and external, to realize greater community impacts and a more just and equitable Monterey County.**

- 2. Educate the public about philanthropy and its impacts. Engage professional advisors in a thoughtful and strategic way.**



- 3. Grow discretionary assets (Fund for Monterey County) in order to resource the CFMC's ability to make targeted investments and respond to changing needs over time.**

- 4. Enhance fund holder philanthropy through responsive service and donor education; continue to seek greater alignment between donor advised grant making and prioritized need.**

- 5. Engage a more diverse philanthropic donor base.**

- 6. Elevate CFMC visibility countywide; tell our story more effectively to targeted and general audiences.**

Goal Three: Community Leadership

Utilize CFMC's position as a trusted leader to facilitate solutions to community issues.

The Community Foundation for Monterey County is a recognized leader. As the CFMC 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, many sectors look to the foundation as an honest broker on difficult issues. Community leadership requires diplomacy, marked by a desire to achieve positive outcomes rather than work toward pre-conceived CFMC solutions.

Goal three will be driven by the following five statements.

- 1. Be aware of emerging circumstances and issues for which the CFMC can play a positive role in finding community solutions.**
- 2. Utilize our voice for a just and equitable society.**
- 3. Prepare for and respond proactively to emergencies, disasters, civic unrest, and other circumstances in which the staff and board of directors feel the CFMC can use its expertise in gathering and dispersing resources or offering voice.**
- 4. Utilize advocacy as a tool to 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.**
- 5. Continue to seek opportunities to deploy CFMC financial assets for community impact beyond grant making.**

Goal Four: Organizational Excellence

Optimize performance and stewardship for maximum effectiveness and continuing trust.

The CFMC must be an exceptional organization. It is not only our standard, but it is expected by donors, grantees and the community. This requires a commitment to excellence and constant reappraisal of our systems. Our operations and organizational structure (including governance) must stay on the cusp of evolving best practices, whether in technology, internal systems, governance, or staffing.

Organizational excellence informs our ability to be effective grant makers, stewards of trust and assets and be nimble in the face of changing community need.

Goal four will be driven by the following six statements:

- 1. Continue to identify and invest in scalable infrastructure (people, financial and technological) improvements aligned with CFMC's goals.**
- 2. Maintain an inclusive, engaged and innovative board of directors and staff that reflect a diverse Monterey County.**
- 3. Foster an organizational culture with which people (donors, board members, staff, volunteers) want to align.**
- 4. Be driven by and transparent about the CFMC's mission, vision and values.**
- 5. Be a strong steward of CFMC financial assets and donor intent.**
- 6. Operate in an environmentally responsible way.**