



The Community Foundation  
FOR GREATER ATLANTA

## **2013 through 2015 Philanthropic Framework Guiding Document**

### **Purpose of the Philanthropic Framework**

The Philanthropic Framework is The Community Foundation's strategic *and* tactical plan. It describes where The Community Foundation is aiming to go over the next three years and how it plans to get there. The Philanthropic Framework is guided by our vision, mission and guiding principles, and comprised of our goals, strategies, metrics and our tactical plan. The entire Philanthropic Framework is reviewed, and updated every three years by the Board and Senior Staff of the Foundation. The Foundation's strategies are reviewed and updated every three years by Senior Staff and the Board. And reviews and updates of the tactics and development of in-depth action plans for the tactics are completed throughout each year in collaborative inter-departmental planning processes.

### **Vision**

The vision outlines what the Community Foundation wants to be. The Community Foundation's vision is:

To be the most trusted resource for growing philanthropy to improve communities throughout the Atlanta region.

### **Mission**

The mission defines the fundamental purpose of The Community Foundation as an organization. The Community Foundation's mission is:

The Community Foundation for Greater Atlanta strengthens our region by providing quality services to donors and innovative leadership on community issues.

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### **Guiding Principles**

The guiding principles of The Community Foundation are the shared beliefs of the stakeholders of the organization, and drive the organization's culture and priorities. The Community Foundation's guiding principles are:

- We are a regional institution; therefore we understand and actively support communities throughout the 23 counties.
- We value working with others; therefore we partner with people and institutions to strengthen our communities.
- We value learning; therefore we dedicate time to research, discuss, study and reflect upon the most proven and promising practices and reports in our field.
- We believe in the power of individuals to build community will; therefore we nurture and support effective leadership.
- We value a strong nonprofit sector; therefore we support nonprofits to do innovative, impactful work.
- We value quality service; therefore we openly listen and respond to our constituents with a readiness to adjust our approach.
- We are an organization that values shared contributions; therefore we support an environment that encourages diversity of thought, teamwork, ethical conduct, transparency and trust.
- We value diversity and inclusion; therefore we honor the diverse needs, strengths, voices and backgrounds of all individuals in our regional community.

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### Goals

The goals of The Community Foundation are what the organization MUST DO to achieve its mission and vision. The Community Foundation currently has four goals:

- **Engage philanthropists** - As philanthropists, people invest resources—financial, human and intellectual—individually and collectively to improve the well-being of our region. Philanthropists are knowledgeable and passionate about the issues affecting our community and the institutions addressing those issues.
- **Strengthen the region's nonprofits** - A strong nonprofit region is a collaborative one made up of organizations that effectively manage operations and high-performing programs based on community need. This requires knowledgeable and capable staff, strong leadership, value for innovation, a clear vision and a plan.
- **Advance public will** - Individuals and institutions in the Atlanta region understand that the well-being of each community member is connected to that of every other. Community members address critical issues through accessible and collaborative debate, discussion, informed decision-making and targeted advocacy focused on public policy.
- **Practice organizational excellence** - The Community Foundation must build internal strength to have external community impact. This means recognizing and maximizing our market growth potential; having a solid, viable business model and thoughtful planning and review processes; and being a trusted steward of long-term charitable resources for our region.

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### Strategies

Strategies are the major patterns of activities for how The Community Foundation achieves its goals. Strategies are reviewed and updated every three years by Senior Staff.

*To engage philanthropists, The Community Foundation will:*

- Invest in and support enhanced donor service delivery and engagement
- Implement creative and sustainable engagement opportunities to cultivate and convert prospective donors to confirmed donors

*To strengthen region's nonprofits, The Community Foundation will:*

- Build the capacity of nonprofit organizations to fulfill their mission
- Measure the collective effectiveness and impact of programs and initiatives

*To advance public will, The Community Foundation will:*

- Facilitate advocacy and partnerships of funders, nonprofits, and resident groups throughout the region
- Facilitate networks of people to work together to address critical regional needs through leadership, grantmaking, education and innovative ideas
- Develop Community Development portfolio to organize our intellectual, social and financial capital to influence decisions and resources to benefit our regional communities

*To practice organizational excellence, The Community Foundation will:*

- Create an organizational infrastructure and processes for effective and measurable management of the organization and its products and services
- Create a culture and environment that fosters excellence, leadership, collaboration, diversity and inclusion, innovation, and learning
- Create an environment and infrastructure where knowledge is efficiently, accurately and consistently captured, shared and utilized
- Build Awareness of our vision and our value among target audiences comprised of nonprofits, donors, prospective donors, staff, volunteers and stakeholders
- Become more regionally focused in our work

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### **Metrics**

The Community Foundation's metrics gauge quantifiable components of the organization's performance. The Community Foundation's metrics are comprised of community indicators and performance measures. Community indicators are updated every three years and the performance measures are updated and reviewed annually by the full staff.

#### **Community Indicators**

The Community Foundation is one partner in achieving a stronger, Greater Atlanta region. Together with other donors, nonprofits, funders and others, we seek to achieve the following in our region:

- Change in number of investments (financial, human and/or intellectual) in nonprofit organizations within the 23-county region
- Change in number of nonprofit organizations with a written strategic plan that measures progress
- Change in number of nonprofits and organized communities engaged in addressing public policies

#### **Organizational Performance Measures**

We will specifically evaluate our own organization's ability to meet the above indicators by measuring, over time, the:

- Change in number of grants across 23 counties
- Change in open-rates of Foundation email communications
- Change in donor and volunteer engagement with the Foundation
- Change in amount of dollars influenced by the Foundation to address community needs
- Change in number and value of grants to nonprofits
- Change in fund assets
- Change in number of activities provided to share information regarding community data and policy issues
- Change in number of opportunities we undertake to facilitate civic engagement within the region
- Change in staff, Board and volunteers who report increased knowledge and skills
- Change in Foundation operating costs
- Change in number of existing funds that received gifts

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### Tactical Plan

The tactical plan contains the tactics employed to address the strategies of the Philanthropic Framework. Tactics are programs, projects and initiatives, and are flexible and updated throughout each year along with the development of the annual budget and in-depth action plans. These planning processes are collaborative and inter-departmental in nature.

#### **Goal: Engage philanthropists**

**Strategy:** Invest in and support enhanced donor service delivery and engagement

##### Tactics

- *Review and enhance core and special donor engagement programs and tools*
- *Develop and implement strategies to encourage and increase current and planned gifts from current donors*
- *Develop effective strategies for better communicating PS services (what we do) and successes (what we've done) both internally and externally*
- *Provide innovative, alternative community investment opportunities for donors*
- *Provide opportunities for donors to participate in competitive grant review/selection process*
- *Create new Fund Advisor Orientation Handbook*
- *Review and enhance donor services (including gift and grant processes)*

**Strategy:** Implement creative and sustainable engagement opportunities to cultivate and convert prospective donors to confirmed donors

##### Tactics

- *Review, revise and implement new strategies for engaging and stewarding professional advisors*
- *Increase growth in number of new donors through targeted identification and cultivation strategies*
- *Review and revamp Gift Acceptance Policies*
- *Develop and implement strategies and procedures for prospect research and management*
- *Create approach/cultivation strategies to pilot for select diverse donor prospect groups (e.g. ethnic, age, geographic, sexual orientation, religious preference)*
- *Utilize Local Funds to identify prospective donors*

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### **Goal: Strengthen the region's nonprofits**

**Strategy:** Build the capacity of nonprofit organizations to fulfill their mission

#### Tactics

- *Assess and expand Nonprofit Effectiveness topics and formats of workshops/seminars to better meet the current needs of nonprofits*
- *Build on regional data mapping project to include grantmaking*
- *Review and pilot 2-3 cohort activities around operational and/or programmatic issues of importance to nonprofit organizations*
- *Research and develop services and products that will prepare nonprofits for opportunities that promote innovation*
- *Expose nonprofits to regional and national trends and best practices by bringing speakers and other thought leaders to the region.*
- *Develop diversity/inclusion learning opportunities to build nonprofit capacity*

**Strategy:** Measure the collective effectiveness and impact of programs and initiatives

#### Tactics

- *Research options for grant evaluation including identifying 3rd party expertise and funding options*

### **Goal: Advance public will**

**Strategy:** Facilitate advocacy and partnerships of funders, nonprofits, and resident groups throughout the region

#### Tactics

- *Develop a communications plan and programming to educate staff, donors and other stakeholders on topics related to policy and advocacy*
- *Complete environmental scan of regional nonprofit sector's advocacy priorities and activities*
- *Provide funding for resident groups to advocate on critical issues within their communities*
- *Develop a three-year public policy platform, focused on prioritized Foundation issue, via public education grassroots and/or direct lobbying.*
- *Develop leadership project focused on encouraging community leaders to run for public office*

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**Strategy:** Facilitate networks of people to work together to address critical regional needs through leadership, grantmaking, education and innovative ideas

### Tactics

- *Complete a Healthy Belvedere program evaluation and environmental scan that will include a successes, a long term Community Action and sustainability Plan*
- *Ensure the sustainability of Champions for Children*
- *AIDS Partnership: Implement new vision for Georgia's new Strategic Plan for AIDS*
- *Arts Fund: Ensure a thriving arts region by stabilizing and strengthening small and midsized arts and capitalizing high potential arts organizations*
- *Grants to Green: Strengthen the region's nonprofit energy efficiency and overall organizational capacity.*
- *Neighborhood Nexus: Ensure an effective business model to provide community-level information across the region*
- *Neighborhood Fund: Transform grassroots ideas and energy into products and processes that build relationships, change communities, develop leadership and produce lasting results*
- *Develop the One Nation portfolio of programs to complement and enhance the Foundation's community development work*
- *Position Higher Ground to raise awareness and to inspire action on key issues affecting the greater Atlanta community to effect positive change*
- *Develop the Atlanta Wealth Building Institute plan for an Atlanta-based resident-owned and operated industrial-scale green house*
- *AIDS Fund: Prepare and strengthen ASOs for national health care reform impacts*

**Strategy:** Develop Community Development portfolio to organize our intellectual, social and financial capital to influence decisions and resources to benefit our regional communities

### Tactics

- *Implement the Foundation's community development portfolio*



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### **Goal: Practice organizational excellence**

**Strategy:** Create an organizational infrastructure and processes for effective and measurable management of the organization and its products and services

#### Tactics

- *Provide a well diversified, well executed long term program of investment management*
- *Conduct cost-revenue study, make recommendations. Evaluate revenue model of Foundation*
- *Improve property management process*
- *Ensure legal compliance in all areas of HR*
- *Evolve organization's data management structure.*
- *Continue to decrease the time to report audit and 990 information and improve process.*
- *Streamline and automate accounting processes and evaluate month end close*
- *Evaluate organization's physical space and location*
- *Implement HR metrics*
- *F&O Department report card*

**Strategy:** Create a culture and environment that fosters excellence, leadership, collaboration, diversity and inclusion, innovation, and learning

#### Tactics

- *Ensure training budgets are strategic, based on organization needs, and are fair, taking employee, department and overall Foundation needs into account*
- *Ensure equitable compensation process and competitive compensation rates*
- *Evolve process for defining and measuring individual and departmental performance standards and provide professional development opportunities*
- *Develop diversity strategies that help advance the staff's cultural competency and support a diverse work environment that encourages learning*
- *Create code of ethics and update personnel policies*
- *Review of independent contractor process*
- *Enhance employee services and benefits*
- *Review of executive benefits*
- *Deepen Foundation staff knowledge of public process around issues to facilitate agreement on public policy goals and decision making parameters*

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**Strategy:** Create an environment and infrastructure where knowledge is efficiently, accurately and consistently captured, shared and utilized

### Tactics

- *Align Performance Measure with departmental organizational metrics*
- *Determine how we want to use the Community Indicator data to advance Foundation goals and implement appropriate activities*
- *Develop and manage knowledge management agenda*
- *Evaluate budget process and develop more streamlined process for management.*
- *Develop process to identify information the Foundation needs to obtain from the field, organizations, place and issues (FOPI)*

**Strategy:** Build awareness of our vision and our value among target audiences comprised of nonprofits, donors, prospective donors, staff, volunteers and stakeholders

### Tactics

- *Strategic Marketing Plan:*
  - *Implement marketing plan*
  - *Monitor ongoing alignment of messages with current organizational focus*
  - *Empower staff and volunteers to be organizational ambassadors (talking points, elevator speech, etc.)*
  - *Empower staff in select marketing functions (taking photos, web content, writing stories, writing press releases, writing print copy, presentations)*
  - *Develop media relations plan for city and regional media; assess feasibility of phased implementation*
  - *Develop electronic media plan; assess feasibility of phased implementation*
  - *Create select marketing and communications tools (publications, one-sheets, speeches, annual meetings, etc.)*
  - *Create and manage electronic communications (website, Facebook, e-blasts, e-news, videos and photos)*
- *Host event for all volunteers recognizing their contribution to the Foundation's mission and goals.*
- *Create and manage a region-wide philanthropic and civic engagement study*
- *Create an employee handbook that will guide the volunteer lead's experience from recruitment through the end of the volunteer term*

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**Strategy:** Become more regionally focused in our work

### Tactics

- *Conduct additional regional mapping of external counties*
- *Create a Plan for establishing a Regional leadership advisory committee and implement as appropriate*