



Strategic Plan 2014 Work Plan

Let good grow.



What does OCF do?

Let good grow.

- We strengthen the nonprofit community.
- We bring the community together around giving.
- We grow philanthropic resources.

Let good grow.



Strengthen the nonprofit community.

How do we do this?

- Through our Nonprofit Capacity Building program that provides organizational development opportunities to local nonprofits.
- By providing funding and other resources to nonprofits to sustain their work.
- By being an advocate of nonprofit needs.

Let good grow.



Bring the community together around giving.

How do we do this?

- By organizing Omaha Gives!, a community-wide, 24-hour online day of giving for local nonprofits.
- By building an indicator project together with community partners to highlight our area's successes and challenges.

Let good grow.



Grow philanthropic resources.

How do we do this?

- By engaging our donors and finding new ways to serve them.
- By encouraging new individuals, families, and businesses to work with us.
- By strengthening our relationship with the professional advising community.
- By promoting planned "legacy" giving options.

Let good grow.



Build a strong, smart, and connected organization.

How do we do this?

- By strategically hiring and continually investing in staff development.
- By operating under a three year budget plan and maintaining adequate operating reserves.
- By building stronger relationships and engaging with our Board of Directors.

Let good grow.



TEAM: Nonprofit Capacity Building and Strengthening Organizations

Skills needed

- Understanding of best practices in the nonprofit sector
- Objectivity; non-prescriptive; unbiased
- Awareness of the issues facing our service area
- Communications with other grantmakers and funders
- Knowledge of right questions to ask and which information to note

Let good grow.



TEAM: Omaha Gives

Skills needed

- Donor relationship management
- Nonprofit relationship management + nonprofit capacity building
- Finance (credit card processing, grant processing)
- Sponsor recruitment + recognition
- Communications: social media + public relations
- Fun!

Let good grow.



TEAM: Indicator Project and Thought Leadership

Skills needed

- Community engagement
- Local nonprofit knowledge + nonprofit relationships
- Research: national models + local data + evaluation
- Communications: online + print + public relations
- Donor engagement

Let good grow.



TEAM: New Account Development

Skills needed

- Knowledgeable about OCF tools
- Knowledgeable about government regulations
- Connected to professional advisor community
- Respected among nonprofit, donor, advisor community
- High level of self-presentation

Let good grow.



TEAM: Donor Service Delivery and Cultivation

Skills needed

- Affable
- Charismatic
- Well spoken
- Modest
- LISTENER

Let good grow.



TEAM: Board and Resource Alignment

Skills needed

- Diplomacy
- Strategic thinking
- Analytical thinking
- Salesmanship
- Curiosity

Let good grow.



TEAM: Staff Recruitment, Talent Development, and Culture

Skills needed

- Strong commitment to organization
- Awareness of Foundation's needs
- Intuitive
- Lighthearted/fun
- Resourceful

Let good grow.



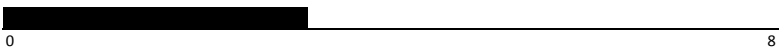
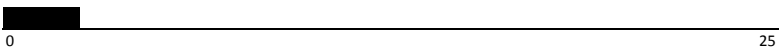

Incentive Compensation Goals

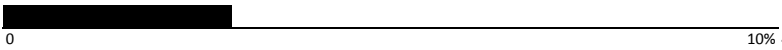
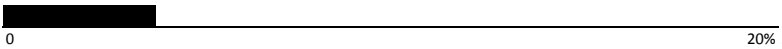


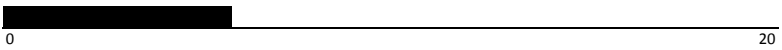
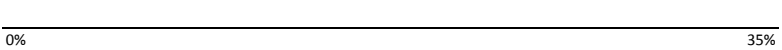
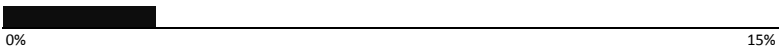
Extra Credit!







- 25% 17,000 Unique individuals participating in Omaha Gives
- 40% 130 Net new donors
- 25% 20 Planned gifts
- 10% Manage the budget to meet the goals of the organization






Let good grow.




Strategic planning teams and related targets





MD NEW ACCOUNT DEVELOPMENT			
Skills needed	<ul style="list-style-type: none"> * Knowledgeable about OCF tools * Knowledgeable about government regulations * Connected to professional advisor community * Respected among nonprofit, donor, advisor community * High level of self-presentation 		
MD	New nonprofit accounts		3
MD	All advisor referrals		16
MD	Referrals from new advisors		10
MD	Account referrals from board members		1
MD	Presentations to civic organizations (board-sourced?)		5
MD	Presentations/speaking engagements by OCF staff		12
MD	Presentations to corporations and executives		
MD	New corporate accounts		5

MD DONOR SERVICE DELIVERY AND CULTIVATION			
Skills needed	<ul style="list-style-type: none"> * Affable * Charismatic * Well spoken * Modest * LISTENER 		
MD	Donor moving from DDD to DAF		1
MD	Meetings with new donors		3
MD	Account referrals from donors		6
MD	NextGen/Family foundation projects		4
MD	Planned gifts		6
KB	Open rate on Donor Connect		
SB	Donors that support LGG		3%

KB OMAHA GIVES	
Skills needed	<ul style="list-style-type: none"> * Donor relationship management * Nonprofit relationship management + nonprofit capacity building * Finance (credit card processing, grant processing) * Sponsor recruitment + recognition * Communications: social media + public relations * Fun!
KB	Nonprofits participating in Omaha Gives 0  500  569!
MD	Corporate promotion partners for Omaha Gives 0  10  22!
SB	Corporate sponsorship in Omaha Gives 0  25%  26%

KB INDICATOR PROJECT AND COMMUNITY THOUGHT LEADERSHIP	
Skills needed	<ul style="list-style-type: none"> * Community engagement * Local nonprofit knowledge + nonprofit relationships * Research: national models + local data + evaluation * Communications: online + print + public relations * Donor engagement
SB	Private partners on indicator project 0  2 PKF, IWF Sherwood Biz Rep?
SB	Public partners on indicator project 0  4 UW, Chamber MAPA, City
SB	Public/private partnerships OCF's services supports 0  2 1 in proc ess
KB	Media mentions and op-eds 0  10  127?

AB NONPROFIT CAPACITY BUILDING AND STRENGTHENING ORGANIZATIONS	
Skills needed	<ul style="list-style-type: none"> * A broad understanding of best practices in the nonprofit sector * Objectivity; non-prescriptive; unbiased * An awareness of the issues facing our service area * Communication with other grantmakers/funders * Knowledge of right questions to ask and the information in which to make note of
AB	Nonprofit capacity building alumni participating in alumni activities 0  75% 50%
AB	Nonprofit capacity building nominations from external leaders 0  25 20
AB	Site visits and nonprofit meetings 0  75 40

SB/MS BOARD/RESOURCE ALIGNMENT	
Skills needed	<ul style="list-style-type: none"> * Diplomacy * Strategic thinking * Analytical thinking * Salesmanship * Curiosity
SB	Aggregate giving by OCF board 
SB	Support from Omaha Gives and LGG from board connections 
SB	Community leadership on OCF board and committees 
SB	Corporate leadership on OCF board and committees 
MS	3-year operating budget FALSE _____ TRUE in process
SB	3-year staffing plan FALSE _____ TRUE in process
MS	Clean audit FALSE _____ TRUE
RS STAFF RECRUITMENT, TALENT DEVELOPMENT, AND CULTURE	
Skills needed	<ul style="list-style-type: none"> * Strong commitment to organization * Awareness of Foundation's needs * Intuitive * Lighthearted/fun * Resourceful
RS	Potential staff talent referred to OCF by board FALSE _____ TRUE