

Connecting our Partners with Purpose

2027 Strat Plan Goals	2026 Goals	Owner	KPIs & Deliverables	Q3 Progress Updates	Q2 Progress Updates	Q1 Progress Updates
GOAL 1: Elevate the donor experience through all stages of engagement with OCF to retain and grow relationships.	Subgoal 1: Refine and assess engagement and stewardship practices, optimizing the use of fundholder segmentation.	Vanessa Kathy Tessa	1. By end of Q2, develop a fundholder/client engagement dashboard that establishes baseline measurements for engagement across multiple dimensions including education, grantmaking (\$ out to community), and fund replenishment (donations into fund). 2. By end of 2026, increase the percentage of active donor accounts* to 75% of total funds. (The 7-year average is 69%.) *Active Donor Accounts are defined as accounts making at least one grant annually. 3. By end of 2026, retain 100% of foundation services clients* and directly impact the growth by 5% of supporting organization, component fund, or philanthropic services revenues. *Foundation Service Clients are defined as clients utilizing OCF for operational and grantmaking services.	1. On Track - Static reporting is available. Real-time reporting is in progress. 2. On Track 3. On Track - the majority of MOU renewals occur in Q4.	1. Off Track 2. On Track 3. On Track - 2 new clients executed MOUs generating \$19,000 in new charitable services revenue. Support for client spring board meetings progressing as planned.	1. On Track - Initial dashboard in testing phase by SWI, DS, and PS which includes grantmaking and donation data. Education tracking in development. 2. On Track - Active donor data loaded into dashboard for proactive team outreach within portfolios. 3. On Track - 2 new clients executed MOUs generating \$19,000 in new charitable services revenue. Support for client spring board meetings progressing as planned.
GOAL 2: Be the preferred partner for advisors seeking philanthropic tools and expertise.	Subgoal 1: Deepen and increase the sophistication of OCF's advisor engagement strategy through advisor segmentation and stewardship. Subgoal 2: Enhance the opportunities and benefits of becoming a member of the CAP network.	Vanessa Kathy	1. By end of Q1, develop an advisor engagement strategic plan. Assess and track through development of a dashboard that establishes baseline measurements for engagement across multiple dimensions including education, collaboration, and referrals. 2. By end of 2026, achieve 80 referrals and develop quality metric to better understand the type and quality of referrals directed to OCF.	1. On Track - End of year communications planning is underway, as well as sponsorships at key advisor conferences, firm presentations, CAP class and alumni engagement, and direct 1 on 1s scheduled by multiple staff. Hosted a successful Women Leading Impact event, multiple firm and industry presentations and community engagement throughout July and August. 2. On Track - 45 referrals as of August 31st.	1. Advisor engagement strategic planning is activated. We have five scheduled presentations, three informal coffee trucks or happy hours, and more in the works all driven by the plan which combines relationships and data. SWIA is attending OCF presentations where there is alignment with client base, and working on engagement strategy follow-up from 2025 year end engagement, and plan for the rest of 2026. 2. We have 25 referrals, noting that a high percentage follow the engagement activities listed above and in the fourth quarter. SWIA has 1 referral (not yet in system, as it came through 5/7)	1. On Track - Developed an advisor engagement strategic plan with input from DS, SWI, PS, Ops, and Marketing. Dashboard in development. <i>Spring engagement includes panel representation at Omaha Estate Planning Council and NE Society of CPAs, partnership with the American College to develop DAF Certificate education module, education planning for FNBO, coffee truck to celebrate end of tax season with accounting partner firms. Advisor toolkits and communications strategy in progress.</i> 2. On Track - Referrals metric updated for 2026. Tracking modifications in development to understand type and quality of referrals. <i>Monthly review process established and standardized stewardship practices in development for DS and SWI for all referrals.</i>
GOAL 3: Differentiate and demonstrate our position as the market leader in charitable giving through informed and optimized use of data analytics	Subgoal 1: Create and implement dashboards for key business functions utilizing data.	Vanessa Frank Kathy	1. By end of Q2, OCF staff will develop stewardship and engagement plans for portfolios, focused on top fundholders as defined by segmentation strategy. 2. By end of 2026, OCF will integrate wealth tools and AI to enhance fundholder segmentation.	1. Complete 2. On Track - Foundant integration is unlikely by end of year. Key Experian data points are being assessed for integration into dashboards.	1. Donor services portfolios are segmented by work in the legacy space, successor space, community investment engagement and prospecting with clear direction on where to take each of those categories. SWIA portfolio is in initial phase of segmentation, working with Kathy and Jess regarding completion of full implementation by end of May. 2. On-Track Experian data previously procured was integrated as a test/validation against our client base. Conversation have occurred with Wealth Engine and Donor Search as well. Readiness is being weighted and industry alignment with our Foundant Partners.	1. On Track - DS and SWI are piloting engagement plans with 10 fundholders for each team member. <i>Advisors have identified their fundholders leveraging data provided in the DS dashboards and individual goals are tied to engagement planning.</i> 2. On Track - Exploratory discussions with Foundant and Wealth Engine are progressing. Fundholder dashboards currently include data overlay. <i>Foundant capabilities could be a hindrance to integration, though the team has leveraged Experian data within the DS dashboard as part of the fundholder pilot.</i>

Leading & Engaging Our Community with Intention

2027 Strat Plan Goals	2026 Goals	Owner	KPIs & Deliverables	Q3 Prograss Updates	Q2 Prograss Updates	Q1 Prograss Updates
GOAL 1: Cultivate a stronger, more connected community poised to reach sustainable, long-term improvements by enhancing nonprofit resilience and building trust in OCF.	Subgoal 1: Position OCF as a leader in nonprofit capacity building by serving as community convener, building external relationships, and delivering aligned programs including workshops, cohort/coaching, and merger/strategic alliance strategy.	Donna Laura	1. By end of 2026, OCF will have engaged at least 200 nonprofit partners through its nonprofit training and grant programs, with a target of 80% of participants reporting increased resilience, knowledge, or skills they can apply to strengthen their organizations.	1. On Track - Three total workshops completed to date (5/28, 6/23, 7/21). Next workshop planned for 8/28 Ongoing participant evaluation efforts. Total of ~140 individual attendees. Currently developing a report to count # of unique organizations that have participated.	1. First workshop May 28. Surveying participants.	1. Presenting to March Board, working to hire contractor.
	Subgoal 2: Strengthen trust in OCF through transparent communication, collaborative engagement, and consistent support.		2. 5-10% increase of trust based on a change in the baseline measurement of Pulse Survey conducted.	2. On Track - CI+PS teams will begin grant program process discussions this quarter to identify areas for streamlining and clarity, ultimately improving the grant applicant experience. CI team continuing to finalize trust-based scoring logic from CEP survey and strategies to improve trust drivers.	2. Pulse Survey work progressed from fielding and stakeholder outreach to analysis and leadership presentation in March. Survey illustrated clear areas to improve communication, transparency and feedback. Trust based scoring and logic is being reviewed by leadership/CI team. Team is working to improve trust based drivers through communication, selection clarity and feedback loops.	2. Pulse survey is in progress.
	Subgoal 3: Further enhance OCF's grant programs to strengthen nonprofit resilience, improve transparency, and deepen trust-based partnerships that contribute to long-term community impact.		3. By end of 2026, OCF will convene at least four sessions with external stakeholders to collectively map, navigate, and strengthen the continuum of nonprofit resiliency efforts in our community, fostering shared learning and collaboration.	3. On Track - Nonprofit Capacity Builders meeting scheduled for 8/31 w/ Sherwood, PKF, and others.	3. Meetings with facilitators and coaches, Sherwood, and TEAMS regarding nonprofit work + donor conversations.	3. Will set meeting with Sherwood, PKF, and others for first session. Had individual updates with each.
GOAL 2: Increase donor engagement and investment in community-identified areas of need, driving measurable and sustainable improvements for Omaha residents.	Subgoal 1: Position OCF community and nonprofit expertise to be a catalyst in increased giving, collaboration and progress, bringing together donors, nonprofits, and community partners around shared priorities.	Laura Vanessa Kathy	1. By end of 2026, establish a system for directing and measuring funding mobilized for shared priorities.	1. On Track	1. Prioritizing by tier, nonprofit work to ensure appropriate responsiveness and opportunity matching for fundholders/clients. Continuing fundraising efforts for disaster relief, Fund for Omaha, CIF, and utilizing those resources to better engage our fundholder/client base. Established in system reporting mechanisms.	1. On Track - Donor Engagement framework is in development.
	Subgoal 2: Expand support for areas of need by fostering connections with donors and partner organizations through educational initiatives and targeted awareness efforts.		2. By end of 2026, use OCF data and expertise to guide engagement decisions, evidenced by forming at least two community partnerships (ie. Leadership Omaha, CAP, etc.) and implementing other data-driven actions that strengthen donor and community relationships.	2. On Track	2. Leadership Omaha presentation complete for National philanthropic trends, but ways to be a leaders and involved in community happening later May. Stewardship of Tornado recovery has strengthened OCF's reputation and community relationships.	2. <i>Input needed on this KPI</i>
			3. By end of 2026, establish a baseline for the number of donors seeking community and nonprofit expertise, and implement strategies to increase this number by the end of the following fiscal year. (Supporting Direction 3)	3. Complete	3. Completed	3. On Track - Intake and tracking process for donor inquiries is complete to establish baseline.
GOAL 3: Build a more vibrant community and define COMMUNITY WIDE pillars of excellence by demonstrating our role as an action-oriented community leader, partner or connector committed to filling our community's gaps and unmet needs.	Subgoal 1: Advance one identified community pillar/key initiative with community partners, demonstrating OCF's leadership and role as a collaborative partner, and commitment to regional vibrancy.	Donna Kristi	1. By end of Q1, define OCF's convener or connector role to help advance Parks/Green Spaces initiative with peer foundations and City; and by end of Q2, define donor engagement strategy related to Parks/Green Spaces initiative.	1. On Track	1. Member of core working group working on public private partnership, facilitating hiring of parks plan contractor, coordinating investments of multiple donors for '26 & '27. Serving on Selection Committee for new City Parks Diretor.	1. OCF collaborating with other funders and Mayor on public private partnership. \$15M potential incremental investment. OCF convening and likely to serve as holder of 2027 funding.
	Subgoal 2: Participation with community partners through newly established committee/org or other opportunities for partnerships including public-private.		2. By end of 2026, identify OCF role with newly established committee/org and other opportunities for community leadership.	2. On Track	2. Helped facilitate philanthropic support and investment of new City role, Dir. of Transformation & Strategic Partnerships. Working with Innovation Group of leaders to form Omaha Forward, new SO for community initiative planning and public-private parternships.	2. Working with City and philanthropy peers on launching City's Dir of Tranformation and Strategic Partnerships position.
	Subgoal 3: Develop and implement a communications and marketing strategy that positions OCF as a visible and credible thought leader, strengthening external relationships, and regional influence.		3. 5 or more media mentions or public recognitions highlighting OCF's leadership.	3. Complete	3. Multiple stories on tornado recovery coordination. Media mentions on Chronicle of Philanthropy.com, KETV, and KMTV. The Omaha World Herald has set up an autopost to repost all of our blog content. They have posted DAF report research, wildfires response, community bank model and tornado response. OVG Article in OWH.	3. Need clarification if these mentions can be placements/PR we initiate through sponsored content and thought leadership? LTRG, community bank and assett mapping are all innovative and can be replicated, Nonprofit school as a modern model for CF, Landscape as a civic asset End of year giving article positioning OCF as philanthropic expert

Investing in People, Process and Technology

2027 Strat Plan Goals	2026 Goals	Owner	KPIs & Deliverables	Q3 Prograss Updates	Q2 Prograss Updates	Q1 Progress Updates
GOAL 1: Achieve internal efficiencies and a better employee and client experience by adopting and integrating new knowledge/technologies.	Subgoal 1: Optimize use and adoption of CSuite CRM and Grants Lifecycle Management (GLM)	Melisa Vanessa Frank	1. By end of 2026, all OCF staff will be trained to effectively utilize the CRM system, and 100% of profile data entered into the CRM will meet defined data quality standards, as validated through an audit process.	1. OnTrack - OCF staff receive ongoing CRM training with references available in OCF Knowledge Book. OCF relationship managers are actively updating key fundholder data leveraging audit reporting.	1. On Track - Multiple training sessions have occurred including Profile, Linking of Relationships, Reporting and Opportunities (Moves Management). Operational Dashboard created, CRM data attributes to drive 100% data quality standards approved by Data Governance Comittee.	1. On Track - Training schedule established with first training occurring in January. Data Governance committee established and actively defining data quality standards. Prioritization is a continuous challenge
	Subgoal 2: Launch Co-Pilot as OCF-wide AI tool, while exploring additional AI uses		2. By end of Q1, all staff will be trained to utilize Co-Pilot. By end of 2026, OCF will target 80% of staff reporting efficiency enhancements and process improvements as a result of Co-Pilot adoption.	2. OnTrack - OCF staff participated in 3 Co-Pilot trainings. A staff survey shows 13 of 13 staff members have seen some improvement or mesasurable improvments since leveraging Co-Pilot. 10 of 13 staff members have seen 1-2 hours, 3-5 hours, more than 5 hours of time savings each week.	2. Q1 Goal Completed as all OCF staff was licensed and trained and utilizing Co-Pilot. Monthly training sessions established for Co-Pilot. Additional AI products have been reviewed including Claude, PennyAI (Bloomerang) and SmartSimple. On Track - A survey has been established but current Microsoft Admin stats illustrates the following: OCF active user rate is 97.2% with total monthly prompts exceeding 3,281 across 36 users. Usage has been amazing, and many efficiencies/success stories have been shared.	2. On Track - AI Policy established. Co-Pilot launched for all staff. Survey for initial pilot with leadership team generated 4.4 out of 5 stars around improving work efficiency and 88.6% of pilot group reporting efficiencies.
	Subgoal 3: Leverage actionable data insights to empower decision-making		3. Quarterly, OCF operations will report three actionable insights* generated from leveraging data. <i>*Actionable Insights are defined as visibility that leads directly to decisions or actions to improve outcomes both internally and externally. Ex. Identifying incomplete donor profiles utilizing Operations CRM data quality dashboard triggers data cleanup.</i>	3. OnTrack - Exploring legacy and donor engagement reporting opportunities, and fundholder data quality.	3. On Track - Currently, OCF has produced over 400 reports within C-Suite, generated multiple Dashboards and generated AI reports leveraging CRM data. The team continues to focus on maturing the completeness/quality of the data through data visualization (Targeted approach)	3. On Track - 1. DS Dashboard provides team with data that provides visibility into portfolio grant activity to inform advisors which fundholders require outreach to encourage fund activation. 2. DS Dashboard marker in progress to indentify funds without a legacy plan supporting advisors in prioritizing outreach to fundholders. 3. Data Governance Committee leveraging data audit dashboard for visibility into profile requirements to define required and optional fields, impacting system accuracy and completeness for stewardship and marketing & communications to fundholders.
GOAL 2: Enhance employee engagement by establishing comprehensive development plans, career paths, and succession plans throughout the organization that are aligned with our strategic priorities.	Subgoal 1: Update compensation analysis and review with each team leader.	Rachel	1. Improved employee engagement scores, reflected in a 10% increase in team members' understanding of how they fit into the organization's future plans and a 10% increase in staff reporting positive recognition when contributing to organizational success.	1. Complete: Results finalized - "I know how I fit into the organization's future plans": +7.3% improvement (-2.7% below target) - "If I contribute to the organization's success, I know I will be recognized": +11.5% improvement (1.5% above target)	1. Complete: Results finalized - "I know how I fit into the organization's future plans": +7.3% improvement (-2.7% below target) - "If I contribute to the organization's success, I know I will be recognized": +11.5% improvement (1.5% above target)	1. On Track - Engagement survey completed at the end of January. Results expected from Quantum in early March.
	Subgoal 2: Create development plans for each team member, aligning with strategic plan and professional development budgets. Incorporate succession plans for management team.		2. By end of Q3, 100% of employees have development plans which are integrated with goal-centered review process.	2. On Track: Goal discussion has been integrated into review process; outcome-based development planning integrated into review process. Template for in-depth development plans in progress and is on track for target completion. Finalization to occur after finalization of career tracks.	2. On Track: Goal discussion has been integrated into review process; outcome-based development planning integrated into review process. Template for in-depth development plans in progress and is on track for target completion. Finalization to occur after finalization of career tracks.	2. On Track - Goal discussion has been integrated into review process; outcome-based development planning integrated into review process. Template for in-depth development plans in progress and is on track for target completion.
	Subgoal 3: Establish organization-wide training plan supporting leadership development structure.		3. By end of Q2, create a talent management tool that evaluates employees based on defined leadership competencies for use in 2027 review cycle.	3. Complete: Talent tool framework; defined competencies in progress via career tracking. Behind schedule: Career paths/tracks in progress; half are nearing finalization with cross functional pressure tests in progress. - Pending finalization: Marketing, DS, PS, Finance - Behind schedule: SWIA (restructuring), Community Investment (staffing changes), Admin Services (JD updates), Operations (JD updates)	3. On Track: Career paths/tracks in progress for each team. Target for final (v3) is end of May/early June: - v2 in review with leadership: Marketing, DS - v1 in review with leadership: PS, Finance, SWIA - v1/role updates: Operations, Admin Services	3. On Track: Career paths/tracks in progress for each team (estimated draft progress below). Once finalized, core competencies for each role/team to be finalized and integrated for team-specific talent management (and development plans mentioned above): DS: 75%, PS: 100%, Operations: 25%, SWIA: 90%, Finance: 75%, Community Investment: 25%, Administrative Services: 50%
GOAL 3: Increase organizational effectiveness by documenting and updating organizational policies and processes to reflect changes driven by technology, staffing modifications, National Standards accreditation requirements, and governance best practices.	Subgoal 1: Strengthen systems security and governance.	Melisa Vanessa Frank	1. By end of Q2, implement an annual test of security protocols across systems, ensuring OCF achieves an above-standard grade from our provider.	1.OnTrack - Completion of the Cloud Migration and Physical Server Decommission will be completed prior to OCF move. Laptop encryption also completed.	1. OnTrack - Ops and Admin Services conducted a comprehensive Four Box Analysis on IT/Security. This is being used to prioritize and execute the critical maturation of IT/Security practices at OCF. Execution includes: Fomal/External partner alignment, Data Gov Com Standup, Cowbell Cyber Risk review, Domain account review, SSO implementation in CRM/GLM, DarkWeb Generated Report, Enablement of PAM and Bitlocker and File Sharing (Internal/External) guidance procedures. Currently reviewing Firewall and wireless access points, Group Policy Best practices with audit/insurance lens, Backup and Recovery of CRM system, and strict vendor engagement with REDITECH.	1. On Track - Security risks identified and discussions with provider occurring 2/24 to develop test and address urgent risks. <i>Example includes exploration of moving the physical server to provider storage, removing Adobe Flash from all computers as it is a known security risk, and assessing password leaks for team members.</i>
	Subgoal 2: Identify and document improved workflow processes.		2. By end of Q2, identify 100% of workflows for each department. Implement an annual review of each department's documented workflows.	2. OnTrack - All critical workflows have been identified and continuing to expand.	2. OnTrack - Identification of critical workflows for each department is ongoing. The list is projected to be complete by EOM. Full business process mapping has been completed for critical system processes to date (e.g., Grant Application Process).	2. On Track - This is now a standing agenda item for management team meetings. <i>Recommending a workflow tracking and review process similar to policy review process.</i>
	Subgoal 3: Implementation of document retention policy.		3. By end of 2026, train the OCF staff and fully execute the document retention policy. Implement an annual audit to attain 100% compliance.	3. Behind Schedule - Meetings have occurred between Admin and Operations to begin to mobilize on this effort. Staff are actively working on entering donor agreements into CRM.	3. Trending below target - Systems and document retention are transitioning from paper/SharePoint into the CRM system. Systems will need to align with document retention with abilities to generate reports. Reprioritization of some staff and efforts will occur to focus on getting this goal on track.	3. On Track - Review of vendor infrastructure underway to inform retention practices. <i>Assessing Foundant's redundancy infrastructure before proceeding with CSuite as the main repository for fundholder agreements and other critical documents.</i>