



# INSPIRING GENEROSITY

STRATEGIC PLAN - 2018 - 2020

## Executive Summary





## EMBRACING CHANGE

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**Michael Chatman, President & CEO  
Cape Foundation  
Global Center for Generosity**

**“If you always do what you’ve always done, you’ll  
always get what you’ve always got.”  
– Henry Ford**

Our community is fluid. The ebbs and flows of local, regional, national and global issues constantly influence us. But we also carve a path for our region every time citizens and organizations choose to embrace change and seize the opportunity. The Cape Coral Community Foundation was born from seizing such an opportunity 45 years ago.

Federal and state funds are receding, and business owners are overwhelmed with requests from nonprofits who seek funds to fulfill their mission. These circumstances are not new, in fact, they are the same circumstances that prompted a group of local leaders, led by Dallas Darling, one of the founders of the Cape Coral Community Foundation, to find a solution to our community's increasing social needs.

Their plan: encourage charitable investments made by the community, for the community.

What built the Community Foundation then remains at its core today. Our staff works tirelessly to advance community philanthropy and better address our community's needs.

However, as the foundation enters a new era of change, accelerated growth and increasing competition, shifts in the charitable sector and our community led our Board of Directors and staff to embark on a strategic planning process. The process led us to conclude, to fully live out our vision and mission, the Community Foundation must not only lead locally, but also think regionally and globally.

Board members, current donors, community leaders, professional advisors and community foundation peers provided feedback through personal interviews and surveys. Your input, along with a review of our business model and coaching from other community foundations, produced a case for change that we then formalized into a two-year plan.

This plan outlines the steps that we believe will allow the Community Foundation to continue using its available resources to achieve the greatest impact possible. The following pages invite you to learn about our broader plan and think about how you or your organization might fit into our work, because your endorsement and participation are crucial to our success.

So, please join us as we work to carve a path toward a more vibrant and engaged local, regional and global community. With persistent optimism and a commitment to improvement, we will prevail as a community.

Michael Chatman, President & CEO

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# DEFINING OUR IDEOLOGY



## OUR MISSION

As stewards, we stimulate philanthropy that enriches our community and region's quality of life, through lasting and meaningful giving.

## OUR VISION

We foster a healthy and dynamic community where people are inspired to support, strengthen, and enrich the quality of life through generosity and civic engagement.

## OUR VALUES

INNOVATION  
SERVICE  
ENGAGEMENT  
RESPONSIBLE  
RESPECT  
EXCELLENCE

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# THE HEART OF OUR STRATEGY



The strategic intent of the Cape Coral Community Foundation, Global Center for Generosity, is to improve our community and region's quality of life by supporting donors, affiliated funds and increasing the capacity of our nonprofit sector. To accomplish this, we plan to improve on what we do today and incorporate new elements into our work that foster community, a culture of giving and long-term positive outcomes.

Over the next two years, we will focus our efforts on the following overarching objectives:

## **1. Build an energized and financially sustainable business model that aligns with our mission and meets our short – and long-term goals.**

An essential part of creating lasting change is ensuring that the Community Foundation lives on. Long-term viability for the organization is, therefore, a key objective. Fundholders serve as key economic drivers for the Foundation, so it is imperative that outright and deferred gifts to the Foundation increase over the next two years and beyond. Equally important are the revenues we generate through a healthy investment program and contributions to our Administrative Endowment fund.

Another essential element is an inspired board of directors to govern - focused on creating significant, sustainable and visionary improvement for the organization and community. Board recruitment, orientation, development and training is imperative to the Foundation. A strong and engaged board of directors will

increase our capacity to expand the Foundation's strategic objectives and, in turn, lead to an increase in philanthropic activity.

## **STRATEGIC BEHAVIORS**

**STRENGTHEN** - Evaluate existing business practices and restructure the organization for financial sustainability. Increase total financial resources with an emphasis on permanent assets.

**ENERGIZE** - Practice organizational excellence while fostering an energizing, collaborative, rewarding and fun culture to strengthen capacity to serve donors, affiliated funds, nonprofits and the community.

**LEAD** - Create an externally focused organization where staff and volunteers engage in leadership opportunities throughout the community.

## **WHAT WILL CHANGE?**

- Emphasize sustainability through all operations.
  - Design staff roles and tasks that align with strategic objectives.
  - Strive to achieve the highest financial returns, within acceptable risk parameters.
  - Provide more opportunities for leadership training to staff members.
  - Increase awareness and fundraising around the Administrative Endowment.
  - Strengthen partnerships with organizations advancing the nonprofit sector.
  - Lessen dependence on fundraising events and sponsorships to fund operations.
  - Clarity between staff and board roles and expectations.
  - Engage our Board of Directors more effectively through learning opportunities.
  - Focused board member recruitment aligned with the strategic plan.
  - Passionate board members who understand the mission and believe in the vision of the foundation.
  - Encourage increased civic involvement and leadership among staff.
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# THE HEART OF OUR STRATEGY



## 2. Engage and collaborate with affiliated funds and nonprofit

**partners, to discover their needs and solutions to current challenges, and strengthen our relationship with their leaders – and deepen our knowledge of the region.**

Community Foundations pursue broad, place-based missions and are designed to attract and grow substantial endowment dollars for scholarships, grants, programs and administrative needs. Community Foundations are seen as an objective source for philanthropy with a reputation for assembling expertise around pressing issues. These traits make the Community Foundation an ideal facilitator and partner with affiliated funds, nonprofits and donors to appraise community values, and to lead the philanthropic charge to generate new sources of revenue to meet the region's pressing issues.

By maintaining strong relationships, redefining and increasing our grant-making, our Board and staff aim to make a more substantial impact on vital community issues.

## STRATEGIC BEHAVIORS

**LEARN** - Partner with our affiliated funds and nonprofit partners, who are serving those in need, to expand and enhance our understanding of the critical regional issues and community trends.

**ENGAGE** - Provide opportunities for active dialogue with community leaders and residents around critical issues.

**IMPACT** - Continue to promote a strategic grant-making program with existing unrestricted funds, while also redefining grant-making through affiliated funds, increasing designated funds, and pursuing nonprofit capacity-building grants from national funders.

## WHAT WILL CHANGE?

- Increase presence and visibility locally, regionally and globally through first-rate marketing and public relations.
  - Serve the community by acting more as a convener and leader.
  - Participate in community conversations to promote collaboration.
  - Implement new initiatives and gatherings to engage all residents in philanthropy.
  - Expand efforts to gather and share grantee stories and community impact.
  - Gather stakeholders and leaders around community issues more often.
  - Promote leaders of affiliated funds and nonprofits as subject matter experts.
  - Grow partnerships and provide more funding opportunities.
  - Adopt more impact and multi-year granting policies.
  - Receive more nonprofit capacity-building grants from national funders.
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# THE HEART OF OUR STRATEGY



## 3. **Promote philanthropy by helping donors meet their charitable goals through connecting their passion to purpose.**

No other organization has such intimate knowledge of nonprofits and needs. By refocusing staff time, establishing new tools and working with an outside marketing and public relations firm, the Foundation will improve how it captures and communicates information on success stories and charitable organizations leading projects and programs. Our staff will continue to make this information actionable by providing the charitable expertise and range of giving options that donors and professional advisors have come to expect from us.

Through this approach, the Foundation will foster a culture of giving and increase charitable investments in our community.

### **STRATEGIC BEHAVIORS**

**INFORM** Educate the donor community about new ways of giving and expose them to creative approaches for donating non-cash assets and legacy giving options.

**INSPIRE** Excite current donors and attract new donors by increasing awareness and the understanding of the value of the Community Foundation.

## WHAT WILL CHANGE?

- Implement a more robust donor engagement plan.
  - Assess donor and affiliated fundholder values and interests in a more deliberate way.
  - Identify new opportunities for fund development to increase community grant-making.
  - Increase opportunities to learn about the community and nonprofits.
  - Expand and diversify the donor base for all area nonprofits.
  - Promote philanthropic services, fund stewardship and granting more effectively.
  - Make philanthropy more accessible through new initiatives and events.
  - Create new options for millennial donors to become philanthropists through lower fund minimums.
  - Enhanced storytelling to support donor funds and grantmaking.
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## ENVISIONING OUR FUTURE



For 45 years, generous people have trusted the Community Foundation as a reliable charitable steward.

This strategic plan honors that reputation by renewing the Foundation's historical promise to address the greatest needs in our community. It also reinforces our commitment to donors, charitable organizations and community leaders as generators of innovation and positive change.

What this plan introduces is a retooled approach to serving our community, which emphasizes inspiring charitable giving and growing endowments. This approach stems from our belief that the tools of philanthropy and community development creates a path to greater prosperity.

Unlike most community foundations, Cape Coral Community Foundation is not exclusively donor-driven. We seek to balance community needs with donor wishes. We are a value-added partner. We provide affiliated funds with assistance and technical expertise to maximize the effectiveness of community philanthropy. We make all forms of philanthropy more powerful.

This approach empowers our community leaders to help our local and regional communities to envision a better future and fund community needs and opportunities.

Our journey together starts by serving as a catalyst for leaders of charitable organizations talking through the barriers that prevent them from solving critical regional issues. We must not only serve as a catalyst, we must also serve as a connector to resources that will fund community needs and opportunities.

However, the horizon shows signs of accelerating change and increased complexity. Our strategic landscape is more uncertain than ever, which is why our Board and staff understand the need to refine our strategy as the regional landscape continues to evolve. Because of this, our strategic plan will serve as a flexible and dynamic document, sharply focused on the next two years.

Whether you are a fundholder, grantee, partner or community member, we welcome your input during this time. We understand that adopting this plan will bring intended and unintended changes to your lives as well, so your feedback is necessary for us to implement and adapt our plan accordingly.

Success is within reach, if we reach for it together. So, join us as we strive to improve our community's foundation – The Cape Coral Community Foundation, Global Center for Generosity.

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# INSPIRING GENEROSITY



**Cape Coral**  
COMMUNITY FOUNDATION  
THE GLOBAL CENTER FOR GENEROSITY