

## Mission

We empower all people to make a permanent impact and leave a lasting legacy in our region.

## Vision

We envision an inclusive and engaged culture of philanthropy that grows an abundance of resources, achieving perpetual impact in a thriving region.

## Values

Philanthropy – recognizing that every person has the potential to leave a legacy  
 Empowerment – partnering with our donors to realize their philanthropic dreams  
 Integrity – exemplifying honesty and transparency in all that we do  
 Leadership – understanding, identifying, and responding to community opportunities in an inclusive manner  
 Collaboration – leveraging and connecting community resources to maximize impact for all

## Strategic Pillars and Goals

1. Growing Our Assets	2. Communicating CFA and Our Region	3. Facilitating Community Impact	4. Enhancing Operational Excellence
1.1. Grow the total number and value of our funds.  1.2. Nurture relationships with wealth advisors.	2.1. Position staff and board members as ambassadors for CFA and the region.  2.2. Grow awareness of the CFA brand.  2.3. Strongly advocate for our region and our role in regional impact.	3.1. Advance CFA's role as a valued catalyst and collaborator in each of our counties.  3.2. Develop expertise in Mission-Based Investing.  3.3. Develop and grow field of interest funds that enable county-specific and regional impacts.	4.1. Develop and implement an asset management subsidiary.  4.2. Optimize staff to their strengths.  4.3. Plan for succession for key staff and board positions.

# Goals, Objectives, Strategies, and Tactics

Detailed operational tactics for the execution of each strategy to be developed by staff.

## 1. Growing Our Assets

<b>Goal</b>	<b>1.1. Grow the total number and value of our funds.</b>				
<b>Objective</b>	1.1.A. Grow by \$82 million over the next 5 years in order to increase assets to \$200 million by 2028				
<b>Strategy</b>	<b>1.1.1. Steward existing donors to encourage growth of current funds</b>	Owner	Start	End	Resources
<b>Tactics</b>	1.1.1.1. Leverage board members to be ambassadors to fund representatives where appropriate				
	1.1.1.2. Improve communications with donors				
	1.1.1.3. Utilize gift range calculator to set targets and assess progress				
<b>Strategy</b>	<b>1.1.2. Start new funds from existing and new relationships</b>	Owner	Start	End	Resources
<b>Tactics</b>	1.1.2.1.				
	1.1.2.2.				

<b>Goal</b>	<b>1.2. Nurture relationships with wealth advisors.</b>				
<b>Objective</b>	1.2.A. Grow PLAN relationships with wealth advisors who are working with philanthropic clients				
<b>Strategy</b>	<b>1.2.1. Increase membership in the PLAN program</b>	Owner	Start	End	Resources
<b>Tactics</b>	1.2.1.1.				
	1.2.1.2.				
<b>Strategy</b>	<b>1.2.2. Develop and implement Transfer of Wealth programming</b>	Owner	Start	End	Resources
<b>Tactics</b>	1.2.2.1.				
	1.2.2.2.				

## 2. Communicating CFA and Our Region

<b>Goal</b>	<b>2.1. Position staff and board members as ambassadors for CFA and the region.</b>				
<b>Objective</b>	2.1.A. 100% of board and staff members will achieve expert-level knowledge about CFA and our role in the region				
<b>Strategy</b>	<b>2.1.1. Invest in training and professional development for staff and board</b>	Owner	Start	End	Resources
<b>Tactics</b>	2.1.1.1.				
	2.1.1.2.				
<b>Strategy</b>	<b>2.1.2. Improve the staff orientation and onboarding process</b>	Owner	Start	End	Resources
<b>Tactics</b>	2.1.2.1.				
	2.1.2.2.				
<b>Strategy</b>	<b>2.1.3. Improve the board and committee orientations and relationship development process</b>	Owner	Start	End	Resources
<b>Tactics</b>	2.1.3.1.				
	2.1.3.2.				

<b>Goal</b>	<b>2.2. Grow awareness of the CFA brand.</b>				
<b>Objective</b>	2.2.A. Focused message and unified communications plan developed that supports the four pillars of this strategic plan				
<b>Strategy</b>	<b>2.2.1. Engage marketing consultant(s)</b>	Owner	Start	End	Resources
<b>Tactics</b>	2.2.1.1.				
	2.2.1.2.				
<b>Strategy</b>	<b>2.2.2. Develop and launch targeted marketing campaigns to engage multi-generational audiences</b>	Owner	Start	End	Resources
<b>Tactics</b>	2.2.2.1.				
	2.2.2.2.				
<b>Strategy</b>	<b>2.2.3. Grow paid, earned, owned, and shared media</b>	Owner	Start	End	Resources
<b>Tactics</b>	2.2.3.1.				
	2.2.3.2.				

<b>Goal</b>	<b>2.3. Strongly advocate for our region and our role in regional impact.</b>				
<b>Objective</b>	2.3.A. Enhance perception of CFA as a strong advocate for our four-county region				
<b>Strategy</b>	<b>2.3.1. Implement marketing plan recommendations</b>	Owner	Start	End	Resources
<b>Tactics</b>	2.3.1.1.				
	2.3.1.2.				

### 3. Facilitating Community Impact

<b>Goal</b>	<b>3.1. Advance CFA's role as a valued catalyst and collaborator in each of our counties.</b>				
<b>Objective</b>	3.1.A. Key partnerships and programs achieved in each county that support Goal 1 of this strategic plan				
<b>Strategy</b>	<b>3.1.1. Enhance CFA's physical presence in each county</b>	Owner	Start	End	Resources
<b>Tactics</b>	3.1.1.1.				
	3.1.1.2.				
<b>Strategy</b>	<b>3.1.2. Strategically expand committees in each county</b>	Owner	Start	End	Resources
<b>Tactics</b>	3.1.2.1.				
	3.1.2.2.				
<b>Strategy</b>	<b>3.1.3. Recruit strong board members from each county</b>	Owner	Start	End	Resources
<b>Tactics</b>	3.1.3.1.				
	3.1.3.2.				

<b>Goal</b>	<b>3.2. Develop expertise in Mission-Based Investing.</b>				
<b>Objective</b>	3.2.A. Determine value of and logistics for making market rate investments that generate positive social impact and competitive financial returns				
<b>Strategy</b>	<b>3.2.1. Engage an investment consultant for MBI assessment and training</b>	Owner	Start	End	Resources
<b>Tactics</b>	3.2.1.1.				
	3.2.1.2.				
<b>Strategy</b>	<b>3.2.2. Develop a plan and recommendations for board consideration</b>	Owner	Start	End	Resources
<b>Tactics</b>	3.2.2.1.				
	3.2.2.2.				

<b>Goal</b>	<b>3.3. Develop and grow field of interest funds that enable county-specific and regional impacts.</b>				
<b>Objective</b>	3.3.A. Increase total assets in new field of interest funds by 2028				
<b>Strategy</b>	<b>3.3.1. Define priority areas beyond Early Childhood Education and Community/Economic Development</b>	Owner	Start	End	Resources
<b>Tactics</b>	3.3.1.1.				
	3.3.1.2.				
<b>Strategy</b>	<b>3.3.2. Promote focus areas as field of interest opportunities for philanthropy</b>	Owner	Start	End	Resources
<b>Tactics</b>	3.3.2.1.				
	3.3.2.2.				

## 4. Enhancing Operational Excellence

<b>Goal</b>	<b>4.1. Develop and implement an asset management subsidiary.</b>				
<b>Objective</b>	4.1.A. Subsidiary created and launched to support Foundation operationally, improve internal efficiencies, and protect Foundation assets				
<b>Strategy</b>	<b>4.1.1. Enhance relationships with larger foundations for pass-through funding</b>	Owner	Start	End	Resources
<b>Tactics</b>	4.1.1.1.				
	4.1.1.2.				
<b>Strategy</b>	<b>4.1.2. Develop internal processes for movement of assets to subsidiary</b>	Owner	Start	End	Resources
<b>Tactics</b>	4.1.2.1.				
	4.1.2.2.				
<b>Strategy</b>	<b>4.1.3. Build a communications plan related to the subsidiary</b>	Owner	Start	End	Resources
<b>Tactics</b>	4.1.3.1.				
	4.1.3.2.				

<b>Goal</b>	<b>4.2. Optimize staff to their strengths.</b>				
<b>Objective</b>	4.2.A. All staff roles and responsibilities aligned to advance projected growth opportunities by 2028				
<b>Strategy</b>	<b>4.2.1. Review and refine staff structure and organizational chart</b>	Owner	Start	End	Resources
<b>Tactics</b>	4.2.1.1.				
	4.2.1.2.				
<b>Strategy</b>	<b>4.2.2. Create new positions to support strategic plan implementation</b>	Owner	Start	End	Resources
<b>Tactics</b>	4.2.2.1.				
	4.2.2.2.				
<b>Strategy</b>	<b>4.2.3. Further invest in staff professional development and training</b>	Owner	Start	End	Resources
<b>Tactics</b>	4.2.3.1.				
	4.2.3.2.				

<b>Goal</b>	<b>4.3. Plan for succession for key staff and board positions.</b>				
<b>Objective</b>	4.3.A. Succession plans created for 100% of key positions				
<b>Strategy</b>	<b>4.3.1. Plan for knowledge and relationship transfers</b>	Owner	Start	End	Resources
<b>Tactics</b>	4.3.1.1.				
	4.3.1.2.				
<b>Strategy</b>	<b>4.3.2. Expand program staff to enable cross-training</b>	Owner	Start	End	Resources
<b>Tactics</b>	4.3.2.1.				

	4.3.2.2.				
<b>Strategy</b>	<b>4.3.3. Continue to optimize board diversity, structure, and governance</b>	Owner	Start	End	Resources
<b>Tactics</b>	4.3.3.1.				
	4.3.3.2.				

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