

VISION

A region of healthy, resilient, thriving communities for all.

MISSION

We invest in the people and places of our region and steward community assets for lasting impact.



OUR CORE VALUES

Stewardship

We are responsible stewards of the human, financial, and natural resources entrusted to our care and committed to those resources contributing to a sustainable society, environment, and economy.

Integrity

We build trust and confidence through honesty, transparency, open communication, and fairness; and engage in best practice through National Standards certification.

Generosity

We cultivate a culture of generosity by celebrating giving of all kinds and by nurturing authentic relationships that are built on empathy, kindness, and trust.

Collaboration

We listen to diverse voices, build collaborative partnerships, and foster a spirit of teamwork and interdependence.

Equity

We seek to ensure all people in our community have equitable access to opportunities for a healthy, thriving life and will ensure diversity, equity, and inclusion is reflected in all facets of our work.

Adaptability

We believe our best work happens as individuals, as an organization, and as a community when we are creative, innovative, and continuously learning.

OUR STRATEGIC GOALS

Accountability and Focus

Leverage our resources to ensure organizational strength and stability.

Awareness and Relationship Building

Increase affinity and build deeper relationships to cultivate a culture of generosity.

Collaboration and Community Impact

Expand collaborations and steward our resources to maximize community benefit.

Equity and Inclusion

Deepen investment in diversity, equity, and inclusion to fully integrate equity into our work.





2022 - 2025 Strategic Plan / Objectives + Strategies

ACCOUNTABILITY + FOCUS > Leverage our resources to ensure organizational strength and stability

Objective 1: Create an office environment that promotes a collaborative, inclusive work place

- Strategy 1: Secure long-term office space to meet current and anticipated future needs
- Strategy 2: Maintain hybrid workspace solutions and operations

Objective 2: Maximize stability and sustainability of operating revenue model

- Strategy 1: Review and identify growth potential for primary operating revenue sources
- Strategy 2: Enhance operational stability through Operating Reserve Fund

Objective 3: Engage in best practices related to organizational policies and workplace standards

- Strategy 1: Maintain National Standards Certification
- Strategy 2: Formalize policy procedures and update/develop new policies as needed

Objective 4: Promote collaboration, affinity, and continuous learning for staff and Board

- Strategy 1: Promote collaboration, affinity, and continuous learning for staff
- Strategy 2: Promote collaboration, affinity, and continuous learning for Board
- Strategy 3: Ensure long-term strength and stability of staff and Board capacity

AWARENESS + RELATIONSHIP BUILDING > Increase affinity and build deeper relationships to cultivate a culture of generosity

Objective 1: Increase partnerships and engagement with professional advisors

- Strategy 1: Create a process for meeting and engaging new PAs
- Strategy 2: Increase professional advisor referrals by 10% each year

Objective 2: Effectively engage and support board and staff as ambassadors (to donor, nonprofit, other community partners)

- Strategy 1: Increase Board Engagement with 100% of Board volunteering at least 1-2 times
- Strategy 2: Curate stories that appeal to varied stakeholders and share across all mediums

Objective 3: Achieve Campaign for Community Funds Goal

- Strategy 1: Strengthen and grow engagement among major donor partners
- Strategy 2: Grow number and value of known planned gifts to Community Funds
- Strategy 3: Strengthen and grow engagement among annual giving partners
- Strategy 4: Create sustainability of DEI Fund

Objective 4: Increase how we are known and trusted by activating core audiences toward giving, either directly and/or through referrals.

- Strategy 1: Develop and implement comprehensive communications plan annually
- Strategy 2: Increase likelihood of stakeholders to refer the CF for giving (as measured by Net Promoter Score)



2022 - 2025 Strategic Plan / Objectives + Strategies

COLLABORATION AND COMMUNITY IMPACT > Expand collaborations and steward our resources to maximize community benefit

Objective 1: Expand sources of community impact beyond grantmaking

- Strategy 1: Launch Impact Investing Strategy
- Strategy 2: Create opportunities to connect donor partners to community projects and priorities
- Strategy 3: Pursue funding opportunities from outside the region
- Strategy 4: Engage in advocacy efforts aligned with vision and mission.

Objective 2: Maximize impact of, and build sustainability for, Community Development Strategy

- Strategy 1: Achieve measurable improvement on minimum of three Community Development Scorecard Objectives
- Strategy 2: Develop strategy for long-term stability and sustainability for Community Development

Objective 3: Formalize Grantmaking Strategy that integrates DEI and Trust-Based Philanthropy Strategies

- Strategy 1: Award grants that are unrestricted, for general operating, and/or multi-year
- Strategy 2: Increase access to funding through effective grants systems and processes
- Strategy 3: Increase transparency of grant process, decision-making, and evaluation

Objective 4: Maximize impact of cornerstone programs/endowments

- Strategy 1: Leverage the Purdy Endowment within Central Lake and beyond
- Strategy 2: Optimize impact of Larson Endowment
- Strategy 3: Develop enhanced model for YAC as a Youth Leadership Development program

EQUITY + INCLUSION > Deepen investment in diversity, equity, and inclusion to fully integrate equity within our work

Objective 1: Adjust Foundation systems, policies, and procedures to more fully integrate inclusive and equitable language and processes

- Strategy 1: Evaluate current systems, policies, and processes and identify areas for adjustment
- Strategy 2: Evaluate Board recruitment and governance and processes and determine opportunities to increase accessibility and transparency

Objective 2: Embrace a culture of learning across the organization related to DEI

- Strategy 1: Implement ongoing learning plan for staff
- Strategy 2: Implement ongoing learning plan for Board
- Strategy 3: Demonstrate leadership and commitment to continuous learning to internal and external stakeholders

Objective 3: Ensure staff and board is representative of our community through increasing diversity

- Strategy 1: Evaluate and identify opportunity to increase diversity of staff and Board