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.

**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.

**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.

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

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

**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.

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

Objective 1: Create an office environment that promotes a collaborative, inclusive workplace
- 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