

Strategy Plan:

A vision for Cape
Coral Community
Foundation



Mission Statement:

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

Values

EXCEPTIONAL SERVICE

We serve and amaze our clients (donors, nonprofit partners, professional advisors, corporate partners and national foundations), nurturing lifelong relationships that span generations.

STEWARDSHIP

We safeguard donor intent in perpetuity, ensuring the resources entrusted to us are protected and invested in positive, sustainable outcomes for the Southwest Florida community.

INTEGRITY

We earn the trust of those we serve by operating ethically and transparently, honoring our commitments, and showing courtesy and respect in all aspects of our work.

INNOVATION

We demonstrate and welcome creativity, resourcefulness and ingenuity. We invite and encourage new ideas, pioneering practices and inventive methods for achieving community good.

NIMBLENESS

We are flexible, responsive, open to creative strategies and unusual requests, and able to take prompt action.

GLOBAL

Our strength is found in our global thinking and willingness to cultivate and spread a message of generosity within Cape Coral and abroad. We believe the diverse voices of local, regional and global thinkers are essential to increasing engagement, building, and sustaining thriving communities.

COLLABORATION

We believe in the transformative power of partnerships around shared passions and objectives. We encourage and celebrate teamwork, pooling resources, open communication and trust.

Key Business Drivers



Donor Services & Engagement



New Markets & Business Development



System Improvements



Communications & Brand Amplification



Community Leadership & Impact



Talent & Organizational Development



1. DONOR SERVICES & ENGAGEMENT

We see our donors as community leaders seeking a social return on their investment. To serve our communities well, we must serve our donors and their aspirations well. Foremost in our work is preserving each donor's connection to their generosity. It is that connection that drives real change.

To enhance and engage donors and provide the best philanthropic services, we will:

- Combine development, programs, grantmaking, and initiatives into a unified philanthropic services team, with professional philanthropic advisors offering sophisticated giving and granting opportunities as well as high quality philanthropic advice to donors.
- Create and implement a relationship management system that places every donor in the hands of a dedicated, skilled, proactive, professional staff member.
- Enhance donor educational offerings to increase learning, encourage collaboration and foster networking.
- Grow CCCF's grantmaking and increase repeat giving to established funds by re-engaging and incentivizing inactive donor advisors.
- Better inform fund-holders about their fund activity, the impact of their grantmaking, and the Foundation's financial position and investment performance.



Measuring Success

Enhanced donor satisfaction reported in surveys and staff interaction / growth in charitable assets held at CCCF / growth in grantmaking from donor advised funds / greater participation in donor education events / increased donor-initiated engagement, communication and interaction.



2. New Markets & Business Development

New philanthropists and generous givers are following the lead of entrepreneurial major donors by studying issues and causes in order to make informed investments. In short, they wish to make not just a donation, but a difference. It is incumbent upon us to reach out to new markets with the tools that will facilitate this type of outcomes-based philanthropy. In addition, in order to sustain our quality programs and services, we must develop new areas of business and provide new services that produce revenue to support our work.

To reach and engage new markets and develop new sources of business revenue, we will:

- Build a \$10 million administrative endowment by 2026 to fund operations and offer philanthropic services for donors at the lowest possible cost.
- Provide a range of fee-based services to assist private foundations, ministries, nonprofits, grantmakers and corporations in their grantmaking and generate new revenue, including developing the foundation as a Global Center for Generosity.
- Provide differentiated and creative social investment and funding options to suit the entrepreneurial donor, including program- and mission-related investments, bridge loan funds, venture funds and philanthro-capitalist funds.
- Offer low-entry point giving options for new and younger donors to grow a fund over time.
- Retool scholarship offerings to invite new and more donors and applicants, streamline processes, reduce costs, and generate additional revenue.
- Expand and deepen existing relationships and build new relationships with financial institutions to grow this referral source.



Measuring Success

Increased revenue from new sources / donor participation in new investment opportunities / growth in new and young donors creating named funds / growth in number and size of scholarship funds / growth in corporate partners / growth in church & ministry funds / increased scholarship award applications / referral source expansion.

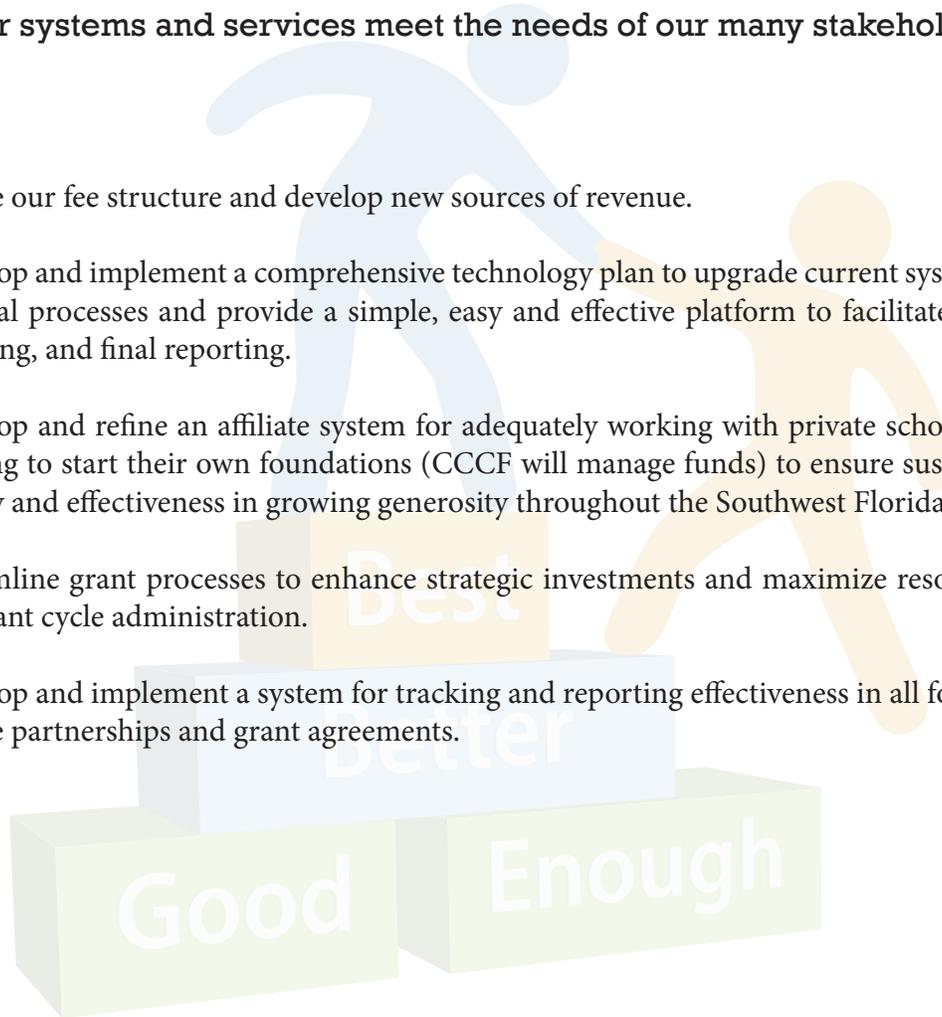


3. System Improvements

In order to provide our stakeholders with quality service and timely assistance, we must ensure our internal systems, technological capabilities and business processes meet industry standards, are well-managed, and effective in supporting our strategic priorities.

To ensure our systems and services meet the needs of our many stakeholders, we will:

- Refine our fee structure and develop new sources of revenue.
- Develop and implement a comprehensive technology plan to upgrade current systems, automate manual processes and provide a simple, easy and effective platform to facilitate donor giving, granting, and final reporting.
- Develop and refine an affiliate system for adequately working with private schools and church seeking to start their own foundations (CCCF will manage funds) to ensure sustainability, efficiency and effectiveness in growing generosity throughout the Southwest Florida region.
- Streamline grant processes to enhance strategic investments and maximize resources required for grant cycle administration.
- Develop and implement a system for tracking and reporting effectiveness in all foundation, corporate partnerships and grant agreements.



Measuring Success

Increased revenue from new sources / donor participation in new investment opportunities / growth in new and young donors creating named funds / growth in number and size of scholarship funds / growth in corporate partners / growth in church & ministry funds / increased scholarship award applications / referral source expansion.

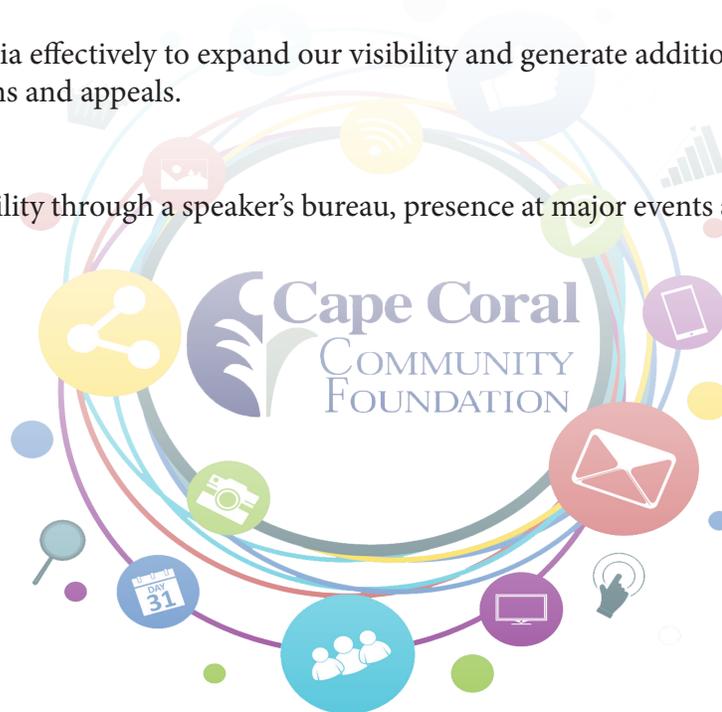


4. Communication & Brand Amplification

Community foundations tend to be a community's best-kept secret. It's time for the Cape Coral Community Foundation to emerge and lead as one of Southwest Florida's focal points for generosity. We will create a culture of generosity in our region to inspire collaboration, leverage resources and better capitalize on the time, talent, and treasure that will enhance the quality of life here.

To amplify public awareness, understanding and engagement with the Cape Coral Community Foundation, we will:

- Develop and implement an awareness campaign and ultimately, a major mixed-media marketing campaign to educate the public about endowments and structured philanthropy, help nonprofits build organizational funds and increase lifetime and legacy endowment gifts.
- Utilize social media effectively to expand our visibility and generate additional funding through targeted campaigns and appeals.
- Increase our visibility through a speaker's bureau, presence at major events and increased strategic partnerships.



Measuring Success

Funding secured for campaign implementation / enhanced awareness and brand recognition as measured through pre- and post- campaign surveys / implementation of social media strategy / growth in online community / increased requests for speakers / increase in requests to partner and assume leadership roles on key issues.



5. Community Leadership Impact

Along with our donors, we seek high impact and measurable results. We want to achieve a “social return” on the grants and investments we make, and we need to see that return, measure it and understand it in real terms. Outcomes-based thinking requires us to focus on the human and systemic results of an investment – not only providing funds to an organization or program.

To serve as a leader on important issues and achieve greater impact through our investments, we will:

- Develop and promote sophisticated giving portfolios and strategically identified co-investment opportunities.
- Implement an evaluation protocol for potential initiatives to determine feasibility, impact, risk and community benefit.
- Unite local and regional residents through town hall conversations to strengthen the network of philanthropic leaders engaged in civic participation.
- Pursue a focused, nonpartisan community leadership agenda identifying and developing two to three high-need areas of primary interest to our donors.



Measuring Success

Enhanced donor engagement around new grantmaking and investment opportunities / development and engagement of stakeholders with community leadership agenda / greater connectivity between residents and CCCF / well-managed initiatives creating positive outcomes.



6. Talent & Organizational Development

An important step in being a great business is getting the “right people on the bus and in the right seats.” Since ours is a highly personal business, the knowledge, skills and professionalism of our staff are of utmost importance in achieving all of the objectives outlined in this plan.

To ensure we attract, retain and develop top talent to achieve our strategic objectives, we will:

- Standardize operating procedures and application of best practices across the organization.
- Implement an improved issues reporting, tracking and resolution system to better serve donors.
- Realign and refocus the staff to support our mission and goals, balancing workload and staffing levels to ensure high productivity, efficiency and world-class customer service.
- Grow the talent and performance of staff through a well-defined performance appraisal system, incorporation of core values into job requirements, higher expectations, coaching and professional development, and performance-based compensation.



Measuring Success

Increased donor satisfaction regarding customer service / completion of staff realignment / implementation of new performance management system / successful recruitment and retention of staff.