Strategic Change Charter Framework
2021-2023
Strategic Change Charter Framework: 2021-2023

The Planning Process: 2021-2023

- Six months and 650+ people hours later, including the efforts of all board and staff committees, seven Community Foundation of the Lowcountry Change Charters were in the works, focusing on Development and Donor Services, Community Impact, Finance and Investment, Marketing and Communications, Human Resources, Culture Club and Technology.

- These Change Charters identified the “Present State” of each sector of the organization, as well as “Future or Desired State,” what components were needed to make these transitions, along with “Visions for Success” and how that change would take place.

- From the various components of these Change Charters’ Future States, the present strategic plan process was begun.

- A set of Guiding Change Principles and the related Key Elements for the Strategic Plan 2021-2023 were established.

- The Executive Leadership Team, along with members of their board committees, then developed the Objectives to support the Key Elements of the identified Guiding Change Principles.

- The development process of the Key Elements and Supporting Objectives was a cross-team process to ensure that the work being planned was understood by all and coordinated across all offices.

- Upon the approval of the Guiding Key Elements and Supporting Objectives, the Executive Leadership Team, using both the details in the Change Charters and the work of the board committees, will create the Work/Action Plans for their respective Guiding Key Elements.

- The Strategic Change Charter Framework: 2021-2023 has been fully developed for implementation upon approval, for the 2021-2023 timeframe, with the understanding that under new leadership there may be changes and additions to components of this comprehensive planning document.

- This collective work has proven to be most productive across the organization in allowing all to learn from each other and work with each other to develop a cohesive and focused planning document for Community Foundation of the Lowcountry, 2021-2023.
Our Mission
Strengthening community by connecting people, resources and needs.

Our Vision
Community Foundation of the Lowcountry will be the leader in strengthening the greater community as the most respected and able provider of philanthropic direction, management, education and support to the people in all segments of the communities we serve.

Our Core Values
We are dedicated to the following core values: integrity, honesty, respect, fairness, caring, stewardship and responsiveness.

Our Tagline
For Good. Forever.

Our Guiding Change Principles:

We are committed to:

- Developing a Culture of Philanthropy throughout the organization and the community at large.
- Developing and implementing enhanced donor-centric stewardship programs and services focused on building long-term relationships.
- Establishing and enhancing philanthropic strategies, products and services aligned to high level prospects and donor interests.
- Redefining our grants process to demonstrate impact and build capacity within our community and the organizations that support it.
- Leading our area nonprofits to build their capacities of strategic philanthropic work within our community.
- Establishing and supporting a social and racial justice statement to raise the quality of life for all in the Lowcountry.
- Communicating across all media resources to inform our community and share our story.
- Revitalizing our business model to meet the changing needs and the demands of all our community stakeholders.
- Offering a progressive employment opportunity to develop and support an exceptional CFL team.
Our Key Change Elements and Supporting Objectives:

Development and Donors Services

Key Element 1: Developing a Culture of Philanthropy as a core principle within the organization and throughout the Lowcountry region.

Objective 1A: Adopt and implement the Ambassador Program as the catalyst for connecting donors, community leaders and professional advisors with the CF’s mission by all Board and Directors Council members and community volunteers.

Objective 1B: Develop and implement strategies to identify and build relationships within newly defined prospect and donor segments.

Objective 1C: Identify and implement a program for connecting prospects, donors and fund advisors with the CF’s impact and community knowledge, increasing collective giving opportunities.

Key Element 2: Developing and implementing enhanced donor centered stewardship programs and services focused on building long-term relationships.

Objective 2A: Implement a “donor centered” approach by all staff to ensure high quality interactions with stakeholders and foster long-term donor relationships.

Objective 2B: Increase our focus and implementation of donor stewardship plans for all donor, fund and CF relationship types to improve overall responsiveness in meeting donor needs and expectations.

Objective 2C: Broaden the funding base through increased contributions to existing funds, establishment of new funds and development of future gift revenue sources.

Key Element 3: Implementing development and donor services strategies aligned with opportunities unique to each county within our service area.

Objective 3A: Identify and implement a market capacity and growth analysis tool for use in determining development potential, goals and measurements.

Objective 3B: Align all products, donor services and fees with non-profit and for-profit competitors to assure CF’s ability to attract and secure ideal prospects and strengthen existing donor relationships.

Objective 3C: Provide excellent philanthropic products, services and meaningful engagement opportunities for donors in order to ambitiously grow the CF’s portfolio, based on market capacity.
Community Investment
Key Element 1: Redefine our competitive grantmaking process to demonstrate impact and build capacity within our communities and the non-profit organizations that support them, to include changes in cycle, theme and direction.

Objective 1A: Transition from general grantmaking to identified impact grantmaking with Year 1 focus on organization impact and/or project impact.

Objective 1B: Initiate Community Indicator Study to define specific impact areas for grantmaking for Year 2 and/or Year 3.

Objective 1C: Implement Specific Impact Area(s) Grantmaking.

Objective 1D: Create internal process to report impact from grantmaking to Marketing and Communications for reporting to external stakeholders.

Key Element 2: Lead area nonprofits to build leadership and structural capacity in order to meet needs of strategic philanthropic work within our 4-county service area.

Objective 2A: Develop a new mindset of sustainability for non-profits to meet community needs through foundation grants and Community Investment programs.

Objective 2B: Expand Organizational Development programs for new or existing grass roots non-profit organizations.

Objective 2C: Create internal process to report capacity building program information to Marketing and Communications for reporting to external stakeholders.

Objective 2D: Provide comprehensive training opportunities for nonprofits within the greater 4-county service area.

Key Element 3: Support and impact in a positive manner, members of our communities who face challenges of social and racial injustice.

Objective 3A: Partner with agencies focused on providing solutions to community challenges relating to social injustice.

Objective 3B: Host events seeking to build cross cultural relationships.

Objective 3C: Grant funds to organizations focused on addressing societal challenges including racism.
Finance and Administration

Key Element 1: Increase operating stability by revitalizing our business model to promote growth in operating revenue and increased efficiencies.

Objective 1A: Improve operating efficiencies by reviewing processes and using technology to meet the changing needs and demands of all of our staff and community stakeholders.

Objective 1B: Improve fiduciary communications with consistent and reliable reporting along with complete transparency to our stakeholders.

Key Element 2: Deliver consistently strong investment results and oversight while utilizing a diverse mix of investment categories designed to outperform in widely varying markets.

Objective 2A: Conduct a comprehensive review of our investment policy, including consideration of investment advisors and creating additional donor investment options.

Objective 2B: Maximize the potential knowledge of the Finance and Investment Committee by recruiting community members with the appropriate background (finance, audit, investment, etc.) from our four-county service area.

Key Element 3: Strive to be the nonprofit employer of choice offering a progressive employment opportunity.

Objective 3A: Revise and implement an effective employee performance plan.

Objective 3B: Explore and implement a new resource for measuring organization culture.

Objective 3C: Conduct a review of salaries and benefits annually while maximizing the use of an efficient PEO (Professional Employer Organization) as the outsourced solution for Human Resources to remain the employer of choice.

Objective 3D: Develop and implement a professional development plan for current staff and an onboarding plan for new employees that will set expectations and orient them to all aspects of the organization’s work.
Marketing and Communications

Key Element 1: Communicate across all media channels to inform our community and share our story.

Objective 1A: Build awareness of, and engagement in, our culture of philanthropy

Objective 1B: Increase donor and prospect engagement through targeted communication

Objective 1C: Ensure the community is aware of our statement on social and racial justice by integrating the statement into our messaging and marketing materials

Objective 1D: Educate nonprofit organizations and community stakeholders about redefined CFL grantmaking

Objective 1E: Publicize Community Investment capacity-building programs for nonprofit agencies

Key Element 2: Develop appropriate tools that provide a framework for successful communication planning, execution and reporting.

Objective 2A: Build a written, comprehensive marketing/communications plan that incorporates organizational and departmental strategic initiatives. The plan will list tactics, identify audiences, indicate appropriate channels and define timelines.

Objective 2B: Produce a dashboard of relevant analytics that measures success of our communication strategies and efforts.

Objective 2C: Create a dashboard of organizational accomplishments/metrics that can be shared with the community to illustrate community impact.

Objective 2D: Create an internal tool/calendar that lists organization-wide activities and events to improve planning and workflow.