

STRATEGIC PLAN SUMMARY  
2011 – 2015



Omaha Community  
Foundation

Let good grow.



## HELPING PEOPLE WHO LOVE OUR COMMUNITY DO THE MOST GOOD

Everyone has a role to play in helping Omaha grow — in making this a stronger community and an even better place to live.

Over \$712 million has been granted to nonprofits on behalf of our donors. And since 1982, our family of donors has given over \$1 billion in new gifts to the Omaha Community Foundation. Much has been accomplished, but now we are ready to do more.

Through the combined efforts of our Board of Directors and professionals, we created a strategic plan that will lead us through 2015. This new plan is designed to strengthen Omaha through our work with donors, nonprofits, and the community, seeking to make even greater impact. The Omaha Community Foundation is not reinventing itself — we are simply adapting to a changing environment and finding ways to ensure that our philanthropic work can continue.

I am pleased to present a condensed version of the Omaha Community Foundation's current five-year strategic plan. You will find that our plans are ambitious, yet achievable. This framework is intended to be a dynamic guide that evolves as we move forward. I welcome any comments regarding our plans.

Michael Leighton  
President and CEO

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### OUR VISION

Building a stronger community as the premier organization serving donors and nonprofits in our region by providing expert philanthropic leadership.

### OUR MISSION

To lead informed, effective, and innovative giving that achieves positive change in the communities we serve.

### WE ACCOMPLISH THIS THROUGH

- Coordination
- Education
- Facilitation
- Convening
- Research
- Advocacy
- Engagement
- Evaluation

### OUR VALUES

- Accessibility
- Integrity
- Inclusivity
- Optimism
- Transparency
- Excellence



## STRENGTHEN NONPROFIT COMMUNITY

OBJECTIVES	TACTICS	GOALS FOR SUCCESS
<p>LEAD EFFORTS THAT SUSTAIN OUR NONPROFITS AND ALLOW THEM TO FULFILL THEIR MISSIONS</p>	<ul style="list-style-type: none"> <li>» Grow our Nonprofit Capacity Building initiative - now in its second year               <ul style="list-style-type: none"> <li>• Create a process to evaluate current and future initiatives that will determine potential impact on the community and how to decide whether or not to pursue specific initiatives</li> </ul> </li> <li>» Conduct research to determine a second initiative with the assistance of an OCF Board Initiative Committee and community partners               <ul style="list-style-type: none"> <li>• Evaluate what other community foundations are doing nationally</li> <li>• Conduct a study to understand our existing donors' interests and priorities</li> <li>• Conduct annual community needs research to identify challenges and resources</li> <li>• Consider existing or imminent projects that might address identified needs</li> </ul> </li> </ul>	<ol style="list-style-type: none"> <li>1. Expand services designed to enhance and better evaluate the effectiveness of local nonprofits</li> <li>2. Grow knowledge base and skills of our staff to deliver constructive services to nonprofits</li> </ol>
<p>OFFER MORE NONPROFIT SERVICES</p>	<ul style="list-style-type: none"> <li>» Create lists of external resources to support nonprofit interest in start-up guidance, fundraising resources, marketing resources, success indicators, board development, and in-kind gift placement</li> <li>» Develop start-up consulting, capacity building consulting, and performance evaluation consulting for nonprofits</li> <li>» Define and enhance services available to nonprofits with agency endowments accounts</li> <li>» Offer fiscal agency services to organizations without the IRS public charity status</li> </ul>	
<p>EVALUATE OUR GRANT PROGRAMS TO ENSURE EFFECTIVE AND EFFICIENT GRANTMAKING</p>	<ul style="list-style-type: none"> <li>» Expand our capacity to effectively and objectively evaluate nonprofits by leveraging national resources and experts</li> <li>» Create online access to information on local nonprofit operations</li> </ul>	



## BRING PEOPLE TOGETHER FOR A STRONGER IMPACT

OBJECTIVES	TACTICS	GOALS FOR SUCCESS
<p>MATCH DONORS TO GIVING OPPORTUNITIES WITHIN THEIR AREAS OF INTEREST</p>	<ul style="list-style-type: none"> <li>» Improve our existing giving plan and philanthropic interest survey to more effectively identify the interests of donors</li> <li>» Create more targeted communications based on donor preferences</li> <li>» Expand our depth of knowledge through commissioned research and national resources</li> <li>» Create opportunities for likeminded donors to connect – both in-person and online</li> <li>» Host forums to discuss actionable items addressing donor interests and community needs</li> <li>» Make information on local needs more accessible through new and existing communication channels</li> <li>» Increase overall grantmaking by \$10 million per year</li> </ul>	<ol style="list-style-type: none"> <li>1. Prioritize 4-6 donor interest areas to address as a community</li> <li>2. Create 3 giving circles for accessible collective giving</li> <li>3. Grow grants issued to \$100 million annually</li> <li>4. Increase the number of gifts made as a result of community needs matched with donor interests</li> <li>5. Grow use of online services as identified through traffic and click through rates</li> <li>6. Increase engagement in events designed to address community needs</li> </ol>
<p>CREATE OPPORTUNITIES THAT FOSTER A STRONGER SENSE OF COMMUNITY AROUND GIVING</p>	<ul style="list-style-type: none"> <li>» Reach a more diverse audience of donors through community interest funds that address timely community needs and giving circles that offer a collective giving experience</li> <li>» Develop an online presence that allows us to connect to more donors, nonprofits, and the community using social media tools</li> <li>» Create a giving gift card program</li> </ul>	



## EXPAND GIVING OPPORTUNITIES TO GROW PHILANTHROPY

OBJECTIVES	TACTICS	GOALS FOR SUCCESS
<p>OFFER GIVING SERVICES TO MORE PEOPLE AND ORGANIZATIONS</p>	<ul style="list-style-type: none"> <li>» Grow the number of individuals giving through the Foundation</li> <li>» Offer more services to donors that further their charitable efforts               <ul style="list-style-type: none"> <li>• Promote legacy giving options</li> <li>• Expand philanthropic services to help donors effectively conduct their giving</li> <li>• Create basic guidelines for donors to use when evaluating giving opportunities</li> <li>• Offer more grantmaking services that include grantmaking evaluation, online research of local nonprofits, international grant making services, and charitable advising</li> </ul> </li> <li>» Ensure that all donors are completely satisfied with our services               <ul style="list-style-type: none"> <li>• Implement a system of surveys to evaluate our services, donors' perception of OCF, and why donors choose to work with us</li> <li>• Improve internal work processes to improve accuracy and efficiency</li> <li>• Turn all problem resolutions into opportunities to strengthen donor relationships</li> </ul> </li> <li>» Build stronger relationships with professional advisors that refer clients to the Foundation               <ul style="list-style-type: none"> <li>• Develop more opportunities to engage with advisors through presentations and communications</li> <li>• Create customized giving materials for advisors to use with their clients</li> </ul> </li> </ul>	<ol style="list-style-type: none"> <li>1. Grow donor base by 75%</li> <li>2. Increase transparency of local nonprofit information available online</li> <li>3. Increase the number of families participating in family giving</li> <li>4. Increase advisor referral base by 50%</li> <li>5. Increase donor referrals by 10% annually</li> <li>6. Diversify sources of earned revenue and add Let Good Grow annual appeal</li> </ol>
<p>ENGAGE NEXT GENERATION OF PHILANTHROPISTS TO CONTINUE OMAHA'S TRADITION OF GIVING</p>	<ul style="list-style-type: none"> <li>» Promote family giving that starts at any age and with any amount</li> <li>» Improve existing Youth in Philanthropy program which teaches youth to be philanthropic leaders</li> <li>» Grow Omaha Venture Group to engage more young professionals and grassroots nonprofits</li> </ul>	