

Omaha Community Foundation
2014-2016 Strategic Plan Results

	2014	2015	2016 ¹	Progress Over Time	End of Plan Goal	Progress to Goal
DONOR GROWTH						
Donor growth over plan	135	121	130		430	
Net new donors under age 50	32%	33%	37%		50%	
New accounts from current donors over plan	23	24	24		70	
Planned gifts over plan	23	28	36		78	
Planned gift estimated value	\$10,885,005	\$136,872,194	\$239,400,000		N/A	
Referring advisor base	207	242	276		260	
NONPROFIT INVESTMENT						
Nonprofits confirm OCF builds capacity (cohort; OG)	100%; process to track	100%; 73%	100%; 70%		60%	
Total grant distribution rate	17%	16%	14%		10-20%	
Total grants	\$172,891,258	\$160,131,268	\$140,000,000-est		N/A	
Funds flowing to designated needs			Process developed; Landscape launched		Process developed	
OMAHA GIVES						
Nonprofits participating	569	704	789		N/A	
Unique individuals participating	18,112	20,684	18,915		30,000	
Funds raised	\$6,360,707	\$8,867,886	\$8,991,517		N/A	
New gifts		\$885,000	\$1,036,378		N/A	
First time donations	47%	46%	33%		50%	
Average donation per donor	\$304	\$381	\$421		N/A	
FINANCE + OPERATIONS						
Assets	\$1,015,727,944	\$982,826,537	\$1,006,000,000		\$1,000,000,000	
Manage the budget (% actual expenses to budget)	87%	94%	95%		100% or less	
Realized revenue	\$2,869,992	\$3,270,621	\$3,757,420		N/A	
Operating reserve target	on target	on target	on target		maintain per policy	
Cumulative digital users	33,002	38,357	56,884		52,500	
Board participation in CEO review	90%	79%	100%		90%	
Cultural health	87%	84%	89%		90%	

¹ 2016 unaudited results