# Communities of Coastal Georgia Foundation Final Strategic Planning Report

April 2025

Prepared by Libby Cole, Expand Coaching and Consulting

Communities of Coastal Georgia Foundation

Expand Coaching and Consulting

# Final Strategic Planning Report: Communities of Coastal Georgia Foundation (CCGF)

**Prepared by:** Libby Cole
**Date:** April 23, 2025

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## Introduction

This report serves as a final assessment and summary of the Communities of Coastal Georgia Foundation's 2025–2029 strategic planning process. It highlights board engagement, leadership feedback, refined priorities, KPIs, and implementation structures developed collaboratively over the course of several months.

## Context and Objectives

Since August 2024, CCGF has undertaken a strategic planning process with three core objectives:

1. Bring all stakeholders up to speed on past progress and foundational history.
2. Review, refine, and finalize the mission, vision, and values.
3. Achieve consensus around bold and actionable priorities, and define goals with measurable outcomes.

| Date | Milestone / Activity |
|---|---|
| **August 2024** | Initial planning discussions with staff |
| **September 2024** | Stakeholder survey launched (43+ responses gathered) |
| **October 3, 2024** | Executive Committee briefing on survey results |
| **October 15, 2024** | Full board strategic visioning session:<br>• Reviewed survey findings<br>• Drafted updated mission/vision<br>• Discussed strategic priorities |
| **November 2024** | Stakeholder interviews & input |
| **December 2024** | Small group conversations and insight gathering |
| **January 16, 2025** | Board Meeting: reviewed priorities and plan |
| **February 2025** | Executive Committee Meeting: approved mission/vision and set strategic priorities, 1:1 consultations to refine content and board dynamics |
| **March 2025** | Executive Committee meeting: drafted goals, staff began action plans, KPIs, and accountability framework |
| **April 2025** | Final review of full draft strategic plan + board engagement resources |
| **April 17, 2025** | Final board meeting and plan approval |
| **May–June 2025** | Launch plan<br>Begin implementation:<br>• Staff alignment<br>• Board “playbook” shared<br>• KPI dashboard launched |
| **August 2025** | Begin quarterly progress monitoring and board updates |
| **January 2026** | First annual strategic review: assess KPIs, make adjustments, prepare Year 2 work plan |

## Stakeholder Survey Results

As part of our strategic planning process, a stakeholder survey was conducted to gather input from key individuals connected to the Communities of Coastal Georgia Foundation, including fundholders, nonprofit representatives, board members, and community members. This survey was designed to capture insights on how the Foundation is perceived, identify areas for improvement, and explore opportunities for growth.

The feedback received was critical in helping us align our strategic priorities with the needs and expectations of our stakeholders as we developed the strategic plan. It provides a clearer understanding of our internal strengths and challenges, as well as external opportunities and threats that may impact our future direction.

# METHODOLOGY

The stakeholder survey was conducted to gather comprehensive feedback from key individuals and groups connected to the Foundation. This section outlines the process used to design, distribute, and analyze the survey.

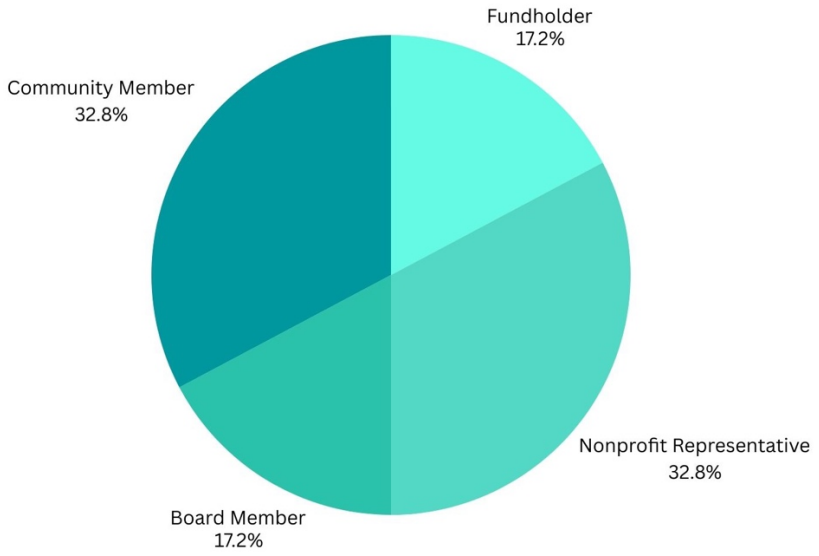
The survey was developed to ensure that it captured a broad range of perspectives across various aspects of the Foundation's work, including internal operations, external impact, and future opportunities. It included a mix of quantitative questions (using a Likert scale) and open-ended questions to allow respondents to provide detailed feedback.

The survey was distributed via Google forms to fundholders, nonprofit representatives, board members, and community members. The survey was open for ten days. Responses were analyzed using both statistical methods and qualitative coding for recurring themes.

Respondents were able to self-identify their roles with the Foundation on the survey. A total of 46 individuals completed the survey, 12 of whom completed responses for two roles, for a total of 58 responses across the specific role categories. The response rates are charted below.

| Category | Total Surveys Sent | Total Responses | Overall Response Rate | Category-Specific Response Rate |
|---|---|---|---|---|
| Board Member | 19 | 10 | 0.6% | 52.6% |
| Fundholder | 72 | 10 | 0.6% | 13.9% |
| Nonprofit Rep | 212 | 19 | 1.15% | 8.9% |
| Community Member | 1353 | 19 | 1.15% | 1.4% |
| **Total** | **1656** | **58** | **3.5%** | |

### Stakeholder Respondents:



As part of our follow-up to the stakeholder survey, a select group of respondents was contacted for more in-depth conversations. These phone calls allowed us to clarify some of the feedback provided in the survey and gather additional insights that may not have been fully captured in written responses. By speaking directly with key stakeholders, we better understood the nuances behind their perspectives and gained a deeper appreciation of their concerns, suggestions, and ideas. These conversations helped ensure that the feedback we received was accurately interpreted and effectively incorporated into our strategic planning process, allowing us to make more informed decisions and address stakeholder needs more thoroughly.

## KEY FINDINGS

The following sections present the insights gathered from the stakeholder survey. These key findings reflect the collective feedback from respondents across various stakeholder groups. The data provides valuable insights into the Foundation's current strengths, challenges, and opportunities for growth.

The survey results have been organized according to the flow of questions on the survey, including internal organizational performance, external opportunities and threats, stakeholder role specific engagement, and future strategic priorities. Quantitative data has been supplemented with qualitative responses to provide a more comprehensive understanding of stakeholder perceptions.

### Headline Findings:

- **87%** feel the Foundation is currently meeting its mission well or very well, 13% neutral.
- **84.8%** are satisfied or very satisfied with the current state of the Foundation, 15.2% neutral.
- **100%** of fundholders would recommend CCGF to others.

### Strengths

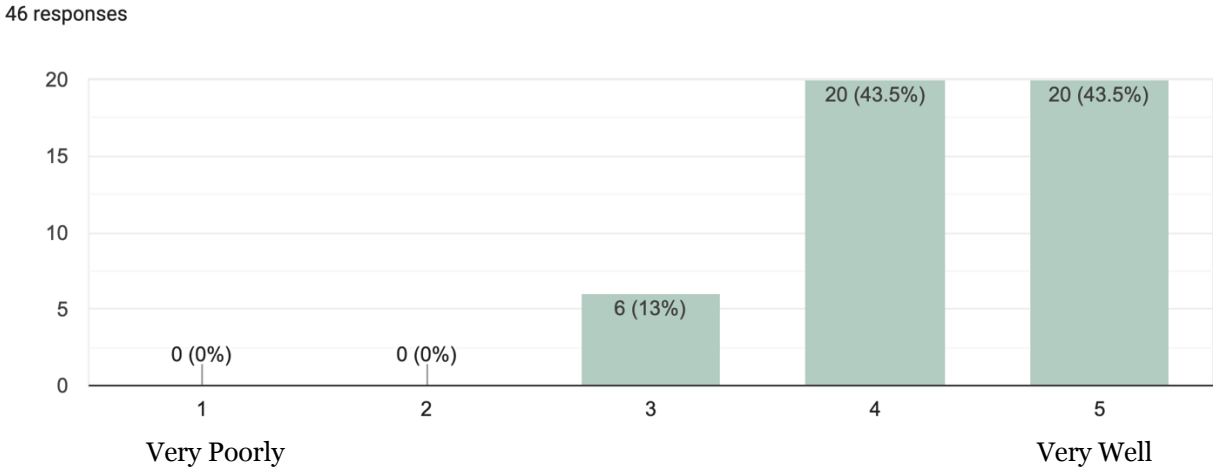
- Staff and board leadership
- Reputation of the Foundation in the community
- Community involvement and relationships
- Satisfied fundholders and stakeholders

### Opportunities for Improvement

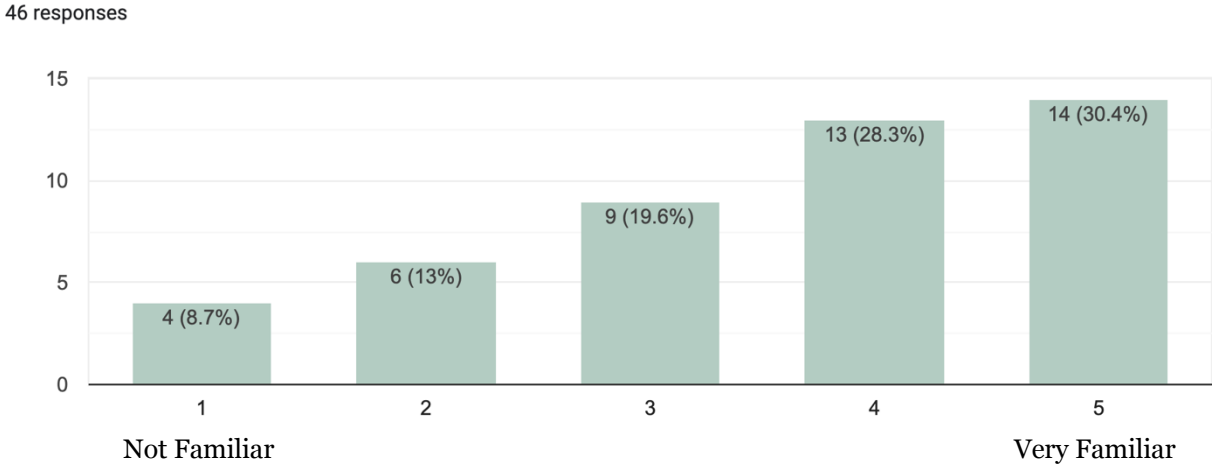
- Community education and awareness
- Communication and marketing
- Recruitment of new fundholders and resources

# INTRODUCTORY QUESTIONS – 46 responses

## How well do you feel the Foundation is currently meeting its mission?




## How familiar are you with the Foundation's current strategic goals?

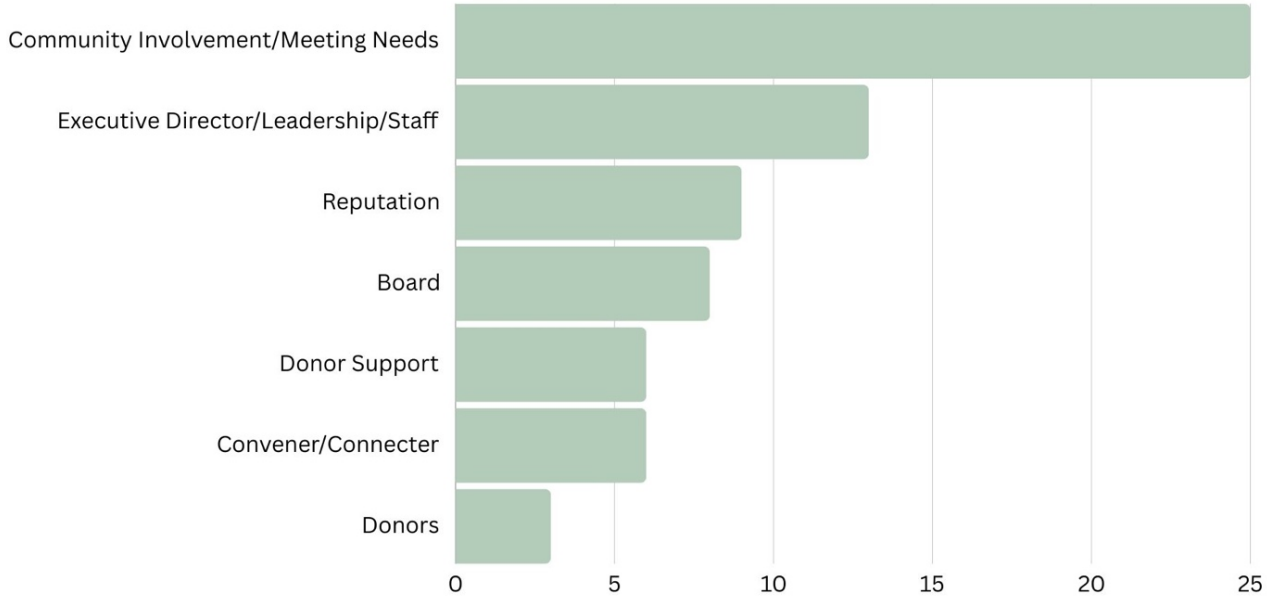


## What does the phrase "engaged philanthropy" mean to you?

Select direct responses:

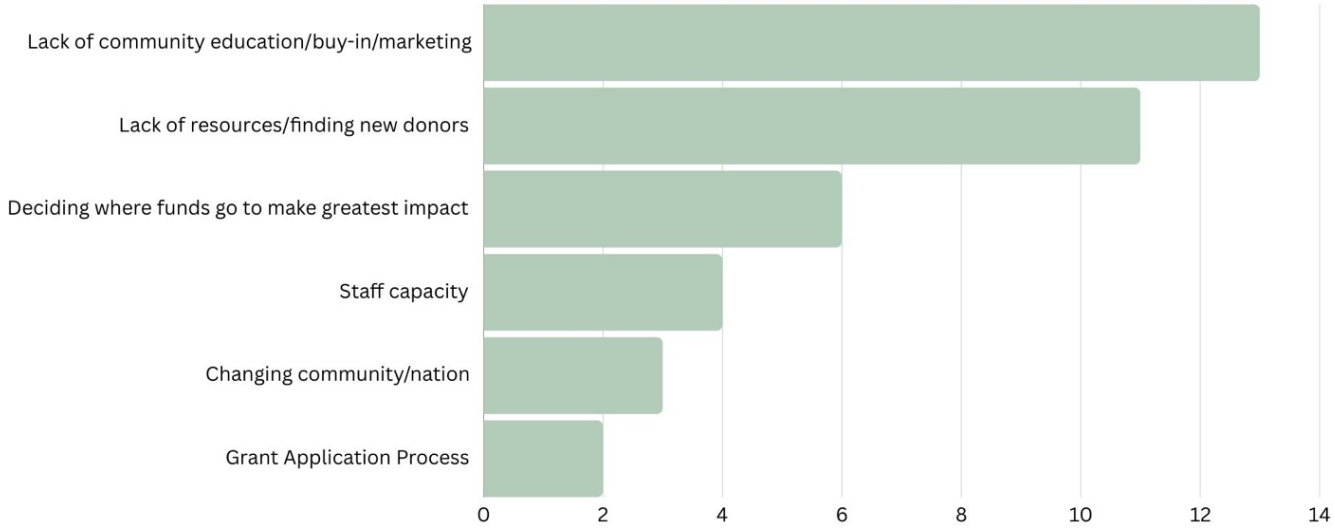
- “Help and impact by actual engagement rather than merely via funding”
- “Pro-active; playing a part in finding and implementing solutions to community issues not needs; convening the community to stimulate community wide consensus; serving as more than just a pass-through of funds.”
- “Donor-Foundation relationship & communication that informs donors & moves foundation goals forward through time, talent & treasure.”
- “An active role in making a difference, not just through financial support but by deeply understanding the causes you care about. It’s about building relationships with organizations, listening to community needs, and using your skills and connections to create a greater impact.”
- “'Engaged Philosophy' makes a difference in the wider world, by engaging on a practical level with real-world problems and by bringing philosophy to an audience beyond academia.”
- “Philanthropy that is meaningful and measurable- working in partnership with grantees - sustainable - Encouraging fundholders to support issues of regional importance - intentional giving with expected success”

## In your opinion, what are the Foundation's greatest strengths?



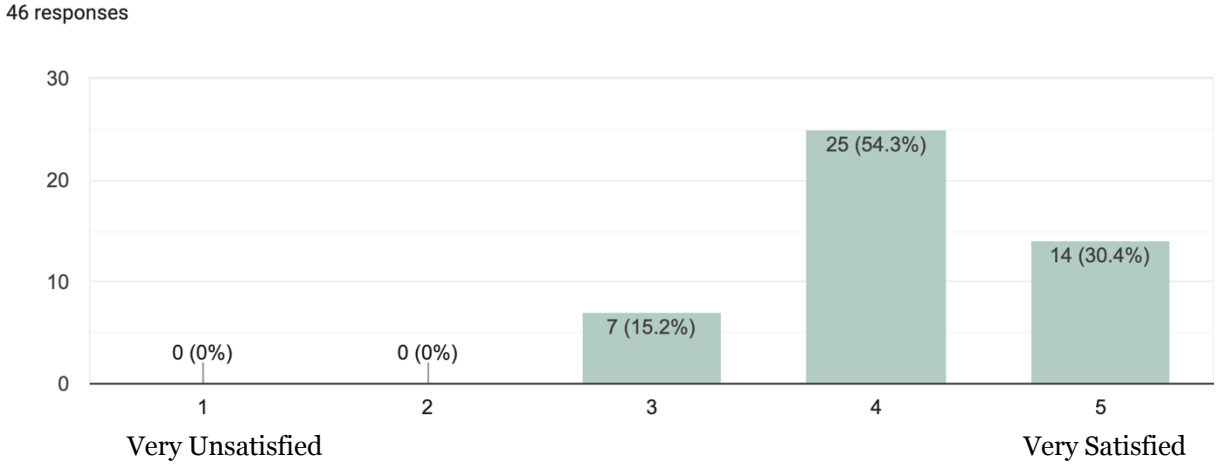

Other singular responses: The amount of resources available, Cross Pollination, directed energy, compounded impact

## What do you perceive as the Foundation's biggest challenges or weaknesses?




Other singular responses: Risk aversion, lack of unity in how to achieve vision among board members, not having a clear purpose

## Overall, how satisfied are you with the current state of the Foundation?

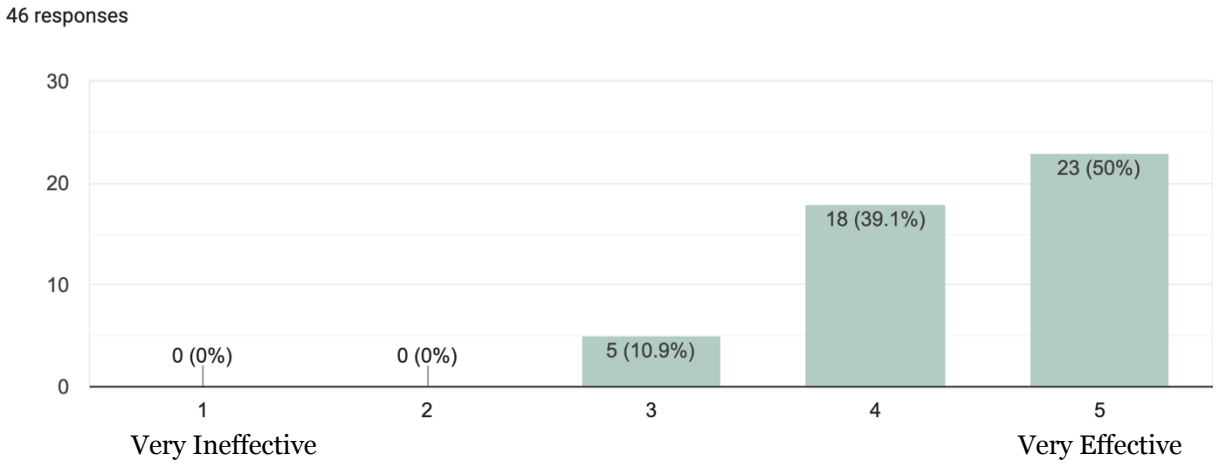


## INTERNAL ENVIRONMENT – 46 responses

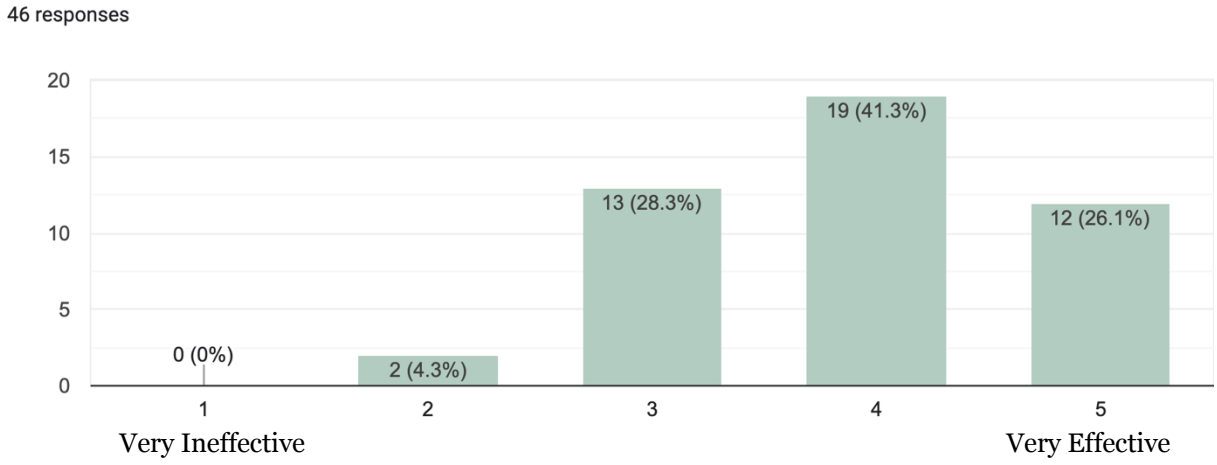
This section focuses on feedback related to the Foundation's internal operations, capabilities, and organizational culture. The survey responses provided insights into our strengths, as well as areas where improvements may be needed. Key topics included leadership effectiveness, staff capacity, resource management, and overall organizational performance.

Understanding how stakeholders perceive our internal environment is crucial for ensuring that we are operating efficiently and are well-positioned to achieve our mission. The following findings will help us identify where we excel and where we may need to strengthen our internal capacity to better meet future challenges and opportunities.

### Leadership from President & CEO

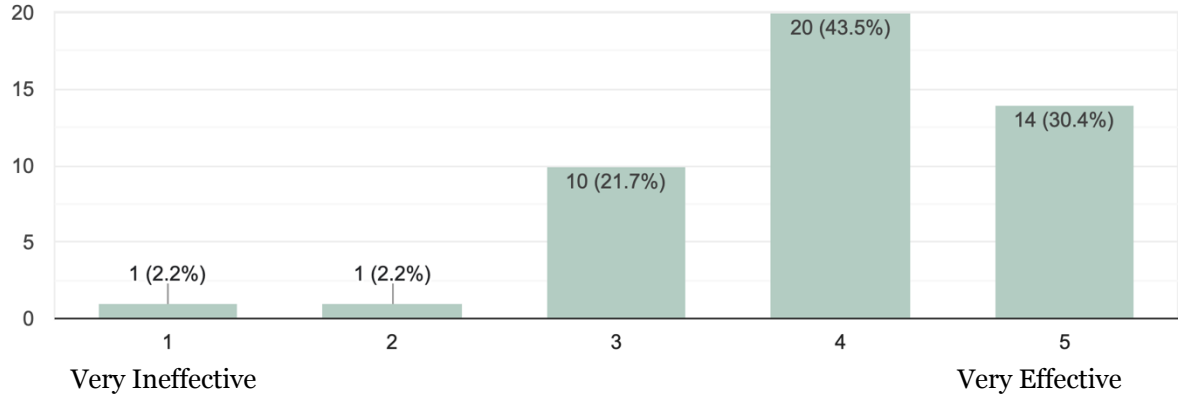



### Leadership from Board of Directors



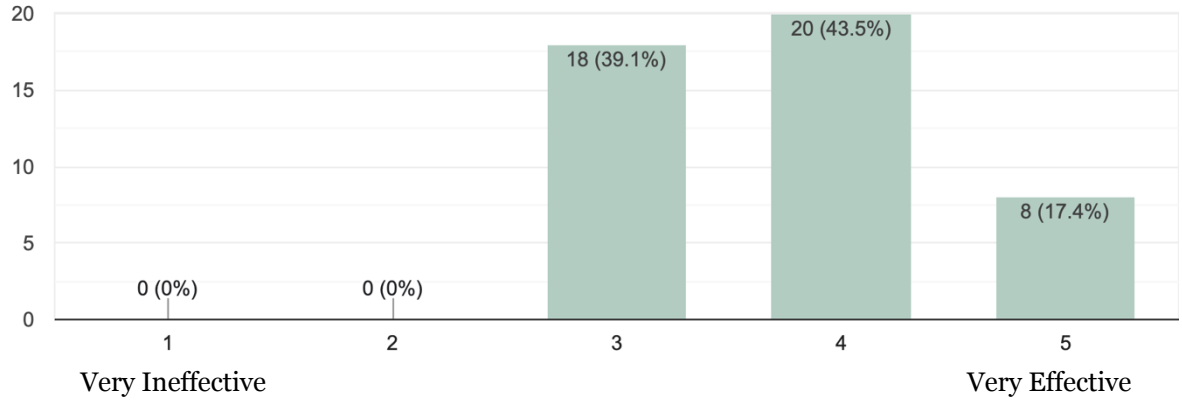
## Staff Capacity

46 responses



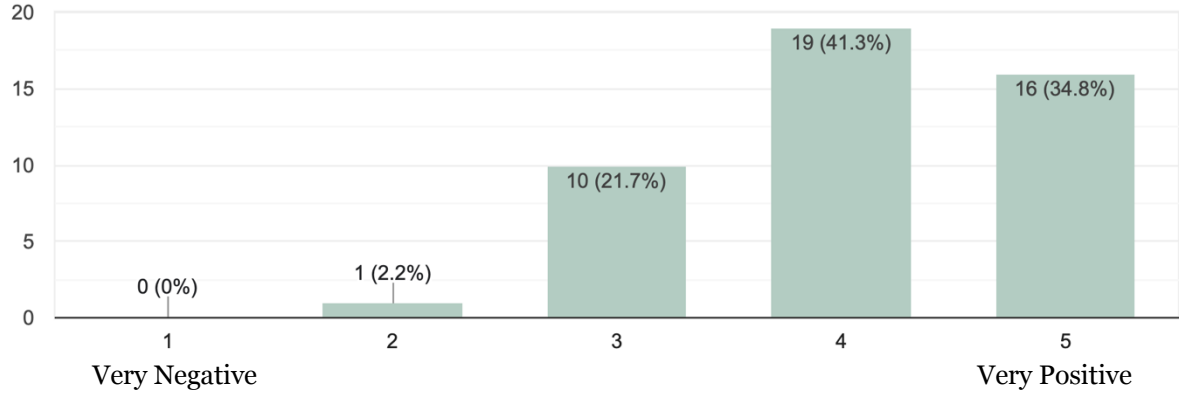

## Resources and Funding

46 responses

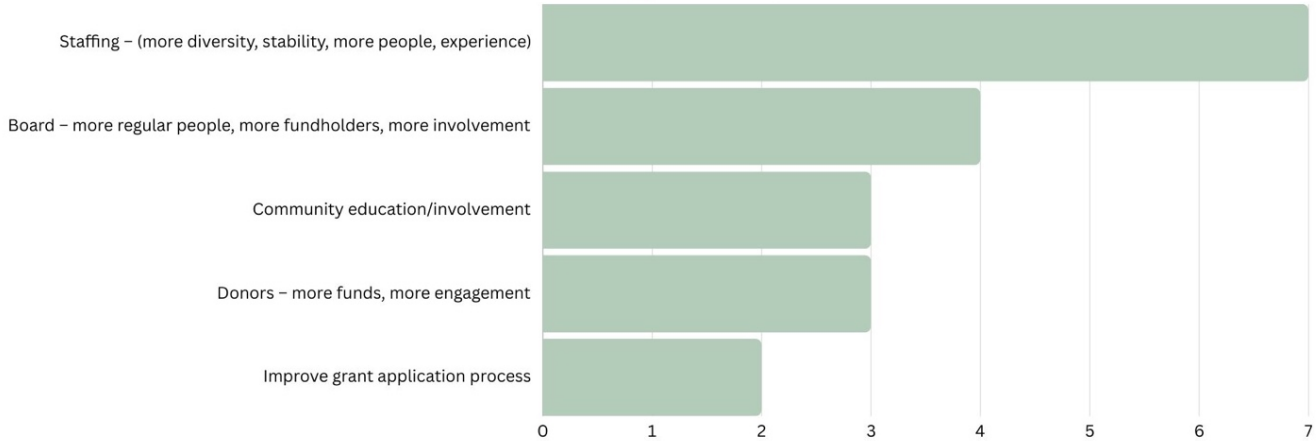



## Organizational Culture

46 responses



## What internal improvements could make the Foundation more effective?




*24 responded that either no improvements needed to be made or they did not have enough information to provide suggestions.

## EXTERNAL ENVIRONMENT – 46 responses

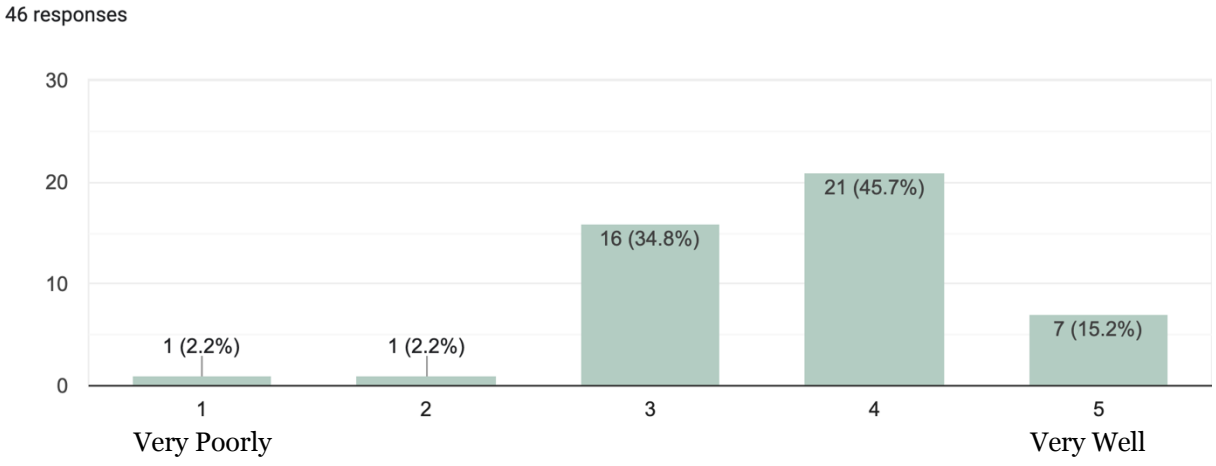
This section addresses the external factors that may impact the Foundation, including trends, opportunities, and challenges in the broader community and nonprofit landscape. The survey gathered stakeholder perspectives on how well the Foundation is responding to these external forces and what potential risks or opportunities lie ahead.

From shifts in funding patterns to emerging community needs, these external insights are critical for shaping our strategic direction. Understanding the landscape in which we operate allows us to adapt effectively, leverage new opportunities, and mitigate potential threats. The following key findings provide a look at how stakeholders view the external environment and its influence on the Foundation's future success.

### Which external trends do you believe will have the most significant impact on the Foundation over the next 3-5 years? (Respondents could select up to 3)

1. Economic conditions (local shifts, economic downturns, income disparity) – 78.3%
2. Funding trends (change in donor preferences, increased competition for funding) – 60.9%
3. Political or regulatory changes (tax policy, new laws or regulations, social services funding) – 45.7%
4. Social or cultural trends (changing demographics, focus on equity and inclusion) – 37%
5. Environmental factors (climate change, sustainability initiatives) – 26%
6. Public Health trends (pandemics, mental health recognition) – 19.6%
7. Technological advancements (automation and AI, digital impact, cybersecurity risks) – 8.7%

### How well does the Foundation currently respond to changes in the external environment?



## What external opportunities should the Foundation explore?

Select direct responses:

- “Adverse impact of rising sea levels to coastal communities.”
- “Policy advocacy. Maybe start to work with more of the local governments to influence policies that support sustainable development in the region.”
- “As a retired healthcare professional, I believe that mental health (availability and affordability) is a major concern for our region.”
- “Partner with management teams to train and support local organizations. Assist with developing strong boards for them.”
- “Engaging and connecting local nonprofits to combine efforts to not duplicate services. Coordinating and organizing a larger ask of a foundation or governmental funder.”
- “Support for innovative development policies and tax incentives to improve quality of life and environmental justice, including preparation of policy proposals for review by state legislative study committees.”
- “Broadening our geographic footprint”

## What external threats should the Foundation be aware of?

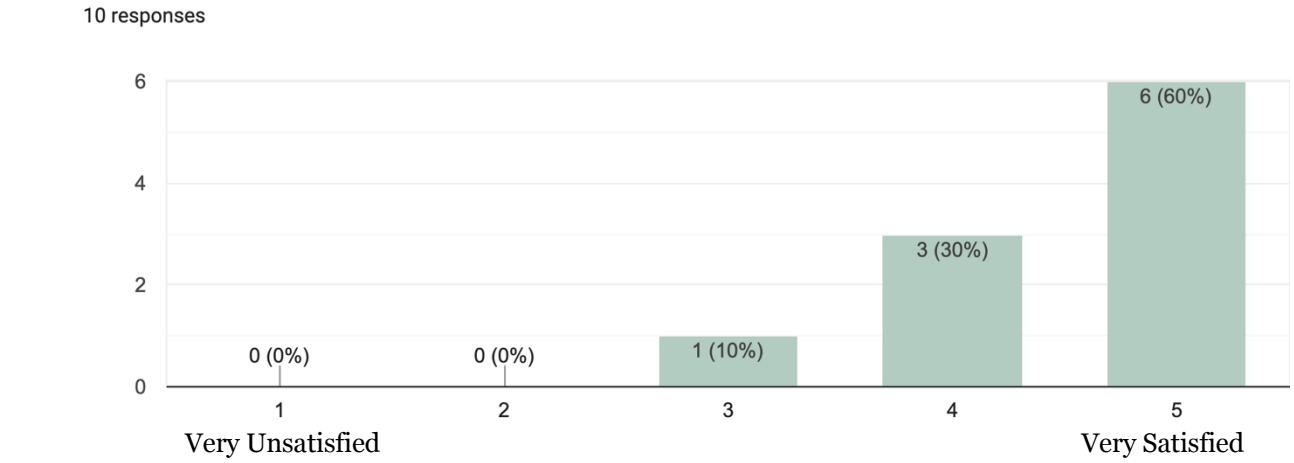
Select direct responses:

- “Other areas that yield higher dividends for funds”
- “Too few African American leaders to support boards.”
- “In harder economic times, smaller nonprofits are struggling and the need is greater.”
- “The current volunteer and donor community is aging, and there will be a void in leadership if the next generation does not become engaged in giving and volunteer leadership. Established charitable organizations may dissolve without a succession plan for leadership and funds for long term sustainability.”
- “Foundation being viewed as political. The foundation being viewed as only interested in " it's own image" not as a community uniter.”
- “the population increase predicted for our area”
- “Technology - security breaches - becoming associated with issues that may be considered political”

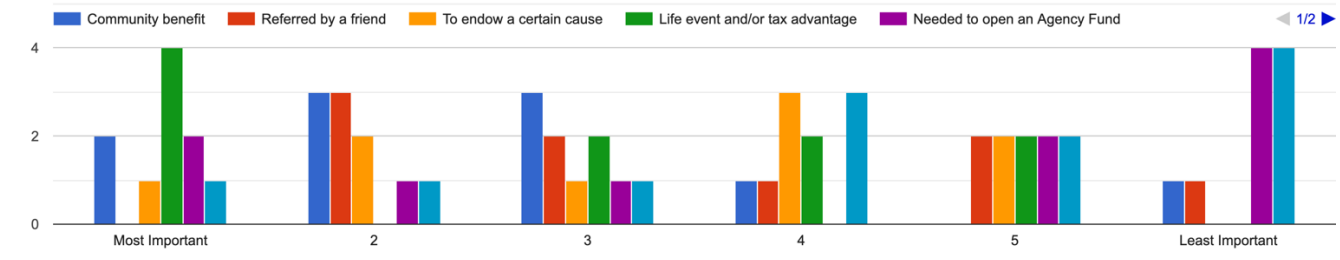
## FUNDHOLDERS – 10 responses

The feedback from our fundholders provided essential insights into how well the Foundation is serving those who have entrusted us with managing their charitable funds. Fundholders shared their perspectives on the Foundation's performance in stewarding their investments, supporting their philanthropic goals, and communicating impact. Understanding the satisfaction and concerns of our fundholders is critical, as their continued trust is key to our long-term sustainability and growth. The following findings highlight the key themes and areas of focus raised by this important group.

### How satisfied are you in the way your philanthropic goals are being met through the Foundation?

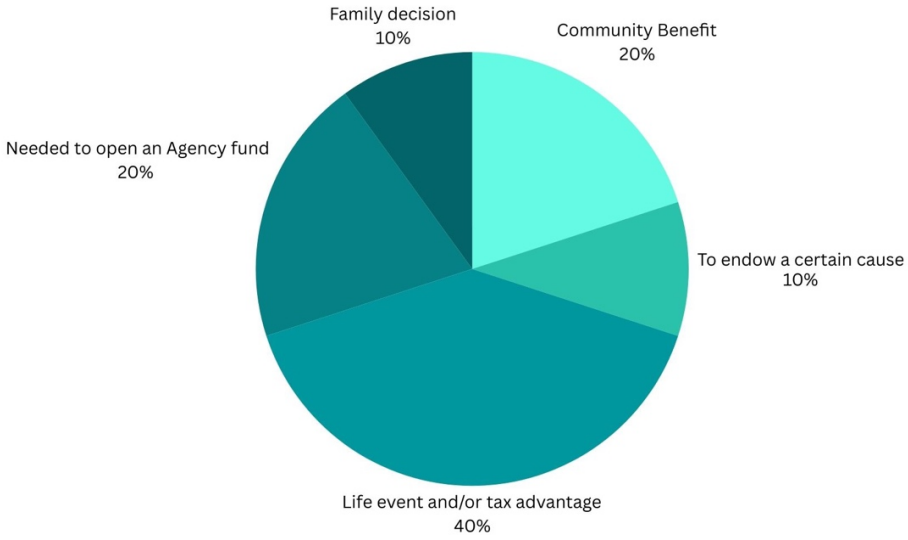



### Please rank your reasons for opening a fund with the Foundation.

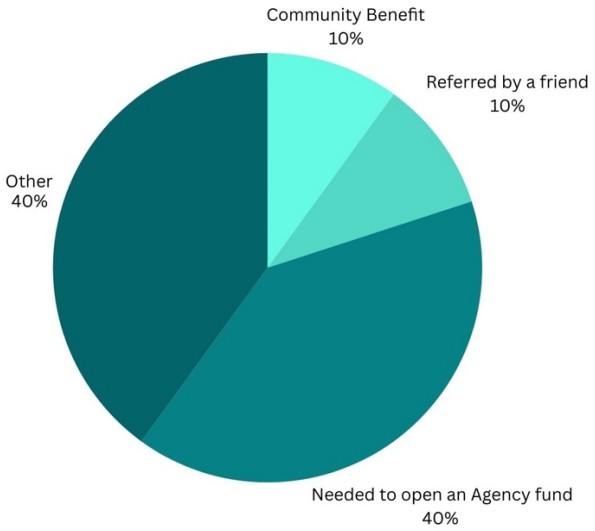



Other: Other: family decision

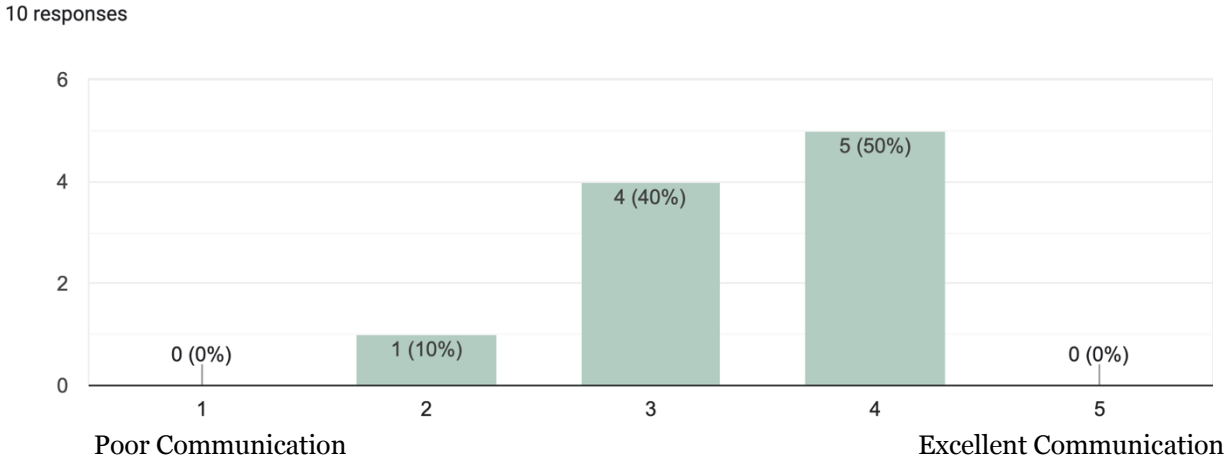
## Most important reasons to open a fund with the Foundation:



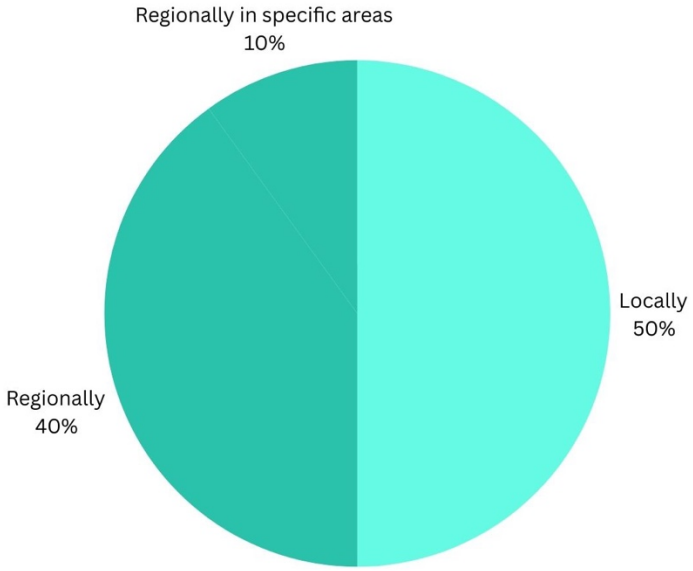

## Least important reasons to open a fund with the Foundation:



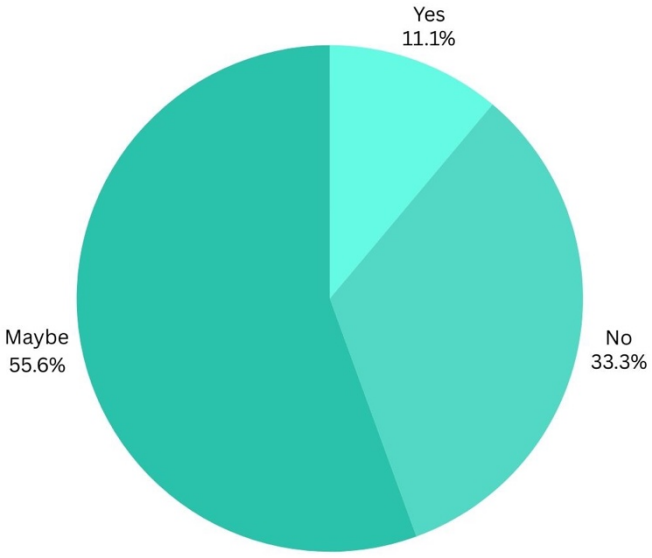

## How do you perceive the Foundation's communication regarding the use and impact of your funds?



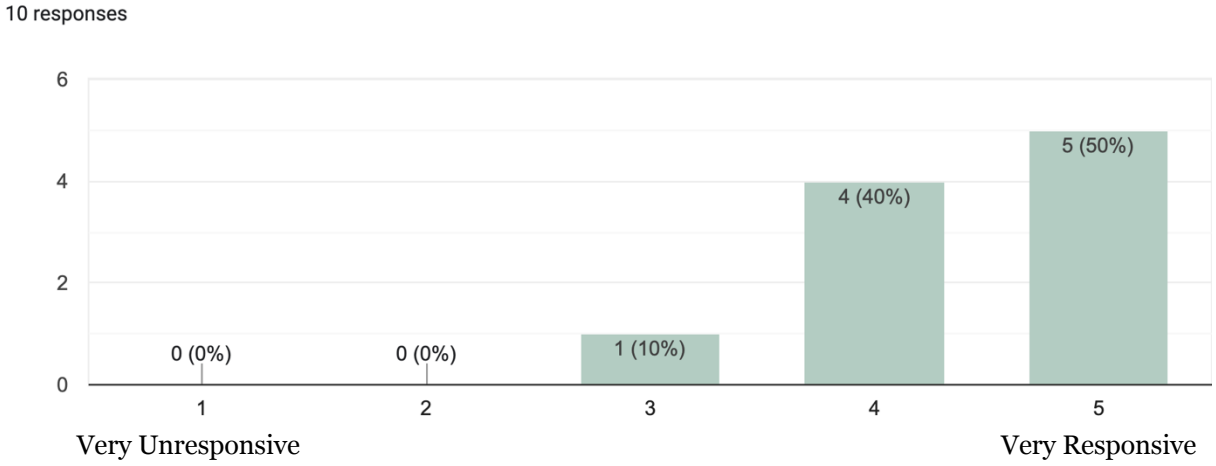
## Do you prefer to grant locally or regionally?



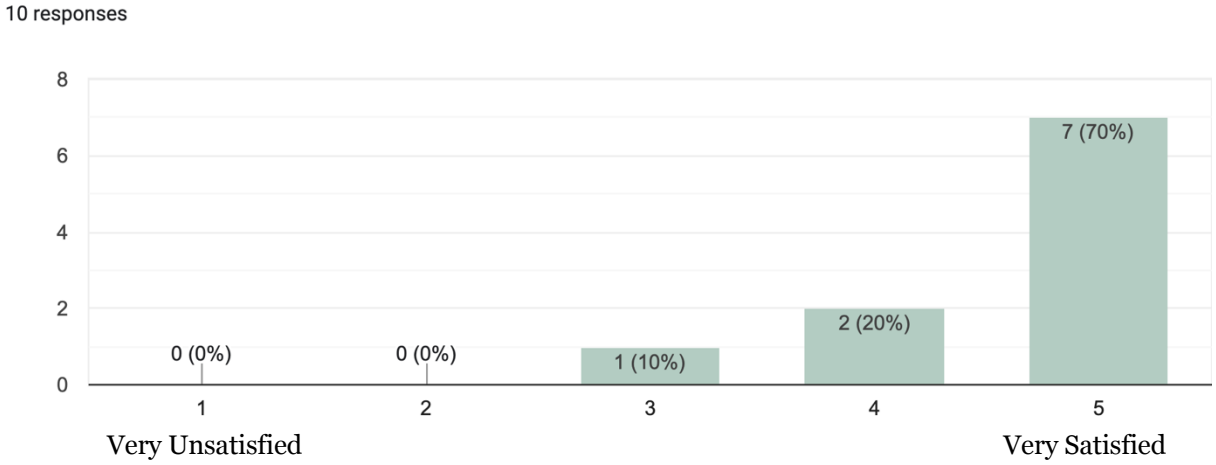

## If you knew having a larger fund would significantly help the Foundation with overhead and operations, would you be inclined to increase the size of your fund?



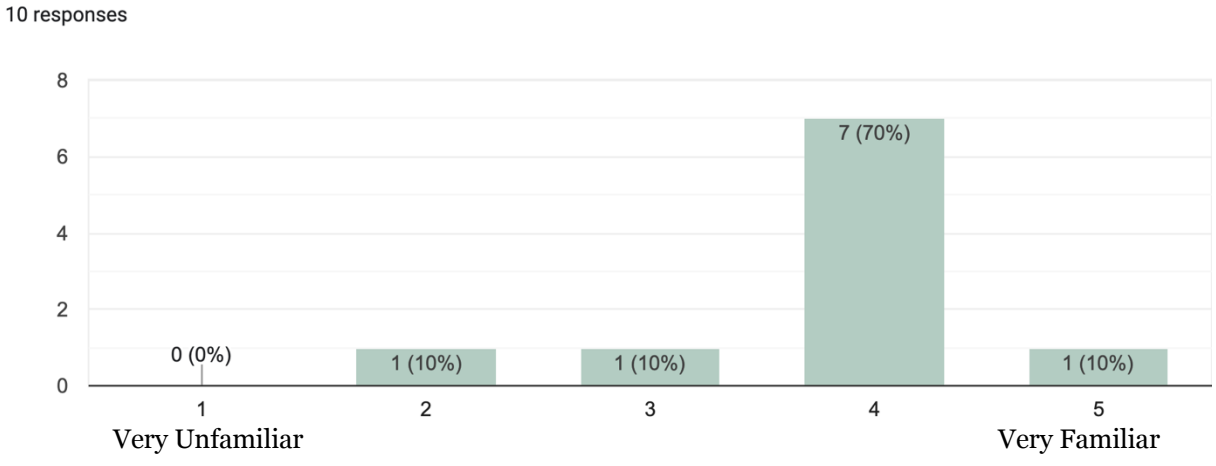
## How responsive is the Foundation to your needs and inquiries?



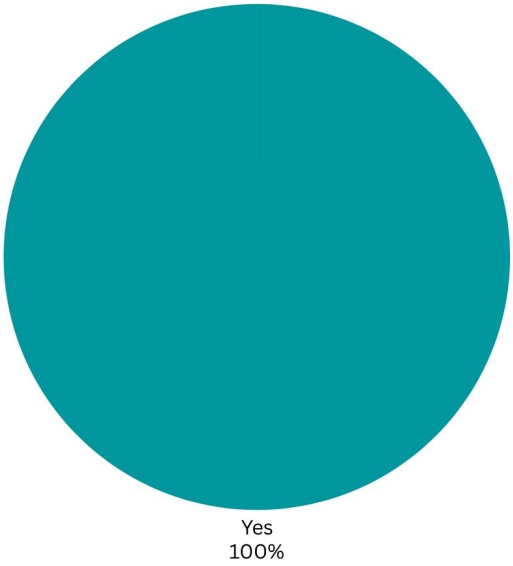

## How satisfied are you with the quality of your relationship with the Foundation's staff?




## How familiar are you with the Foundation's investment policies?



**Would you recommend the Foundation's services to others seeking managed philanthropy?**




**Please elaborate on why or why not in response to the previous question.**

Select direct responses:

- "Well managed"
- "Makes philanthropy very easy and cost effective"
- "Highly relational and professional staff."
- "For a small or newly formed organization with a specific goal, the support offered by the foundation to accept and hold donor funds is unmatched."
- "The foundation is a great tool for folks with a giver's heart"
- "My philanthropy has improved as a result of having a DAF and benefiting from the rigor of validating the effectiveness of services and agencies prior to awarding grants."
- "Because it's an excellent way to become philanthropic at whatever level you're comfortable with, supporting vetted NPs via a well organized, well informed environment."
- "the vetting process of local non profits"

**What is one thing the Foundation could improve to enhance its services?**

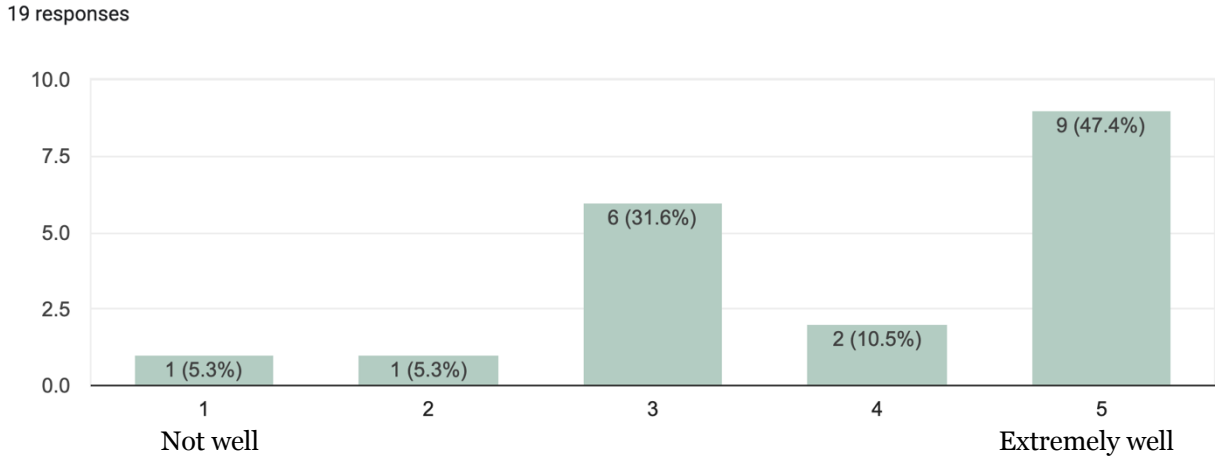
Summary of responses:

- More outreach and communication.
- Maintaining positive relationships and understanding fundholders needs.
- Matching fundholders to agency funds that support interests.

## NONPROFIT REPRESENTATIVE – 19 responses

As partners in our mission to serve the community, nonprofit representatives offered valuable feedback on how the Foundation supports their work. These stakeholders shared their views on our grantmaking processes, collaboration efforts, and how effectively we address the community's needs together. Their insights provide a better understanding of how we can enhance partnerships and improve the impact of our funding. The following section outlines their perspectives, highlighting areas where we can deepen our support and strengthen relationships with the nonprofit sector.

### How well does the Foundation support your organization's mission and work?

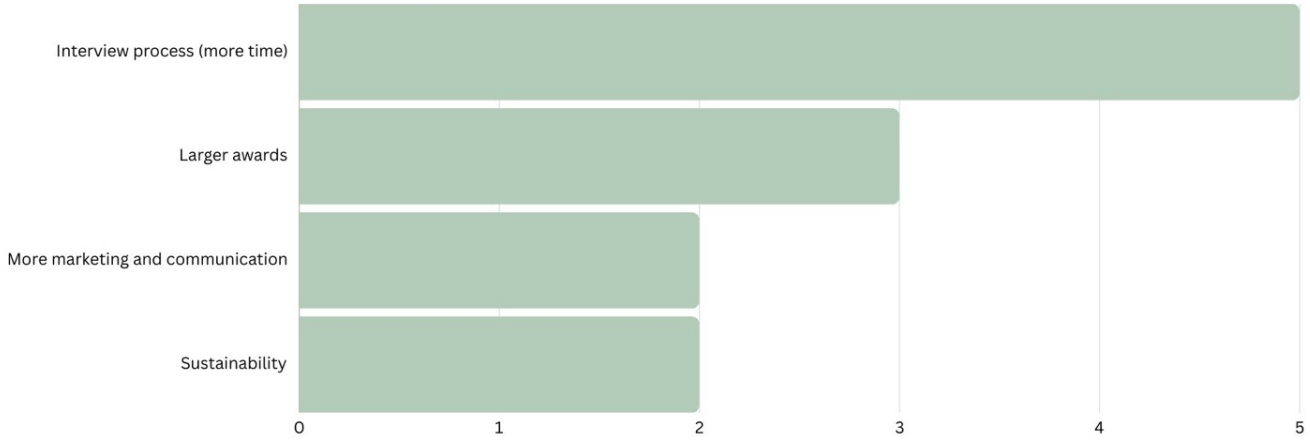



### What challenges do you face in collaborating with the Foundation?

Summary of responses:

- The interview, time constraints
- Not feeling like a priority/competition for resources
- Grants too small
- Crisis opportunities

## How could the Foundation improve its grantmaking process to better meet the needs of nonprofits?




## How could the Foundation better facilitate partnerships and collaboration among nonprofits?

Summary of responses:

- Already doing a great job – more of what it's doing
- Collaborate and listen more
- Help nonprofits work together, continue CEO Roundtables

## BOARD MEMBER – 10 responses

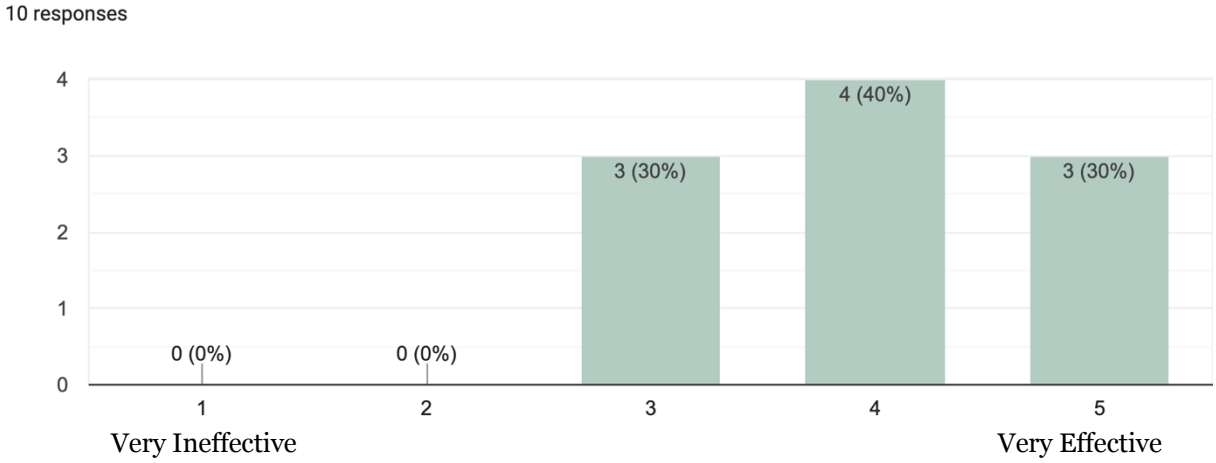
Board members play a vital role in shaping the strategic direction of the Foundation. This section summarizes the insights provided by board members regarding leadership, decision-making processes, and the Foundation's alignment with its mission.

### What strategic opportunities do you see for the Foundation in the next 3-5 years?

**Summary of responses:**

- Grow number of funds and donors
- Expanding footprint
- Education and awareness
- Cohesiveness
- Maximize impact of Anschutz monies
- Emphasis on housing, children, and cooperation

### How effectively is the board working together to guide the Foundation?




### In what ways could the board be better supported to fulfill its governance role?

Summary of responses:

- Strategic planning
- Engagement and active participation
- Reduce size
- Calculated risks

**What challenges do you foresee that could impact the Foundation's strategic direction?**

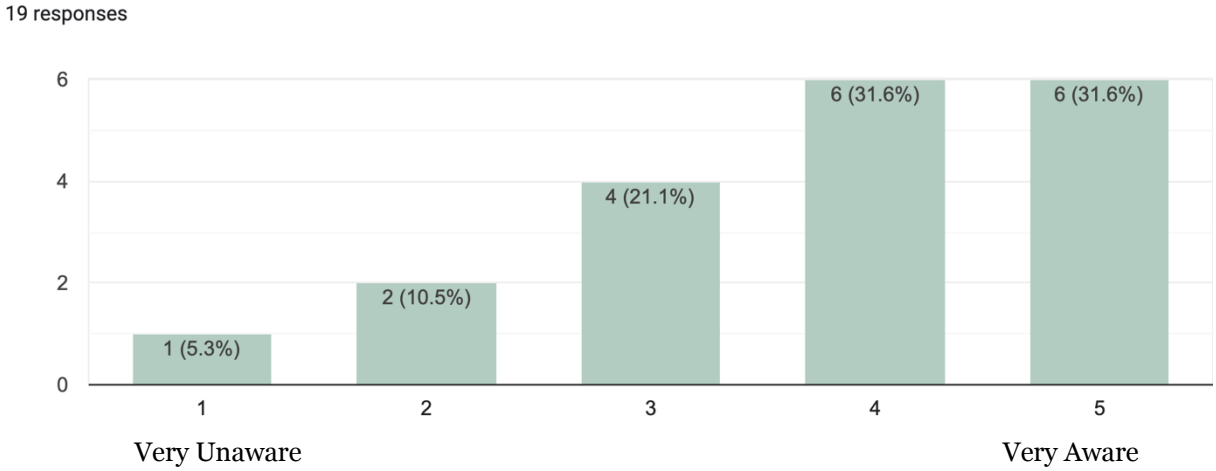
Summary of responses:

- DEI
- Lack of focus
- Economy
- Political landscape
- Commitment
- Need of a compass
- New board members
- Communication
- Competition for donors

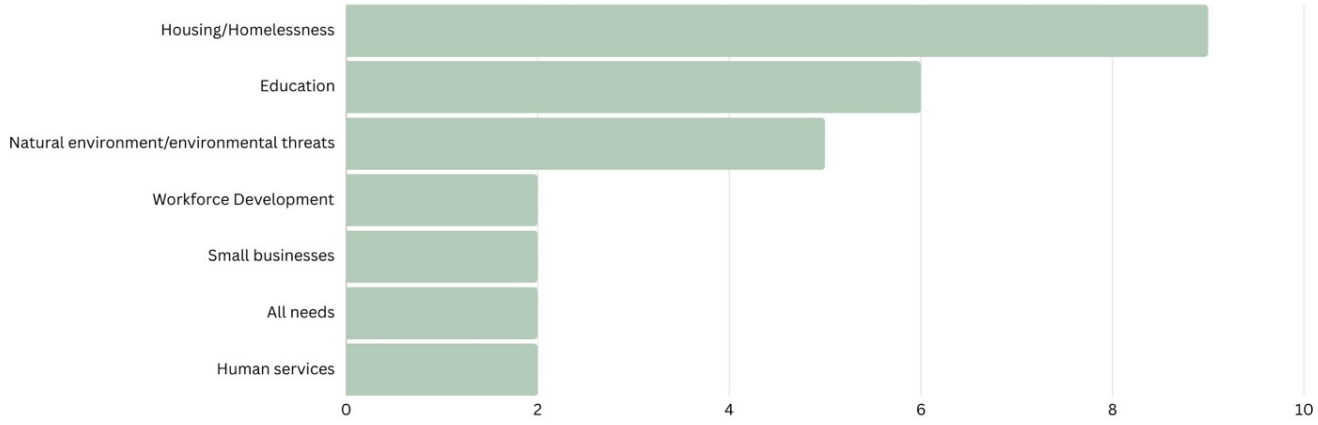
## COMMUNITY MEMBER – 19 responses

As the ultimate beneficiaries of the Foundation's work, community members offered their views on how well we are addressing the needs and challenges within the region. Their feedback focused on program effectiveness, outreach efforts, and the Foundation's overall impact on the community. Listening to community voices is essential for ensuring that our work remains relevant and responsive to those we aim to serve. The following findings highlight how community members perceive our role and offer suggestions for improving our engagement and impact.

### How aware are you of the Foundations work and its impact in the community?

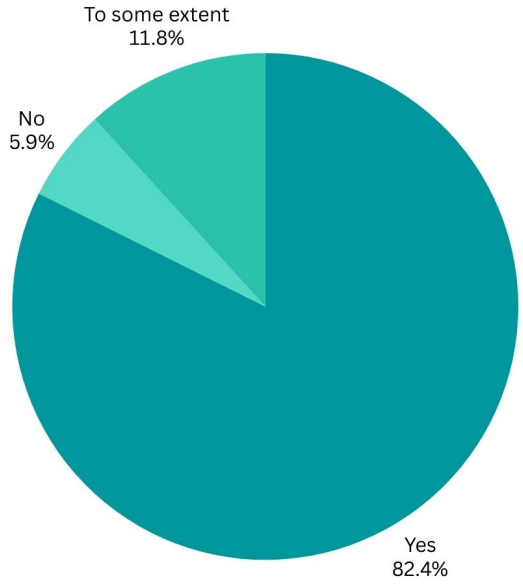



### What community needs do you think the Foundation should prioritize?




Other singular responses: Health, Economic justice, Food deserts, Community Development

**Do you believe the Foundation is accessible and responsive to community concerns?**

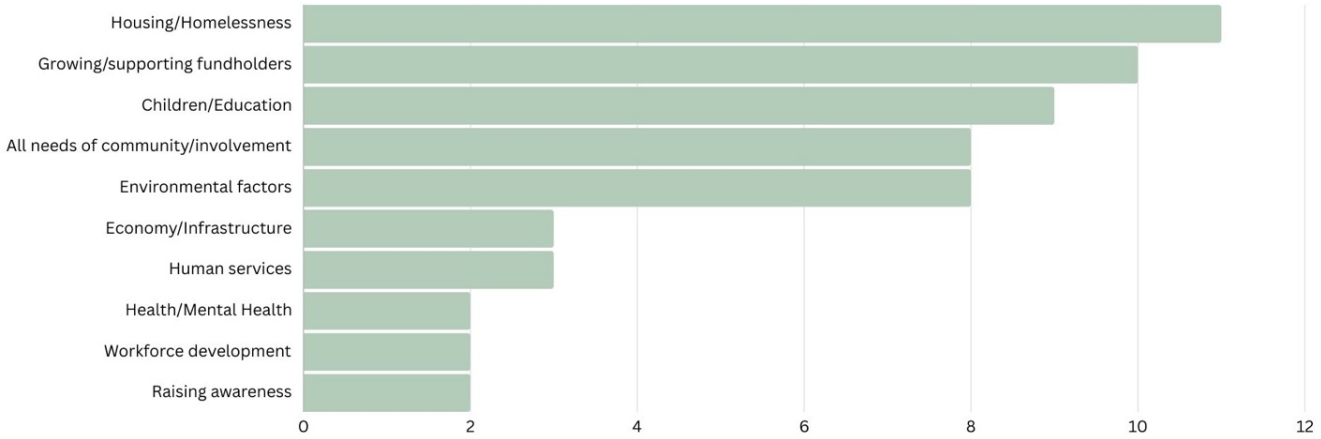


## FUTURE OUTLOOK – 46 responses

As we look ahead, it is essential to align our strategic priorities with the evolving needs of our community and the feedback from our key stakeholders. This section focuses on the perspectives shared by survey respondents regarding the future direction of the Foundation. Stakeholders were asked to reflect on emerging trends, areas for potential growth, and the opportunities they see for us to enhance our impact in the coming years.

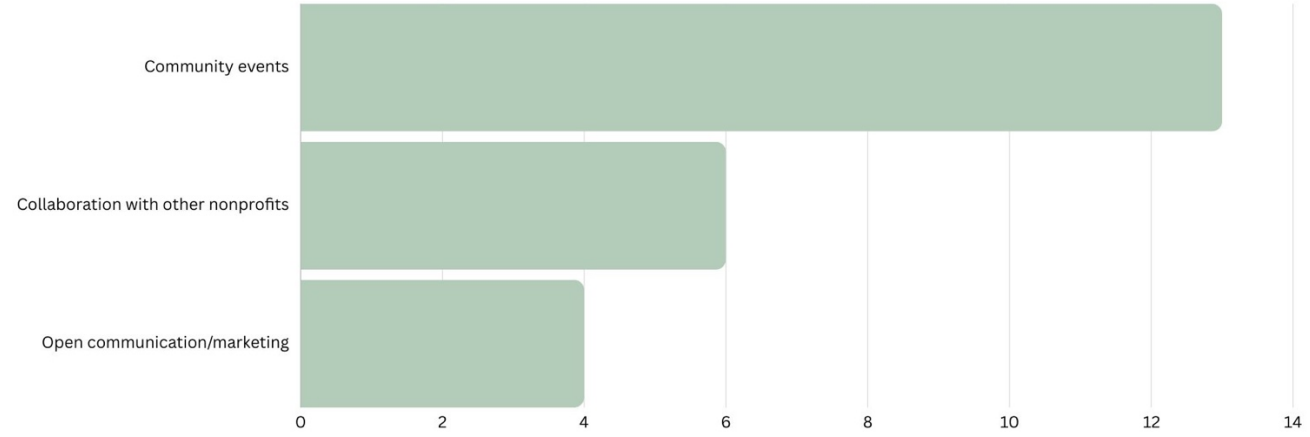
The insights gathered in this section will help us anticipate changes in the external environment, refine our strategic goals, and identify new initiatives that align with our mission. By understanding the collective vision of our stakeholders, we can ensure that the Foundation remains responsive, innovative, and well-positioned to meet future challenges and opportunities.

### In which areas should the Foundation focus its efforts in the future?




Other singular respoonses: Strategic investment, Expanding geographic footprint, Social justice, Resilience

### How could the Foundation more effectively engage with the community and stakeholders?




Other singular responses: Speak with elected officials, create a Community Review Board, connecting donors with organizations who match their needs, broaden accessibility, serve fundholder first, prospecting, meet directly with stakeholders

**Please share any additional thoughts or suggestions you have for the Foundation's strategic planning process.**

Select direct responses:

- "I do believe you have the right President/CEO in place to move the foundation forward in the coming years."
- "Be inclusive with diverse partners and perhaps consider expanding your 'region'."
- "More emphasis on implementation and follow-up, with public reports on outcomes, problems."
- "Great and powerful entity need to leverage resources to get them to frontline and equity should be clearly understood by everyone in organization"

## RECOMMENDATIONS

Based on the insights gathered from the stakeholder survey, there are several key areas where the Foundation can strengthen its impact and align more closely with the needs and expectations of our community. These recommendations are informed by the feedback provided by fundholders, nonprofit representative, board members, and community members. They reflect both opportunities for growth and areas where we can refine our approach to better serve our mission.

The recommendations highlighted below are intended to guide the Foundation's strategic planning efforts for the coming year, focusing on improving internal operations, deepening stakeholder engagement, and exploring new opportunities for collaboration. These suggestions aim to start conversations with the board to ensure that the Foundation remains responsive, forward-thinking, and well-positioned to navigate the challenges and opportunities ahead.

Recommendations:

1. Increase staff capacity
2. Improve communication both internally and externally
3. Expand engagement opportunities for stakeholders
4. Advance donor stewardship and recruitment efforts
5. Facilitate ongoing strategic planning efforts and alignment
6. Implement leadership training and development for staff and board

## Stakeholder Feedback Summaries

**Hillary Stringfellow:** Advocated for a clearer mission, emphasized the Foundation's role in empowering philanthropy over programming, and urged a kickoff mindset for a yearlong strategic process. Highlighted board unification and need for incremental planning with shared leadership.

**Kim Bednarek:** Expressed the need for greater staff capacity and operational support for fund development. Stressed partnership expansion into Southeast Georgia and emphasized CCGF's potential to empower conservation efforts and strategic partnerships.

**Cary Greenfield:** Appreciated improvements in the grant process but emphasized a desire to be seen and heard as a nonprofit partner. Stressed the importance of trust-building and follow-through in board and staff engagement.

**Jack Kilgore:** Highlighted strategic growth opportunities beyond tri-county areas and stressed improving board engagement through more rigorous recruitment. Called for a highly participatory and impactful final plan.

**Don Myers:** Encouraged clearer board accountability within the plan, noting that some goals—especially around financial sustainability—may feel overly ambitious or staff-driven. Recommended revising the language to motivate action and including a "cheat sheet" to help board members connect to strategic priorities.

**Frances Zwenig:** Noted changing giving patterns due to financial planning and recommended improved communication beyond donation requests. Suggested CCGF highlight legacy and maintenance project successes to appeal to community institutions.

**Johnny Bailey:** Requested continued outreach and communication. Valued literacy-focused grants and inclusive programming. Recommended CCGF lean into legacy and community ties.

**Greer Brown:** Emphasized the role of financial advisors in referrals and suggested deeper connections with estate planners. Supported the Foundation's positioning as an administrative partner for smaller funds.

**Hank Linginfelter:** Called for the Foundation to adopt a more visible, advocacy-oriented presence in the region. Suggested CCGF act as a convener and an engine for social progress, especially in underrepresented communities like Brunswick.

**Ben Slade:** Encouraged continued leadership in literacy while supporting the Foundation's convening role. Supported the CEO Roundtable as a strong vehicle for leadership development.




**Our MISSION is to strengthen communities through engaged philanthropists. Communities of Coastal Georgia Foundation connects people who care with causes that matter in and beyond Coastal Georgia.**

**Our VISION is strengthened communities through effective philanthropy.**

- Establish a succession plan.
- Audit all fund agreements and implement an ongoing system.
- Maintain top-tier accreditations.
- Streamline three key processes.
- Achieve 100% staff and board giving.
- Ensure 100% board training participation.

**Excellence in operations & governance**

**Financial sustainability**

- Increase the foundation's total number of new funds according to specific goals.
- Attain 100% fee-driven budget.
- Establish and maintain a reserve fund.

- Achieve a 90% retention rate of fundholders from year to year.
- Launch a structured fundholder touchpoint plan.
- Host two annual events to strengthen fundholder relationships.
- Launch a Fundholder Education Program.

**Engaged, supported, and valued fundholders**

**Elevating capacity of the community**

- Educate through our philanthropic expertise by integrating a community philanthropic impact dashboard.
- Expand the Nonprofit CEO Roundtable across the coastal region.
- Increase outbound grantmaking dollar amount by 30% and maintain a rigorous, competitive award program.

Communities of
Coastal Georgia Foundation

**Our VALUES**

**Stewardship** **Leadership**
**Integrity** **Collaboration** **Meaningful Outcomes**

## CCGF Strategic Plan Strategic Priorities and Goals

### Engaged, Supported, and Valued Fundholders

- Achieve a **90% retention rate** of fundholders from year to year.
- Launch a structured touchpoint plan **by Q4 2025** to ensure all fundholders receive at least **four personalized communications** annually.
- Host at least **two events per year** to strengthen fundholder relationships and increase engagement.
- Improve fundholder expertise by launching a structured **Fundholder Education Program by Q1 2027**, aiming to have **at least 50% of fundholders participate** in at least one educational opportunity annually.

### Excellence in Operations and Governance

- Develop and implement a **comprehensive succession plan** for key leadership roles and board members by **Q1 2026**, incorporating **professional development and advancement pathways** to ensure leadership continuity and organizational stability.
- Through a comprehensive audit of **100% of fund agreements by Q4 2025,** complete any necessary updates and remedy compliance issues, and implement an ongoing fund agreement review calendar by Q1 2026 to ensure regular updates and adherence to best practices.
- Maintain the **highest levels of accreditation** through the Council on Foundations, Platinum status on Candid, and Four-Star on Charity Navigator.
- Improve operational efficiency by identifying and streamlining **at least three key administrative processes** essential to organizational excellence and implementing a system for ongoing evaluation and optimization.
- Achieve **100% participation by staff and board** making gifts directed to the Foundation **by Q4 2025,** with all contributions secured by December 31st each year and tracked through an annual reporting process.
- Ensure **100% participation** in annual board training, equipping all board members with the knowledge and skills needed for effective governance, with training completion tracked and incorporated into board evaluations.

### Elevating Capacity of the Community

- Educate our communities through our philanthropic expertise by integrating a community **philanthropic impact dashboard** to track and visualize local giving trends, fund distributions, and measurable community outcomes, with annual updates and stakeholder engagement by **Q4 2027**.
- Expand the **Nonprofit CEO Roundtable** across the **coastal region** by **Q4 2027**, increasing participation by **50%** to foster peer learning, collaboration, and leadership development.
- Increase outbound grantmaking dollar amount by **15% annually starting in Q4 2026** through CIC.
- Maintain a **rigorous, competitive award program** that enhances funding impact, transparency, and accessibility, with at least **80% of applicants** reporting a clear, fair, and supportive experience.

**Financial Sustainability**

- Increase the foundation's new funds by **an average of 12% annually over five years,** with a **total goal of $100 million by Q4 2029** through a combination of strategic fundraising and donor stewardship.
- Attain **100% fee-driven budget** where all new expenses have corresponding offsetting revenue sources for operating expenses.
- Establish and maintain a **reserve fund** equivalent to **at least three months of operating expenses** by **Q4 2027**, ensuring long-term financial stability and risk management, with annual contributions and a structured withdrawal policy.

# CCGF - Elevating the Philanthropic Journey

## Strategic Priority 1 is Engaged, Supported, and Valued Fundholders

| Goal | Action Steps | KPIs | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Owner |
|---|---|---|---|---|---|---|---|---|
| **Achieve a 90% retention rate of fundholders from year to year.** | Identify at-risk fundholders | % of dormant fundholders | | | | | | CFO** |
| | Analyze annual retention data | Fundholder retention rate | | | | | | CFO** |
| | | | | | | | | |
| **Goal** | **Action Steps** | **KPIs** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** | **Owner** |
| **Launch a structured touchpoint plan by Q4 2025 to ensure all fundholders receive at least four personalized communications annually.** | Develop timeline of touchpoints | Timeline reviewed annually | | | | | | ESC* |
| | Craft cyclical, personalized missives in diverse mediu | # of missives created | | | | | | CEO |
| | Automate when possible and send | # sent | | | | | | ESC* |
| **Goal** | **Action Steps** | **KPIs** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** | **Owner** |
| **Host at least two events per year to strengthen fundholder relationships and increase engagement.** | Plan at least two events annually | # of events | | | | | | ESC |
| | Align content with fundholder interests | # of attendees | | | | | | CEO |
| | Implement post-event evaluation | Post-event evaluation score | | | | | | ESC |
| **Goal** | **Action Steps** | **KPIs** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** | **Owner** |
| **Improve fundholder expertise by launching a structured Fundholder Education Program by Q1 2027, aiming to have at least 50% of fundholders participate in at least one educational opportunity annually.** | Create and share at least one educational video per yea | # of video views evaluated through survey | | | | | | CEO* |
| | Design program | # of opportunities developed and implemented | | | | | | CEO* |
| | Implement program | % of fundholders participating | | | | | | CEO* |

*future role of communications manager

**once filled

# CCGF - Elevating the Philanthropic Journey

## Strategic Priority 2 is Excellence in Operations and Governance

| Goal | Action Steps | KPIs | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Owner |
|---|---|---|---|---|---|---|---|---|
| **Develop and implement a comprehensive succession plan for key leadership roles and board members by Q1 2026, incorporating professional development and advancement pathways to ensure leadership continuity and organizational stability.** | Identify and define key roles on board and staff | All roles are defined and refined annually | | | | | | CEO |
| | Create and follow succession plan | Succession plan completed | | | | | | CEO |
| | Align and assign role appropriate professional development expectations for board and staff | Staff and board satisfaction scores | | | | | | CEO |
| | | | | | | | | |
| **Goal** | **Action Steps** | **KPIs** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** | **Owner** |
| **Through a comprehensive audit of 100% of fund agreements by Q4 2025, complete any necessary updates and remedy compliance issues, and implement an ongoing fund agreement review calendar by Q1 2026 to ensure regular updates and adherence to best practices** | Complete audit with Council on Foundations | # of funds audited | | | | | | CEO |
| | Issuing and receiving signed addenda for all funds | % of signed and updated funds | | | | | | CEO |
| | Maintain current best practice fund standards | Review adherence | | | | | | CEO |
| | | | | | | | | |
| **Goal** | **Action Steps** | **KPIs** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** | **Owner** |
| **Maintain the highest levels of accreditation through the Council on Foundations, Platinum status on Candid, and Four-Star on Charity Navigator.** | Board resolution to begin process | Process started | | | | | | CFO** |
| | Review changes from last accreditation | # of updates | | | | | | CFO** |
| | Submit updates biannually | Annual submission | | | | | | CFO** |
| | | | | | | | | |
| **Goal** | **Action Steps** | **KPIs** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** | **Owner** |
| **Improve operational efficiency by identifying and streamlining at least three key administrative processes essential to organizational excellence and implementing a system for ongoing evaluation and optimization.** | Identify at least 3 processes | # of processes identified | | | | | | PMEP |
| | Review SOPs and best practices | # of processes reviewed and researched | | | | | | PMEP |
| | Map and implement new workflow | # of processes improved | | | | | | PMEP |
| | | | | | | | | |
| **Goal** | **Action Steps** | **KPIs** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** | **Owner** |
| **Achieve 100% participation by staff and board making gifts directed to the Foundation by Q4 2025, with all contributions secured by December 31st each year and tracked through an annual reporting process.** | Communicate expectation to board and staff | Annual communication | | | | | | CFO** |
| | Track participation | % of participation | | | | | | CFO** |
| | | | | | | | | |
| | | | | | | | | |
| **Goal** | **Action Steps** | **KPIs** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** | **Owner** |
| **Ensure 100% participation in annual board training, equipping all board members with the knowledge and skills needed for effective governance, with training completion tracked and incorporated into board evaluations.** | Host at least 1 annual board orientation | # of attendees | | | | | | ESC* |
| | Select and offer educational opportunities through third party | # of opportunities offered | | | | | | CEO |
| | Track participation and assessment | Satisfaction scores | | | | | | ESC |
| | Establish and communicate base line responsibilities for board members by Q1 2026 | Responsibilities communicated | | | | | | |
| | | | | | | | *future role of communications manager | |
| | | | | | | | **once filled | |

# CCGF - Elevating the Philanthropic Journey

## Strategic Priority 3 is Elevating Capacity of the Community

| Goal | Action Steps | KPIs | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Owner |
|---|---|---|---|---|---|---|---|---|
| **Educate our communities through our philanthropic expertise by integrating a community philanthropic impact dashboard to track and visualize local giving trends, fund distributions, and measurable community outcomes, with annual updates and stakeholder engagement by Q4 2027** | Research and explore feasibility of Impact Dashboard | Feasibility report delivered | | | | | | PMEP |
| | Design and test prototype | Prototype created and tested | | | | | | PMEP |
| | Implement, collect feedback and baseline data | Report on data | | | | | | PMEP |
| | | | | | | | | |
| **Goal** | **Action Steps** | **KPIs** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** | **Owner** |
| **Expand the Nonprofit CEO Roundtable across the coastal region by Q4 2027, increasing participation by 50% to foster peer learning, collaboration, and leadership development.** | Identify invested partners in other counties | # of new partners | | | | | | CEO |
| | Implement quarterly meetings with annual showcase | # of meetings completed | | | | | | CEO |
| | Quality improvement through surveys | Survey scores | | | | | | CEO |
| | | | | | | | | |
| **Goal** | **Action Steps** | **KPIs** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** | **Owner** |
| **Increase outbound grantmaking dollar amount by 15% annually starting in Q4 2026 through CIC.** | External grant seeking and gaining | # of new monies coming in | | | | | | CEO |
| | Seek interfund transfers | # of money transferred | | | | | | CEO |
| | | | | | | | | |
| | | | | | | | | |
| **Goal** | **Action Steps** | **KPIs** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** | **Owner** |
| **Maintain a rigorous, competitive award program that enhances funding impact, transparency, and accessibility, with at least 80% of applicants reporting a clear, fair, and supportive experience.** | Refine CIC with continuous process improvement | Annual review of process | | | | | | PMEP |
| | Annual participant survey | Survey scores | | | | | | PMEP |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | *future role of communications manager | |
| | | | | | | | | **once filled |

# CCGF - Elevating the Philanthropic Journey

## Strategic Priority 4 is Financial Sustainability

| Goal | Action Steps | KPIs | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Owner |
|---|---|---|---|---|---|---|---|---|
| **Increase the foundation's new funds by an average of 12% annually over five years, with a total goal of $100 million by Q4 2029 through a combination of strategic fundraising and donor stewardship.** | Refining products and tools - make it easier to create | # of tools reviewed | | | | | | CEO* |
| | Focus on marketing and PR | Elevator pitch created | | | | | | CEO* |
| | Track progress | # of new funds | | | | | | CFO** |

| Goal | Action Steps | KPIs | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Owner |
|---|---|---|---|---|---|---|---|---|
| **Attain 100% fee-driven budget where all new expenses have corresponding offsetting revenue sources for operating expenses.** | Align foundation activities toward new fund developme | # of new funds | | | | | | CFO** |
| | Track budget percentage | % of budget funded by fees | | | | | | CFO** |
| | | | | | | | | |

| Goal | Action Steps | KPIs | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Owner |
|---|---|---|---|---|---|---|---|---|
| **Establish and maintain a reserve fund equivalent to at least three months of operating expenses by Q4 2027, ensuring long-term financial stability and risk management, with annual contributions and a structured withdrawal policy.** | Develop reserve policy | Reserve policy established | | | | | | CEO |
| | Allocating funds annually toward reserve fund | Reserve fund balance | | | | | | CFO** |
| | Review annually | Use of reserves | | | | | | CFO** |

*future role of communications manager

**once filled

# CCGF Strategic Plan Launch Plan & Monitoring Framework

Purpose: To effectively introduce the strategic plan, engage stakeholders, and ensure clear, consistent communication throughout implementation.

### 1. Goals and Objectives

- Awareness: Ensure all stakeholders understand the strategic priorities and their roles.
- Engagement: Foster excitement and commitment to the strategic direction.
- Consistency: Maintain unified messaging across all communication efforts.
- Sustainability: Provide ongoing updates and opportunities for involvement.

### 2. Key Audiences

Internal:

- Board members
- Staff and volunteers

External:

- Donors and funders
- Community partners
- Beneficiaries and clients
- Media and general public

### 3. Core Messaging

- Vision & Mission: Reinforcing alignment with the strategic plan.
- Key Priorities: Overview of strategic goals and anticipated impact.
- Stakeholder Role: How individuals can contribute to success.
- Call to Action: Engagement opportunities for various audiences.

### 4. Phases & Timeline

Phase 1: Pre-Launch (1 month before announcement)

- Develop communication materials (one-page, pamphlet).
- Conduct internal briefings with staff and board.
- Identify key champions to advocate for the plan.
- Teaser campaigns via internal channels (emails, social media).

Phase 2: Official Launch (Month 1)

- Distribute press releases and social media announcements.
- Publish website updates and a dedicated strategic plan webpage.
- Engage stakeholders via personalized outreach.

Phase 3: Post-Launch Engagement (Months 2-6)

- Regular updates via newsletters, social media, and community forums.
- Mention at meetings and workshops for deeper engagement.
- Collect feedback through surveys and informal discussions.
- Share early success stories and milestones.

Phase 4: Ongoing Communication (Beyond 6 months)

- Quarterly progress updates via reports and presentations.
- Recognition of contributors and achievements.
- Continuous adaptation of messaging based on stakeholder feedback.
- Quarterly review of KPIs, update as needed.

### 5. Communication Channels

Internal Channels:

- Staff meetings
- Board meetings
- Email communication

External Channels:

- Website updates and blog posts
- Social media campaigns (Facebook, LinkedIn, Instagram)
- Press releases and media engagement
- Community forums and speaking engagements
- Direct outreach (emails, calls, donor meetings)

### 6. Roles and Responsibilities

| Role | Responsibilities |
|---|---|
| Executive Leadership | Oversight, key messaging approval, stakeholder meetings |
| Board Members | Advocacy and outreach within their networks |
| Staff | Content creation, distribution, media relations day-to-day communication and stakeholder engagement |

# Monitoring Framework

### A. Monitoring Objectives

- Track progress toward strategic goals
- Identify areas for improvement
- Ensure accountability across stakeholders

### B. Data Collection Methods

- Quarterly progress reports
- Surveys and interviews
- Financial and operational dashboards

### C. Reporting Structure

- Frequency: Monthly check-ins, quarterly updates, annual reports
- Audience: Board, staff, donors, community stakeholders
- Format: Dashboard summaries, written reports, presentations

### D. Accountability & Responsibilities

- Leadership: Oversight and strategic adjustments
- Staff: Data collection and implementation
- Board: Governance and high-level review

### E. Course Correction Mechanisms

- Annual review meetings to analyze gaps and trends
- Adjust strategies based on data insights
- Continuous stakeholder engagement for feedback

## Recommendations for Implementation Success:

1. **Activate Board Engagement:**
    - Share a "Strategic Plan Playbook" with all board members outlining key goals and how they can directly support them.
    - Include strategic plan check-ins as a standing item at board meetings.
    - Empower board champions for each strategic priority to lead peer accountability.
2. **Support Staff with Capacity and Clarity:**
    - Align staffing structure and professional development with the scope of goals.
    - Continue evaluating team capacity in line with asset and fundholder growth targets.
3. **Monitor Progress with Transparency:**
    - Use a shared KPI dashboard to update staff, board, and stakeholders on a quarterly basis.
    - Establish annual strategic review sessions to assess progress, identify challenges, and adjust approaches as needed.
4. **Communicate Broadly and Often:**
    - Develop a communication plan to celebrate wins, highlight impact, and keep stakeholders informed and inspired.
    - Reinforce the Foundation’s identity as a connector, convener, and catalyst in Coastal Georgia.

It has been an honor to guide this process. The CCGF team is exceptionally well-positioned for this next phase. I believe your strategy is sound, your priorities are focused, and your leadership is clearly committed. I encourage you to see this plan not as a finish line, but a launchpad. With continued collaboration, clear communication, and shared ownership, the next five years hold extraordinary potential.

Thank you for the opportunity to walk alongside you in this meaningful work. It aligns with CCGF's legacy of trust and innovation while setting a high bar for community impact.