



Strategic Plan Summary

PILLAR I - Accounting and Finance

Organizationally, we are tasked with a number of financial reporting and regulatory requirements. In addition, our fiduciary responsibilities to our donors and to the agencies we serve compel us to regularly evaluate and strengthen our internal controls. Both of these components require significant investments in training and staff time to ensure compliance. In the Accounting and Finance Pillar, you will find objectives around becoming more technologically innovative, continued strengthening of internal controls to combat threats from both external and internal sources, and monitoring the ongoing convergence with international financial reporting standards.

On a more operational basis, we will be overhauling the Foundation's annual budget process, implementing remote deposit at banks capable of supporting this technology, and increasing staff's role in non-audit tasks. We will also be striving to maintain and even enhance our top decile investment return performance in the Council of Foundation's survey benchmarks.

PILLAR II - Asset Development

Successful asset development allows Community Foundations to increase grant making and provide other support to meet the needs of the community. There is a direct correlation between total assets and the amount of grant making a Foundation can support. At the Community Foundation of the Eastern Shore, we have established a vision of increasing grant making to \$10 million annually by 2024.

In order for this goal to be achieved, the Asset Development Committee has been reorganized with new leadership. There will be enhanced board participation in asset development including speaking engagements to civic groups and others. We will also be engaging our existing donors and increasing outreach to specific audiences. Lastly, we want to think outside the box by investigating opportunities to develop assets in creative ways not previously employed by the Community Foundation of the Eastern Shore.

PILLAR III - Donor Services

Great donor service is the hallmark of a successful Community Foundation. At the Community Foundation of the Eastern Shore, we dedicate ourselves to providing the highest level of donor services. In our Strategic Plan, we have carefully crafted a number of objectives to enhance donor services. We plan on increasing the number of personal contacts with our donors, while at the same time providing more education and networking opportunities. We will also be developing a Customer Relationship Management Process. Marketing will play a key role in Donor Services so we are currently revising our materials and creating new marketing pieces.

In our Strategic Plan, scholarship administration is a part of our Donor Services Pillar and as such, a set of objectives and tactics are dedicated exclusively to it. For example, we will be creating a scholarship calendar of all the dates and deadlines associated with scholarship activities, reviewing and updating all scholarship funds administered by the Foundation, ensuring all the scholarship representatives and selection committee information is accurate, and documenting all scholarship information we send to schools, fund representatives and selection committees.

PILLAR IV - Governance and Administration

Having an engaged and supportive Board of Directors, as well as a well-trained and highly energized group of professional staff is tantamount to an effective, well-oiled organization capable of accomplishing great things. To this end, the Community Foundation of the Eastern Shore has committed itself to demonstrating and communicating superior performance and transparency in all dimensions of governance and operational administration.

Operationally, a process for reviewing and updating important Foundation documents, including By-Laws and policies and procedures has been established. Standard operating procedures are being developed for common tasks and staff will be receiving LEAN and Six Sigma training to reduce/eliminate waste and ensure our processes are structured to enhance efficiency. Additionally, we will be expanding the number and quality of educational training programs for both staff and Board members.

Our Board nomination process is focused on securing membership from geographic, cultural, racial and age diverse groups within the service area of the Foundation. The Board will be reinstituting a self-evaluation process in concert with the President's and staff's evaluation process. Advocacy is also another important component of our Strategic Plan. Staff will be participating in hearings with government officials and industry experts to keep abreast of important legislative and regulatory issues.

The Foundation also engages with other area not-for-profits to collaborate and provide programs and services benefitting the community. Staff will seek out leadership positions in industry organizations in an effort to heighten awareness for the Community Foundation of the Eastern Shore and to influence both State and Federal Legislation.

PILLAR V - Marketing and Community Relations

Expanding public awareness and understanding, as well as increasing philanthropy are focuses for the Foundation. The objectives outlined in the Strategic Plan provide a great blueprint for multiple efforts to heighten public awareness and improve support for the other Pillars including Asset Develop, Donor Services, and Non-Profit Services.

Going forward, the Foundation will be redesigning the existing website to improve navigation, and make our website more streamlined and connected to social media. New Marketing materials will be created to support numerous donor and asset development activities, as well as new programmatic and service needs.

PILLAR VI - Non Profit Services

A major component of the Community Foundation of the Eastern Shore is the Nonprofit Program, which includes the ShoreCAN Volunteer Center. The Nonprofit Resource Center provides the local sector with electronic and print materials on a wider range of nonprofit management and philanthropic topics. A key research tool is the Foundation Center's Foundation Directory Online; a searchable database of potential funding opportunities of over 150,000 nationwide grant makers.

The ShoreCAN Volunteer Center promotes volunteerism by connecting individuals and groups who have the time and talent to seek opportunities for service with local nonprofit organizations. Our Volunteer ShoreCAN data base contains hundreds of volunteers and volunteer opportunities.

The new Strategic Plan has identified several opportunities to enhance the use of the Nonprofit Support Center and the ShoreCAN Volunteer Center. Strategies and tactics revolve around increasing attendance for programs, increasing the Foundation's nonprofit partnership, seeking out new collaborations and advertising the value of the Nonprofit Resource Center.

The Foundation is committed to enhancing the capacity of local organizations through our local grant making. The Nonprofit Support Program offers a number of grant opportunities throughout the year. We are very proud of the diversity in our grant making programs. Currently, our staff, Board, and volunteers are evaluating current grant making processes, procedures, and forms for clarity and improvement opportunities.