OVERVIEW OF THIS DOCUMENT

This Strategic Plan outlines the strategy that will guide CDP’s work for the upcoming three-plus years and includes the following:

- An updated Vision and Mission, new values statements, and underlying Theory of Change
- The organization’s overarching strategic goals and initiatives to achieve these strategic goals
- The estimated resources needed to effectively carry out this plan
- Approach detail for carrying out initiatives (in an Appendix)

All documents are the result of a strategic planning process that was overseen by CDP’s Strategic Planning Working Group consisting of a subset of CDP’s Board and staff members.

This project took place from May 2019 through November 2019. Boost Social Sector Consulting guided the process, facilitated deliberations with the Board and staff, and undertook research and analysis, including:

- Review of internal documents
- Interviews with Board and staff
- Topical discussions with sub-groups of staff (Theory of Change, DEI, programs)
- External stakeholder interviews across a range of types
- Analogous organization and business model research
CONTENTS

Summary of insights from research and deliberations

The Center for Disaster Philanthropy’s strategy going forward

Resource requirements for executing the strategy

Appendix: Recommended approach to implementing initiatives
WHAT WE SOUGHT TO LEARN IN RESEARCH AND DELIBERATIONS

Inquiry Questions

Overall Context
• What are the key challenges in disaster philanthropy overall?
• What are the key opportunities for CDP in the disaster philanthropy landscape?

CDP Today
• What are CDP’s main strengths and weaknesses?
• What can CDP improve about its current areas of work?
• For those who have not engaged with CDP: Is disaster philanthropy a priority for your organization? How so? (or Why not?)

CDP Going Forward
• What are some different ways CDP can better serve its audiences in order to achieve its mission?
• How should CDP measure the impact of its work?
• How should CDP anticipate its revenues and business model evolving over time?
• What does CDP’s underlying theory of change suggest about our potential work priorities in the future?
• For those who have not engaged with CDP: What if anything could CDP offer in terms of mission or programming that would be of interest to you?

“Right stamps” on the subsequent pages in this section correspond to these topics
DISASTERS ARE ON THE RISE AND RECOVERY FUNDING IS UNCERTAIN

There has been a significant rise in natural disasters globally over the past few decades

<table>
<thead>
<tr>
<th>Decade</th>
<th>Average number of disasters</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980s</td>
<td>400</td>
</tr>
<tr>
<td>1990s</td>
<td>630</td>
</tr>
<tr>
<td>2000s</td>
<td>730</td>
</tr>
</tbody>
</table>

Giving can vary substantially from disaster to disaster, especially when occurring close together

<table>
<thead>
<tr>
<th>Disaster</th>
<th>Donation (in millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hurricane Harvey</td>
<td>$350</td>
</tr>
<tr>
<td>Hurricane Irma</td>
<td>$45</td>
</tr>
<tr>
<td>Hurricane Maria</td>
<td>$9</td>
</tr>
</tbody>
</table>

Source: Worldwatch Institute

Donations dropped off considerably in 2017 with the passing of each subsequent Hurricane

A disproportionate share of funding goes to relief over recovery

- “There’s so much more [need] after relief, we knew the amount of money we were giving could be more impactful later than in relief”
- “[There’s a] case for not rushing into immediate needs, there is a lot of funding in that space already”
- According to SODP, philanthropic donations for relief was 3x higher than for recovery

Source: Stakeholder interviews, June – July 2019; Boost synthesis
SEVERAL KEY TRENDS IN PHILANTHROPY ARE AFFECTING CDP’s OPPORTUNITIES FOR GROWTH AND IMPACT

**Giving is rising**

Overall, giving is on the rise across all categories of philanthropy and donations;

According to the GivingUSA 2018 Annual Report, giving has risen in all categories over the past five years:
- Foundation giving increased by 44%
- Corporation giving increased by 21%
- Individual giving increased by 17%

**DAFs are gaining popularity**

There is a greater use of Donor-Advised Funds, which fragments decision-making around giving, but also creates opportunities for redirecting funds to disaster recovery
- According to National Philanthropic Trust, Donor-Advised Funds were 10% of total individual giving in 2017 compared to 6% of in 2012

**There appears to be a rise in “instant giving”**

Giving at point-of-sale, through crowdfunding, texting, etc. – both in small and large amounts – fueled by technology has increased
- In the context of a disaster, the emotional desire to respond quickly has led to large amounts of funding within weeks of an event (e.g., crowdfunding sites like GlobalGiving have raised $67 million to date for disasters)
DISASTER PHILANTHROPY IS NOT A FIELD (YET?)

With only a handful of funders prioritizing disaster recovery, the notion of “disaster philanthropy” as a well-formed field is nascent.

At the same time, there appears to be a lot of “jockeying for position” among organizations that look to appeal to funders and donors around disasters.

There is a sense that, in general, people are unclear on relief vs. recovery.

- More broadly, even though various data shows that spending upfront on readiness can save on the costs of disaster relief and recovery, the understanding and appetite for “resilience” appears limited.
- The majority of dollars are raised within days / weeks of a disaster, and well-known “relief” organizations acquire most of the funding.

(1) For example, National Institute of Building Sciences cites that “every $1 invested in disaster mitigation saves society $6” on their website.
# CDP Strategic Plan 2019

## CDP Today

**CDP is seen quite favorably by those who have engaged with its services...**

<table>
<thead>
<tr>
<th>There is recognition of CDP’s role in bringing about greater focus around recovery</th>
<th>And, by and large, CDP’s stakeholders want to see it continue to do what it already does, sharpening focus</th>
</tr>
</thead>
</table>
| **CDP is seen as unique**  
  - Overall, stakeholders struggled to come up with other players in disaster philanthropy that provide consulting and regranting | Knowledge and expertise are seen as core assets |
| **CDP is recognized for its focus on long-term recovery**  
  - Stakeholders echo CDP and stress the importance of long-term funding in order to truly recover from a disaster | There is overall resonance with the three areas of focus, and few interviewees could identify other areas that they would like to see CDP add to its portfolio of programmatic work |
| **CDP’s reputation as a credible, high quality organization is growing**  
  - Stakeholders see CDP as a nationally trusted entity and encourage them to leverage that reputation to take their organization to the next level | Capacity – and perhaps lack of clarity – are seen as the key weaknesses |
… WHILE THOSE WHO HAVE NOT ENGAGED WITH CDP
DO NOT SEE THEMSELVES AS DISASTER FUNDERS
(Even Though Numbers In The SODP Would Say Otherwise)

**Interviewed stakeholders do not see themselves as disaster funders or see disaster giving as a one-off activity or low priority.**

**The majority of foundations studied in this planning process were ranked among the top 15 foundations giving to disasters,\(^1\) yet they claimed that they were not disaster funders.**

**Furthermore, these stakeholders seem to be aware of the difference between relief and recovery, and are resolute on deciding to give to one or the other.**

---

\(^1\) According to the State of Disaster Philanthropy
Source: Interviews with foundations that have not engaged CDP’s services, August 2019; Boost synthesis
WITHIN CDP’s THREE CURRENT PROGRAM AREAS, OVERALL THERE IS STRONG FAVOR
With a Handful of Suggestions for Enhancement

<table>
<thead>
<tr>
<th>Area of work</th>
<th>Current situation</th>
<th>Opportunities Going Forward</th>
</tr>
</thead>
</table>
| Educate and Inform | • Seen as critical and unique  
• CDP’s most important role is seen by some as that of an educator | • Concerns about quality / usability of some materials (e.g., Disaster Playbook seen as overwhelming)  
• Lack of clarity on website |
| Grantmaking     | • Valued alternative for an organization that doesn’t have staff capacity focused on disaster giving  
• Allows for funds to be pooled for lower profile disasters (including national disasters)  
• More broadly, pooling allows for more efficient giving  
• May be seen as sometimes being a conflict of interest with CDP’s consulting work | • 5% fee is valued, but may be too much of a bargain  
• Seen as competing / redundant by some grantees, but also some funders  
• International funding seen as possibly less value-add (e.g., if grantees are large, known non-profits; if CDP doesn’t have people present in the markets, etc.)  
• Consider setting targets for each fund  
• Potential to improve donor stewardship |
| Consulting      | • Clients are overall very pleased with the level of attentiveness and communication, and look forward to continuing the relationship  
• Proactive nature of PPREP seen in favor  
• Seen as high quality and unique | • Capacity concerns / high dependence on a handful of people  
• Pricing / margin opportunity cited, mainly by operation funders  
• Pipeline development, especially since these are not always ongoing relationships |
AND, LOOKING AHEAD, A HANDBULF OF NEW PROGRAM AREAS WERE SUGGESTED
Views Vary on Whether and to What Extent CDP Should Pursue Them

Idea: Undertake policy work with the Federal Government
- Seen as critical in that there are large sums of government money going to disasters and that perhaps they aren’t always used in the most efficient way
- At the same time, seen as very difficult to affect change due to politics, large system to navigate, etc.

Idea: Launch an annual convening / conference on disaster philanthropy
- Generally favored by almost all stakeholders who believe CDP can play a strong role in this effort
- Some raised key considerations that should be vetted before moving forward, especially around target audiences and ability of invitees to attend

Other ideas:
- Stakeholders are unclear on whether CDP should do more with individuals; echo staff views that there is “a lot of money out there.” At the same time, might be off-mission to focus on individuals
- Disaster visits for donors are seen very favorably, especially to help show impact, and could also help realize earned income
- Membership is seen as another way to bring in revenue for the time and effort it takes staff to produce CDP’s resources; at the same time, could limit access especially in times of need for those seeking to respond to a disaster more systematically for the first time. (Note: If pursuing membership, consider exploring a tier-based approach)
INTERVIEWEES SEE PERFORMANCE MEASUREMENT AROUND DISASTERS AND DISASTER PHILANTHROPY AS IMPORTANT
But No Defining Frameworks Were Identified

All interviewees see it as valuable to advance the use of performance metrics for disaster philanthropy – and disaster recovery – and appreciated that CDP is exploring this area further.

At the same time, there appears to have been little work done in this area beyond “outputs” that describe dollars spent, grants undertaken, etc., or organizational specific results (e.g., houses built):

- Metrics don’t appear to speak to outcomes or outcome indicators
- Some pointed to academic institutions as taking a lead in this area, but did not cite any specific results to date

Review of the practices of analogous organizations (from published content on their websites) suggests that this struggle is common:

- Like stakeholders, analogs also cite output-type indicators in areas such as financial, partnerships, and “on the ground” activity
THERE ARE A HANDBULF OF INSIGHTS FOR CDP’s BUSINESS MODEL GOING FORWARD
Based on an Initial Review of the Business Models of Analogous Organizations

- Organizations that regrant do so at very large volumes, perhaps suggesting the need to do so in order to cover direct costs and get scale benefits for overhead.

- Those that rely on earned income have multiple sources for realizing contribution from activities, often including advisory services / consulting.

  However, analogous organizations reviewed during this planning process seem to cap out under $3 Million in revenue from advisory services / consulting.

- Smaller organizations that appear to have a “niche” role in serving philanthropy do not pursue individual fundraising.

- Affinity groups tend to realize a significant portion of their revenues from membership and/or subscriptions.

- Those that earn income from conferences / education generate below $1 Million in revenue from those activities.
FROM A BUSINESS MODEL PERSPECTIVE, ONE VIEW OF CDP IS AS A “NATIONAL COMMUNITY FOUNDATION FOR DISASTERS”

A 2015 Study Illustrates Four Types of Potential CF Revenue Models

The four models described in the study are:

- Established Institutions: Older, with a high percent of assets in endowed and discretionary / field of interest funds
- Donor-Focused: Lean business model with revenues almost entirely in donor-driven products
- Change Catalyst: Focuses largest share of capacity on initiatives and leadership
- Statewide / Rural Regional: Develops charitable resources and addresses multiple communities’ needs

Staff and board members that reviewed this report suggested that CDP is best described by the “change catalyst” model

- This model seeks to create buy-in by proactively asking donors to learn about and fund initiatives
- This model also reflects the “affinity group” approach that is growing, with which CDP can relate

This “change catalyst” model calls for a community foundation to grow sustainable funding sources for its leadership and its initiatives, and cautions against becoming over-extended or straying too far from the organization’s roots

Notably, about 40% of the revenues for the “change catalyst” foundations include external gifts and/or operating grants, suggesting long-term dependency on philanthropy

Source: CF Insights Community Foundation Business Models

CDP Going Forward
RESEARCH AND DELIBERATIONS SUGGEST THAT CDP SHOULD CONTINUE TO POSITION ITSELF AS AN INFLUENCER…
Leading with Its Engagement of Philanthropy

As articulated in the Theory of Change developed during this planning process (see next section), CDP is seeking two overall, complementary outcomes from its work:

• That vulnerable populations realize equitable outcomes, especially in housing, mental health, and employment, and
• Holistic recovery following a disaster, i.e., efficient restoration of infrastructure and livelihood of all members of an affected community

Based on discussions with Board and staff, for CDP to achieve these two goals, it needs to continue to be primarily positioned as an influencer…

• There is tremendous opportunity to influence philanthropy, as there are many, many donors that give but only a handful appear to be reached by CDP
• Re-granting alone would likely require becoming a massive organization, and may continue to face criticism for added overhead expenses
• Positioning as a field maker appears pre-mature at this time, as there are relatively few organizations that self-identify as disaster funders
• There is significant competition in reaching mass audiences around disasters

… And broadening its scope to affect public funding for the life cycle of disasters
...AND PURSUE THE FOLLOWING EMERGING STRATEGIC PRIORITIES

- Reach all (staffed) foundations and major donors (that use organized giving channels) to ensure they are clear on what constitutes as disaster giving and how to give strategically in preparation for and in response to disasters

- Seek to replicate consortium funding models (e.g., PPREP, ERF, LDRA) across the USA to emphasize and fund preparation

- Expand learning and knowledge sharing activities to fuel rising interest in disaster philanthropy

- Maintain local presence in select geographies to ensure CDP is grounded in the challenges and opportunities of undertaking disaster preparation and recovery work

- Be poised and ready to opportunistically pursue “mass” fundraising in the wake of high-profile disasters to help ensure effective on-the-ground grantmaking

- Initiate efforts that can influence public spending and activities on disasters

- Underscore the concepts and notions of DEI to play a more central role in CDP’s identity, strategy and organizational development going forward
## CONTENTS

Summary of insights from research and deliberations

The Center for Disaster Philanthropy’s strategy going forward

Resource requirements for executing the strategy

Appendix: Recommended approach to implementing initiatives
FRAMEWORK USED TO DEVELOP THIS STRATEGIC PLAN

- Origin and achievements
- Current capacity and capabilities
- Key insights generated through research and deliberation

Underlying Theory of Change, updated vision and mission statements, and organizational values

Strategic Goals

Initiatives to achieve goals
CDP’s THEORY OF CHANGE ILLUSTRATES THE PATH TO IMPACT

<table>
<thead>
<tr>
<th>Problem Statements</th>
<th>What CDP Does</th>
<th>Outcomes CDP Seeks</th>
<th>Impact CDP Seeks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disasters are rising and there is a lack of money in general given to disasters</td>
<td>CDP educates funders and major donors on the needs across the full life cycle of disasters, as well as on equitable giving, and intersectionality</td>
<td>Funders make better choices in how and how much they give to disasters, providing abundant funding for resilience, preparation, and recovery</td>
<td>Local nonprofits are well-resourced to serve their community in preparation for and response to disasters</td>
</tr>
<tr>
<td>The money that is given to disasters is disproportionately given to relief; not enough resources go to recovery</td>
<td>CDP offers efficient grantmaking options for giving to disaster preparation, relief and recovery</td>
<td>Communities are built and resourced to be “Disaster Resilient”</td>
<td></td>
</tr>
<tr>
<td>Recovery efforts often fail to use an equity lens and place too little emphasis on vulnerable populations</td>
<td>Through its knowledge and connections, CDP seeks to ensure that funds are applied locally and thoughtfully towards driving equitable outcomes from recovery work</td>
<td>Vulnerable populations realize equitable outcomes, especially in housing, mental health, and employment</td>
<td></td>
</tr>
<tr>
<td>There is an insufficient amount of coordination amongst funders, and not enough partnerships to effectively address the widening gap of unmet needs</td>
<td>CDP aspires to influence the dollars and activities of key government agencies</td>
<td>Holistic recovery: Following a disaster, there is efficient restoration of infrastructure and livelihood of all members of an affected community</td>
<td></td>
</tr>
<tr>
<td>CDP amplifies the importance and impact of its work to influence all public and private disaster giving</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

CDP’s values: 
- Collective Responsibility: We recognize that it takes collaboration to achieve the outcomes we seek
- Equity Mindset: We apply a holistic lens to the disaster life cycle to help those most vulnerable
- Expertise: We share our experiences and insights to foster better preparation and response
- Inclusion: We believe better decisions result from honoring local, diverse voices
- Resource Stewardship: We ensure funds and other resources are effectively and efficiently utilized

The underpinnings of our approach

CDP Strategic Plan 2019-11-13 vF
THE PROPOSED VISION AND MISSION STATEMENTS SEEK TO SHARPEN CDP’s FOCUS, EMPHASIZE RESOURCE SUFFICIENCY

Current Vision:
A world where donors strategically plan for and respond to disasters in order to minimize their impact on vulnerable populations and communities

Proposed Vision:
A world where informed funding choices enable communities to recover effectively and equitably from disasters

Current Mission:
Transform the field of disaster philanthropy to increase donor effectiveness throughout the life cycle of disasters through our educational resources, fund opportunities and strategic guidance

Proposed Mission:
Motivate and leverage the power of philanthropy to ensure ample amounts of public and private resources go to disaster resilience, preparedness, and recovery
AND, A SET OF DELINEATED VALUES STATEMENTS SHAPE CDP’s CULTURE AND INFORM ITS DECISION-MAKING

<table>
<thead>
<tr>
<th><strong>Collective Responsibility</strong></th>
<th>We know that it takes more than a single individual, institution, or community to bring about the change we seek, working together</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Equity Mindset</strong></td>
<td>We apply a holistic lens to all aspects of service and support throughout the disaster life cycle, seeking to ensure vulnerable populations realize greater equity from the application of resources</td>
</tr>
<tr>
<td><strong>Expertise and Knowledge Sharing</strong></td>
<td>We are at the forefront of effective disaster philanthropy – fueled by our presence and engagement with local practitioners – and, by sharing our insights, we foster better preparation and response</td>
</tr>
<tr>
<td><strong>Inclusion</strong></td>
<td>We believe that better decisions are made when local, diverse voices are honored in determining actions</td>
</tr>
<tr>
<td><strong>Resource Stewardship</strong></td>
<td>We appreciate the importance of every available resource to help mitigate the ills of disasters, and the desire for those providing the resources to know that their support is efficiently used and effectively making an impact</td>
</tr>
</tbody>
</table>
FOUR STRATEGIC GOALS TO ACHIEVE MISSION AND VISION
For The Coming Years

A. Every institutional funder and major donor knows that they can be more strategic in giving to disasters (BUILD AWARENESS)

B. Funders and donors who choose to be strategic in funding disasters benefit from CDP’s expertise (IMPART KNOWLEDGE)

C. Funders and donors can efficiently access resilience, preparation, and recovery providers through CDP (FACILITATE ACCESS)

D. Public funding streams encompass more funding for disaster resilience, preparation, and recovery (ENHANCE POLICYMAKING)
INITIATIVES FOR EACH OF THE FOUR STRATEGIC GOALS (1 of 3)

A. BUILD AWARENESS

1. Track disaster funding activity and where CDP stands relative to the top 500 staffed foundations and the top 200 corporate foundations to inform target marketing strategy
   - Use this insight to prioritize locations/organizations for speaking engagements, press access, etc.

2. Continue to pursue regular speaking engagements with various philanthropy intermediaries (e.g., regional associations and affinity groups), leveraging insights from the State of Disaster Philanthropy and CDP’s field experience

3. Engage on social media and participate in interviews with broadcast and print journalism before, during, and after major disasters in order to reach a broader donor audience
INITIATIVES FOR EACH OF THE FOUR STRATEGIC GOALS (2 of 3)

1. Grow the consulting practice to reach more of the philanthropy market, prioritizing lead development and adding flexible capacity to undertake assignments (through contractors, consulting partners, etc.); maintain strong margins

2. Define a learning agenda that can yield research products (e.g., case studies) that showcase the benefits of resilience and preparation, and highlight effective recovery practices – particularly those that lead to equitable outcomes

3. Bolster online resources to ensure ease-of-use and to facilitate deeper engagement with CDP’s work

4. Continue to use webinars, eNewsletters, and social media to disseminate insights, sustain interest, and promote CDP’s other offerings

5. Host a funders convening to share learning and build community, with an eye towards establishing a “field” of disaster philanthropy
INITIATIVES FOR EACH OF THE FOUR STRATEGIC GOALS (3 of 3)

C. FACILITATE ACCESS

1. Pursue roll-out of collaborative funding models for resilience and early recovery in 3 to 5 states and/or regions, marketing the success of PPREP, ERF and LDRA

2. Sustain field presence and regranting activity through event-specific recovery pooling from institutional funders and major donors

3. Selectively pursue mass market fundraising opportunities (e.g., point-of-sale partnerships with retailers, social media click-throughs), both immediately following a high-profile disaster and for support to areas that still require recovery funding well after the disaster occurred

D. ENHANCE POLICYMAKING

1. Develop an initial policy agenda for affecting how government dollars and other resources are deployed in the wake of disasters

2. Establish working relationships with key federal government stakeholders to message CDP’s learning and call to action

3. Target one or two states for state-based work and learning, and explore opportunities for policy enhancements and public/private partnerships
ADDITIONAL INTERNAL INITIATIVES TO STRENGTHEN CDP AS AN ORGANIZATION

1. Develop a common language, definition, and understanding of diversity, equity, and inclusion as individual terms to facilitate discussion of DEI issues

2. Train current and new staff and Board on unconscious bias to highlight the interpersonal aspects of DEI work

3. Hold DEI reflection sessions two to four times per year; reflect on progress from the previous reflection session and discuss what actions to take before the next reflection session

4. Ensure programmatic work nurtures diversity, equity, and inclusion (e.g., holistic view in consulting work, RFP process in grantmaking)

5. Clarify roles and responsibilities within the organization, particularly due to relatively rapid growth in recent years

6. Strengthen donor stewardship and relationship management practices in reporting and communications

7. Foster staff connectedness by gathering in-person on a semi-annual basis
   • Agenda should include time to build team cohesiveness
   • Link to DEI activities when possible
PROPOSED PERFORMANCE MEASUREMENT APPROACH (1 of 2)

Impact measures

<table>
<thead>
<tr>
<th>Communities</th>
<th>Target performance level</th>
<th>Data sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>❑ Increase in resilience for communities CDP has worked with</td>
<td></td>
<td>• Data from Candid(^{(1)})</td>
</tr>
<tr>
<td>❑ Number of people provided housing, mental health, and/or employment assistance</td>
<td></td>
<td>• Annual survey of CDP partners</td>
</tr>
<tr>
<td>❑ Improvement in recovery time and outcomes for vulnerable populations (relative to prior, comparable disasters)</td>
<td></td>
<td>• Field research</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Anecdotes from staff</td>
</tr>
</tbody>
</table>

Philanthropy

| ❑ Increase in overall giving to disasters                                   |                          | • Data from Candid                                                          |
| ❑ Increase in number of top foundations giving to disasters                 |                          | • Annual survey of CDP partners                                              |
| ❑ Change in amount/portion of funding given to disaster resilience, preparedness, and recovery by organizations we work with closely (relative to relief-giving) |                          | • Impact summary of consulting projects                                      |
| ❑ Increase in number of foundations that have a disaster giving strategy    |                          |                                                                              |
| ❑ Number of public/private partnerships created                             |                          |                                                                              |

\(^{(1)}\) Formerly Foundation Center and GuideStar which announced their merger in 2019
## PROPOSED PERFORMANCE MEASUREMENT APPROACH (2 of 2)

### Reach, Activity, and Capacity

<table>
<thead>
<tr>
<th>Outreach/Network</th>
<th>Target performance level</th>
<th>Data sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>❑ Percent of targeted institutional and corporate foundation market reached</td>
<td>100% (within 5 years)</td>
<td>• Tracking tool</td>
</tr>
<tr>
<td>❑ Number of press inclusions and mentions</td>
<td>TBD*</td>
<td>• Broadcast or publication channel report</td>
</tr>
<tr>
<td>❑ Viewership numbers (broadcast)</td>
<td>TBD*</td>
<td>• Registration metrics</td>
</tr>
<tr>
<td>❑ Webinar participation levels</td>
<td>TBD*</td>
<td>• Insights tab (Facebook), Twitter Analytics</td>
</tr>
<tr>
<td>❑ Click-through rate</td>
<td>5%</td>
<td>• Website analytics</td>
</tr>
<tr>
<td>❑ Social media referral traffic to website rate</td>
<td>30%</td>
<td>• Redbooth dashboards, reports, etc.</td>
</tr>
<tr>
<td>❑ Number of participants in CDP convenings</td>
<td>25 to 35 annually</td>
<td>• Financials</td>
</tr>
<tr>
<td>❑ Number of government speaking events</td>
<td>TBD*</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Consulting</th>
<th>Target performance level</th>
<th>Data sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>❑ Number of new consulting clients</td>
<td>TBD*</td>
<td>• Redbooth dashboards, reports, etc.</td>
</tr>
<tr>
<td>❑ Average margin per consulting client</td>
<td>30%</td>
<td>• Financials</td>
</tr>
<tr>
<td>❑ Total consulting revenue</td>
<td>See budget</td>
<td>• Annual survey</td>
</tr>
<tr>
<td>❑ Staff/contractor billability</td>
<td>80%+</td>
<td></td>
</tr>
<tr>
<td>❑ Number of referrals that led to a consulting engagement</td>
<td>33%+</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Regranting</th>
<th>Target performance level</th>
<th>Data sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>❑ Number of states/regions in which CDP has maintained strong local connections</td>
<td>TBD*</td>
<td>• Field reporting</td>
</tr>
<tr>
<td>❑ Number of new collaborative funding models</td>
<td>3 to 5 states/regions</td>
<td>• Financials</td>
</tr>
<tr>
<td>❑ Funds regranted by CDP</td>
<td>TBD</td>
<td>• Annual survey</td>
</tr>
<tr>
<td>❑ Donor retention</td>
<td>90% annually</td>
<td></td>
</tr>
<tr>
<td>❑ Donor satisfaction</td>
<td>80%+</td>
<td></td>
</tr>
</tbody>
</table>

* - Staff to determine baseline
CONTENTS

Summary of insights from research and deliberations

The Center for Disaster Philanthropy’s strategy going forward

Resource requirements for executing the strategy

Appendix: Recommended approach to implementing initiatives
SUMMARY OF ORGANIZATIONAL REQUIREMENTS

Overall the organizational model would largely remain intact

- CDP would maintain its distributed staffing model
- Programming would stay centralized under the Vice President
- CDP would continue with current hiring plans that address organic growth of its work (e.g., a Development Associate has been included in the proposed 2020 budget)

Two key new positions would be added to help advance CDP’s strategy

- Director of Research (and Learning) – reporting into the Vice President (for programs)
- Director of Public Policy – reporting into the President/CEO
- Additional human resources would be acquired on an as needed basis, for example:
  – Time-limited interns (non-permanent hires)
  – Additional consulting staff (on a contracted basis)

As shown earlier, a number of internal initiatives would be executed to strengthen culture and select operational practices

For implementing the plan, initiatives supporting the strategic goals have been assigned to a staff person to own and lead (see next page)
## STAFFING ASSIGNMENTS AND TIMING FOR STRATEGIC PLAN INITIATIVES (1 of 2)

<table>
<thead>
<tr>
<th>Initiative Summary</th>
<th>Lead Staff</th>
<th>Supporting/Other Staff</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A.1: Top foundations marketing</strong></td>
<td>Laura Starr</td>
<td>Melanie Davis-Jones*</td>
<td>Jan 2020 – Dec 2022</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Regine Webster**</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Research Intern</td>
<td></td>
</tr>
<tr>
<td><strong>A.2: Speaking engagements</strong></td>
<td>Melanie Davis-Jones</td>
<td>New President/CEO</td>
<td>Ongoing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Board members</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Kim Maphis Early</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sally Ray</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Regine Webster</td>
<td></td>
</tr>
<tr>
<td><strong>A.3: Social media and journalism engagement</strong></td>
<td>Melanie Davis-Jones</td>
<td>New President/CEO</td>
<td>Ongoing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Board members</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Kim Maphis Early</td>
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<tr>
<td></td>
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<td>Sally Ray</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Regine Webster</td>
<td></td>
</tr>
<tr>
<td><strong>B.1: Growing consulting practice</strong></td>
<td>Regine Webster</td>
<td>Britney Brown</td>
<td>Ongoing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Melanie Davis-Jones</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Marketing events)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Kim Maphis Early</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sally Ray</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Additional consultants as needed</td>
<td></td>
</tr>
<tr>
<td><strong>B.2: Learning agenda</strong></td>
<td>Regine Webster</td>
<td>Brennan Banks</td>
<td>Learning agenda / secure funding: Jan – Jun 2020</td>
</tr>
<tr>
<td></td>
<td>(Learning Agenda)</td>
<td>Nancy Beers</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Director of Research</td>
<td>Undertake research: Jul 2020 – Ongoing</td>
</tr>
<tr>
<td></td>
<td>(Execution)</td>
<td>Melanie Davis-Jones***</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sally Ray</td>
<td></td>
</tr>
<tr>
<td><strong>B.3: Bolster online resources</strong></td>
<td>Tanya Gulliver-Garcia</td>
<td>Melanie Davis-Jones</td>
<td>Jan – Dec 2020</td>
</tr>
<tr>
<td><strong>B.4: Webinars, eNewsletters, and social media</strong></td>
<td>Ruja Entcheva</td>
<td>Melanie Davis-Jones</td>
<td>Ongoing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Content provided by various programmatic staff</td>
<td></td>
</tr>
</tbody>
</table>

* Messaging and collateral development  
** Oversight  
*** Dissemination
<table>
<thead>
<tr>
<th>Initiative Summary</th>
<th>Lead Staff</th>
<th>Supporting/Other Staff</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>B.5: Hosting funders convening</td>
<td>Laura Starr</td>
<td>New President/CEO, Melanie Davis-Jones, Regine Webster, Director of Research, Others as needed</td>
<td>2021 – Ongoing (annual)</td>
</tr>
<tr>
<td>C.1: Collaborative funding models</td>
<td>Regine Webster</td>
<td>Nancy Beers, Kim Maphis Early, Laura Starr*, Director of Research**, Additional staff</td>
<td>Research and funding: Jan – Jun 2020 (or when realized), Implementation: Jan 2021 – contract completed</td>
</tr>
<tr>
<td>C.2: Regranting activity</td>
<td>Regine Webster</td>
<td>Brennan Banks, Nancy Beers, Sally Ray, Laura Starr*, Director of Research**, Additional staff</td>
<td>Ongoing</td>
</tr>
<tr>
<td>C.3: Mass market fundraising</td>
<td>New President/CEO</td>
<td>Laura Starr, Melanie Davis-Jones***</td>
<td>Set up relationships: Jan 2020 – Jul 2021, Maintain/leverage: Ongoing</td>
</tr>
<tr>
<td>D.1: Policy agenda</td>
<td>Director of Public Policy</td>
<td>New President/CEO, Current team member</td>
<td>Research and first draft: Jan – Jun 2020, Iteration: Ongoing</td>
</tr>
<tr>
<td>D.2: Relationships with government stakeholders</td>
<td>Director of Public Policy</td>
<td>New President/CEO, Policy Intern</td>
<td>Jul 2020 – Ongoing</td>
</tr>
<tr>
<td>D.3: State-based policy work</td>
<td>Director of Public Policy</td>
<td>New President/CEO, Policy Intern</td>
<td>Jul 2021 – Ongoing</td>
</tr>
</tbody>
</table>

*Fundraising
**Learning
***Messaging
### SUMMARY OF NEW POSITIONS DISCUSSED IN THE STRATEGIC PLAN

<table>
<thead>
<tr>
<th>Position</th>
<th>Reports to</th>
<th>Key Responsibilities</th>
</tr>
</thead>
</table>
| Director of Public Policy | President/CEO             | ☐ Serve as a thought leader to President/CEO and select staff  
☐ Execute strategies designed to advance policy agenda  
☐ Cultivate relationships with federal, state, and local leaders |
| Director of Research      | Vice President            | ☐ Develop and refine learning agenda priorities  
☐ Supervise field research activities  
☐ Present synthesized research findings at funders convening |
| Policy Intern             | Director of Public Policy | ☐ Undertake desktop research on relevant policies  
☐ Prepare written progress updates and technical documentation  
☐ Capture notes from various meetings and summarize next steps, follow-ups, etc. |
| Research Intern           | Director of Research      | ☐ Compile the initial list of targeted foundations based on research  
☐ Support desktop research, prepare primers on prospects, etc.  
☐ Track and respond to select email communications with proper oversight  
☐ Maintain any technology used to store the list |
SUMMARY OF FINANCIAL REQUIREMENTS TO IMPLEMENT THE STRATEGIC PLAN
In Addition to Changes Already Included in the 2020 Baseline Budget

<table>
<thead>
<tr>
<th>Initiative Summary</th>
<th>Type</th>
<th>Incremental Expenses (in thousands)</th>
<th>Revenue Source</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>2020</td>
<td>2021</td>
</tr>
<tr>
<td>A.1: Top foundations marketing</td>
<td>Travel</td>
<td>10</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>Collateral</td>
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<td>5</td>
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<td></td>
<td>Staff compensation (intern)</td>
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<td>A.2: Speaking engagements</td>
<td>Travel</td>
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<td>25</td>
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<tr>
<td>B.1: Growing consulting practice</td>
<td>Consulting services</td>
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<td></td>
<td>Contribution offset (30%)</td>
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<td>-8</td>
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<td></td>
<td>Marketing</td>
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<td>15</td>
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<td>B.3: Bolster online resources</td>
<td>Website</td>
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<tr>
<td>B.5: Hosting funders convening</td>
<td>Travel, meals and expenses</td>
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<td>20</td>
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<tr>
<td>C.1: Collaborative funding models</td>
<td>Travel</td>
<td>10</td>
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<tr>
<td>D.2: Relationships with government stakeholders</td>
<td>Staff compensation (intern)</td>
<td>40</td>
<td>40</td>
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<tr>
<td>D.3: State-based policy work</td>
<td>Travel</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Internal initiatives</td>
<td>DEI consultant</td>
<td>*</td>
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<tr>
<td></td>
<td>Travel for all staff meetings</td>
<td>10</td>
<td>10</td>
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<td>New full-time/permanent staff:</td>
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<tr>
<td>Director of Public Policy (salary plus benefits and basic expenses)</td>
<td>Staff compensation</td>
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<td>125</td>
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<tr>
<td>Director of Research (salary plus benefits and basic expenses)</td>
<td>Staff compensation</td>
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<td>Total</td>
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<td>215</td>
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Summary by source

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<tr>
<th>Revenue Source</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
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<tr>
<td>General Operations</td>
<td>130</td>
<td>240</td>
<td>245</td>
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<tr>
<td>Restricted grants</td>
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<td>125</td>
<td>125</td>
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<tr>
<td>Fees and Sponsorships</td>
<td>15</td>
<td>55</td>
<td>75</td>
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<tr>
<td>Total (sum-check)</td>
<td>215</td>
<td>420</td>
<td>445</td>
</tr>
</tbody>
</table>

* = Included in 2020 Baseline budget that is being presented to the Board
Note: Excludes strategic plan expenses where there are minor incremental fees, offsetting administrative fees for regranting, etc.
CONTENTS

Summary of insights from research and deliberations

The Center for Disaster Philanthropy’s strategy going forward

Resource requirements for executing the strategy

Appendix: Recommended approach to implementing initiatives
INITIATIVE A.1: TRACK DISASTER FUNDING ACTIVITY AND WHERE CDP STANDS RELATIVE TO THE TOP 500 STAFFED FOUNDATIONS AND THE TOP 200 CORPORATE FOUNDATIONS TO INFORM TARGET MARKETING STRATEGY

Proposed approach

- Determine the most current list of top 500 staffed foundations and top 200 corporate foundations
- Capture each foundations’ disaster funding activity leveraging partnership with Candid
- Within this list, categorize and track the foundations as follows:
  - **Active partner**: A current CDP client or significant contributor of CDP’s programs or funds
  - **Positive working relationship**: Engages with CDP, but not yet at the level CDP would like
  - **On their radar**: Knows of CDP, but have not yet used CDP’s services in the past three years / ever
  - **No connection**: CDP has not reached out to the organization or previous outreach has not yielded a response
  - **Not interested** (in working with CDP): Explicitly expressed that they do not intend to use CDP’s services for the time being
- Track and continuously edit this list (see next page for suggested approach), aiming to work the full list by December 2022
- Report progress quarterly to CDP’s Board

Staffing requirements:
- **Lead**: Laura Starr
- **Supporting role**: Research Intern
- **Support for messaging and collateral development**: Melanie Davis-Jones
- **Oversight**: Regine Webster

Financial requirements:
- **Incremental travel budget**: $10K in 2020, $20K each in 2021 and 2022
- **Incremental collateral budget**: $5K per year
- **Summer Research Intern**: $10K annually

Timeline:
- Jan 2020 – Dec 2022
# Suggested Approach for Tracking Relationships

First Line is an illustrative example.

<table>
<thead>
<tr>
<th>Name</th>
<th>Assets ($M)</th>
<th>3-Year Average Disaster Giving ($M)</th>
<th>Relationship Owner</th>
<th>Status of CDP Relationship</th>
<th>Past Actions / Notes</th>
<th>Next Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation 1</td>
<td>40,000</td>
<td>10.0</td>
<td>Laura Starr</td>
<td>On their radar</td>
<td>Emailed POC on 11/5/2019</td>
<td>Follow up on 1/31/2020</td>
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<tr>
<td>Foundation 2</td>
<td>20,000</td>
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<td></td>
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</tr>
<tr>
<td>Foundation 3</td>
<td>10,000</td>
<td>4.0</td>
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</tr>
<tr>
<td>Foundation 4</td>
<td>5,000</td>
<td>0.0</td>
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</tr>
<tr>
<td>Foundation 5</td>
<td>2,500</td>
<td>3.0</td>
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</tr>
<tr>
<td>Foundation 6</td>
<td>1,000</td>
<td>5.0</td>
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<tr>
<td>Foundation 7</td>
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<td>Foundation 8</td>
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<td>Foundation 9</td>
<td>100</td>
<td>1.0</td>
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<td>Foundation 10</td>
<td>50</td>
<td>0.5</td>
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</tbody>
</table>
INITIATIVE A.2: CONTINUE TO PURSUE REGULAR SPEAKING ENGAGEMENTS WITH VARIOUS PHILANTHROPY INTERMEDIARIES (E.G., REGIONAL ASSOCIATIONS AND AFFINITY GROUPS), LEVERAGING INSIGHTS FROM THE STATE OF DISASTER PHILANTHROPY AND CDP’S FIELD EXPERIENCE

Proposed approach

- Perform an online scan of regional associations, affinity groups, professional associations, and other philanthropy and community intermediary events (e.g., NVOAD conference) to compile a schedule of potential speaking engagements (for the next 6 to 12 months), in addition to the events at which CDP has been personally invited to speak
- Reach out to appropriate point of contacts to confirm speaking engagements, and coordinate which senior staff will speak at which events
- Develop consistent messaging for speaking and networking / pipeline development using the SODP and storytelling from local experience
- Track which events yielded clients and/or donors and prioritize speaking at those events again at the next available opportunity

Staffing requirements:
- Lead/coordinator: Melanie Davis-Jones
- Speakers: New President/CEO, Board members, Kim Maphis Early, Sally Ray, Regine Webster

Financial requirements:
- Travel costs: $25K per year (10 – 15 events)

Timeline:
- Ongoing
INITIATIVE A.3: ENGAGE ON SOCIAL MEDIA AND PARTICIPATE IN INTERVIEWS WITH BROADCAST AND PRINT JOURNALISM BEFORE, DURING, AND AFTER MAJOR DISASTERS IN ORDER TO REACH A BROADER DONOR AUDIENCE

Proposed approach

- Engage on social media to create continued awareness on the long-tail of disasters for broad audiences and drive followers/users to CDP’s other online resources (website, webinars, eNewsletters, Playbook, etc.) to learn more
- Determine the appropriate point of contact at the Weather Channel/AccuWeather, major newspapers (e.g., Houston Chronicle, LA Times, Miami Herald, New York Times, the Washington Post) NPR, local NPR affiliates (particularly in disaster-prone markets), and trade-specific publications (e.g., Chronicle of Philanthropy) to (re)introduce CDP and discuss the potential for being featured on interviews
  - If needed, draft language for printed publications for approval
- During interviews, focus on sharing insights unique to CDP and position CDP as the “go-to” resource for knowledge/research (Playbook, SODP, webinars, etc.) and giving with consistent messaging around the importance of resilience, preparation, and recovery
- Request data from the broadcast or media channel on viewership to understand the extent of the audience reached

Staffing requirements:
- Lead/coordinator: Melanie Davis-Jones
- Speakers: New President/CEO, Kim Maphis Early, Sally Ray, Regine Webster

Financial requirements:
- Minimal (maybe some incremental) travel costs

Timeline:
- Ongoing
INITIATIVE B.1: GROW THE CONSULTING PRACTICE TO REACH MORE OF THE PHILANTHROPY MARKET, PRIORITIZING LEAD DEVELOPMENT AND ADDING FLEXIBLE CAPACITY TO UNDERTAKE ASSIGNMENTS (THROUGH CONTRACTORS, CONSULTING PARTNERS, ETC.); MAINTAIN STRONG MARGINS

Proposed approach

- Closely track and take timely action on lead development from initiatives A.1 and A.2
- Building on the results of upcoming hosted dinners to market CDP’s services, undertake two to four targeted marketing events to introduce CDP and its services to new audiences
- Codify the most salient aspects of CDP’s approach and work product in order to facilitate training of staff/contractors and ease proposal writing
- Utilize additional staff/contractors to complete more of the business development and proposal writing (reducing burden on Regine)
- Seek out partnerships with other capable consultancies to have flexible capacity on hand, if needed
- At least once per year, examine – and if needed, update – consulting fees to ensure desired margins are being realized

Staffing requirements(1):

- Lead: Regine Webster
- Support: Brittney Brown, Kim Maphis Early, Sally Ray, additional consultants as needed
- Lead for marketing events: Melanie Davis-Jones

Financial requirements:

- Grow 5%+ annually, based on $550K in 2020 budget
- Incremental costs covered by revenues; 30% margin
- Marketing expenses: $15K per year (covered by sponsorship)

Timeline:

- Ongoing

(1) Should CDP experience dramatically more rapid growth than projected, there may be a need to bring on additional senior capacity to undertake oversight and performance of projects
INITIATIVE B.2: DEFINE A LEARNING AGENDA THAT CAN YIELD RESEARCH PRODUCTS (E.G., CASE STUDIES) THAT SHOWCASE THE BENEFITS OF RESILIENCE AND PREPARATION, AND HIGHLIGHT EFFECTIVE RECOVERY PRACTICES – PARTICULARLY THOSE THAT LEAD TO EQUITABLE OUTCOMES

Proposed approach

• Develop a proposed research plan document (i.e., a “learning agenda”) including the questions CDP wants to answer through a case study or other mechanism. Examples include:
  – How much money was truly needed in relief efforts? How much excess was there that could have been applied to recovery?
  – What level of resources would it have taken to fully help everyone in vulnerable neighborhoods through the disaster?
  – Was there improvement in recovery time (from a prior comparable disaster to this disaster)? To what extent?
  – How should we track and measure community resilience?
• Utilize the research plan to seek out funders willing to pay for research / knowledge generation
• Conduct research, aiming for two to four research deliverables (interim or final papers/presentations) annually
• Disseminate findings from the research through a variety of means, including:
  – Conference presentations
  – Sessions for DAF hosts
  – Publications or op-ed pieces in major periodicals

Staffing requirements:
• Lead – Learning Agenda: Regine Webster
• Lead – Execution: Director of Research
• Support: Brennan Banks, Nancy Beers, Sally Ray (additional capacity needed?)
• Dissemination Support: Melanie Davis-Jones

Financial requirements:
• Cost of any professional evaluation / research tools would be covered by restricted grants

Timeline:
• Learning agenda / secure funding: Jan – Jun 2020
• Undertake research: Jul 2020 – Ongoing
INITIATIVE B.3: BOLSTER ONLINE RESOURCES TO ENSURE EASE-OF-USE AND TO FACILITATE DEEPER ENGAGEMENT WITH CDP’S WORK

Proposed approach

- Develop online tutorial(s) on how best to use signature resources such as the Disaster Playbook in order to nurture greater use
  - Tutorial(s) should be posted in a logical place for the end-user (e.g., at the top of the resource webpage)
  - Consider if a more streamlined version of the Disaster Playbook would be valued by a subset of constituents
- Administer brief user surveys to determine specific improvements that can be made to online resources
  - Send out a follow-up survey after updates are made to the online resources
- Consider website enhancements that streamline the user’s experience
  - Assess the integration of website pages; determine if pages are appropriately/sensibly linked; consider strategic plan goals as an organizing frame
  - Add a section on “New to CDP? Click Here”

Staffing requirements:
- Lead: Tanya Gulliver-Garcia
- Support: Melanie Davis-Jones and Regine Webster

Financial requirements:
- Website upgrade: $10K one-time

Timeline:
- Jan – Dec 2020
INITIATIVE B.4: CONTINUE TO USE WEBINARS, eNEWSLETTERS, AND SOCIAL MEDIA TO DISSEMINATE INSIGHTS, SUSTAIN INTEREST, AND PROMOTE CDP’S OTHER OFFERINGS

Proposed approach

- Continue to offer a compelling webinar series capitalizing on learning from research, field presence, and achievements of philanthropic partners
  - Work closely with sponsors to promote webinars to funders and major donors through their networks
  - Begin/end each webinar with consistent messaging around CDP’s offerings (i.e., consulting, re-granting)
- Per the communications plan, seek to develop fewer/more focused eNewsletters including any key impact measures and success of CDP’s offerings
- Track and analyze attendance to webinars and click-through rates on eNewsletters and capture the profile of participants, noting any changes/improvements over time (including any new participants)
- Leverage social media to share targeted learnings

Staffing requirements:
- Lead: Ruja Entcheva
- Support: Melanie Davis-Jones
- Content provided by various programmatic staff

Financial requirements:
- No incremental funding expected

Timeline:
- Ongoing
INITIATIVE B.5: HOST A FUNDERS CONVENING TO SHARE LEARNING AND BUILD COMMUNITY, WITH AN EYE TOWARDS ESTABLISHING A “FIELD” OF DISASTER PHILANTHROPY

Proposed approach

• Capitalizing on existing convenings (e.g., Gates Foundation event) with a handful of philanthropies in this space
  – Target 25 – 35 attendees
  – Start with 1-day conference
• Utilize learning agenda from initiative B.2 to drive content selection
• Outsource the logistics
• Over time, aim to cover costs through 50% attendee fees and 50% through sponsorship (initially, while the conference is small, fees will cover less than 50%)
• Projected costs: $20K
  – 30 attendees: $200 for meals and expenses ($6K)
  – 3 guest speakers: $1K honoraria, $1K travel/expenses ($6K)
  – 8 staff: $800 travel plus $200 for meals and expenses ($8K)
• Projected revenues: $20K+
  – 30 attendees x $300 per person: $9K
  – Sponsorship: $11K+

Staffing requirements:
• Lead: Laura Starr
• Support: New President/CEO, Melanie Davis-Jones, Regine Webster, Director of Research, others as needed

Financial requirements:
• $20K in expenses, offset by attendee fees and sponsorships

Timeline:
• 2021 – Ongoing (annual)
INITIATIVE C.1: PURSUE ROLL-OUT OF COLLABORATIVE FUNDING MODELS FOR RESILIENCE AND EARLY RECOVERY IN 3 TO 5 STATES AND/OR REGIONS, MARKETING THE SUCCESS OF PPREP, ERF AND LDRA

Proposed approach

- Delineate criteria for assessing potential for a collaborative funding model; develop this into a basic tool for in-house use
- Conduct research on select states/regions (outside PPREP, ERF, and LDRA states)
  - Drawing from CDP’s expertise and field presence, use the in-house tool to assess which states/regions offer the best opportunities for collaborative funding; this would include consideration of philanthropic resources and coordination in the selected geography
  - Consider New York and California as those two states have most of the top 100 foundations; Texas could also be promising as CDP has had relationships there through Hurricane Harvey funding
  - Present the case for pursuing certain states/regions to CDP’s Board and come to an agreement on which states/regions to target
- Meet with philanthropic leaders in the targeted states/regions to “sell” them on the concept and long-term value of this approach; seek ~3-year funding commitments
- Continue this approach with other states/regions, seeking to be undertaking one or two collaborations at any point
- Capture learning for dissemination and to support expansion

Staffing requirements:
- Lead: Regine Webster
- Support: Nancy Beers, Kim Maphis Early, additional staff for other opportunities
- Fundraising: Laura Starr
- Learning: Director of Research

Financial requirements:
- Travel – meetings with philanthropic leaders in potential states/regions (during research phase): $10K
- Once solidified, program costs would be covered by funder(s)

Timeline:
- Research and funding: Jan – Jun 2020 (or when realized)
- Implementation: Jan 2021 – contract completed

CDP Strategic Plan 2019-11-13 vF

- 44 -
INITIATIVE C.2: SUSTAIN FIELD PRESENCE AND REGRANTING ACTIVITY THROUGH EVENT-SPECIFIC RECOVERY POOLING FROM INSTITUTIONAL FUNDERS AND MAJOR DONORS

Proposed approach

• Assess whether CDP has connections and/or presence in the “right” geographic areas
  – Determine the short list of areas based on historical experience with disasters
  – If there is a gap, seek to develop relationships in that area with direct service providers
  – Consider placing a CDP staff member / contractor if at least two years of funding is secured
  – To cover geographies outside of North America, seek formal partnerships with organizations working in target geographies
• Perform regular (~semi-annual) site visits to gain up-to-date knowledge on impact of regranting
  – Conduct research with grantee partners during site visits to capture impact, satisfaction, and efficiency metrics to facilitate learning and reporting to donors
• Consider distinguishing funds to be disaster-specific rather than generalized funds in order to facilitate emotional connection between the donor and the disaster’s victims

Staffing requirements:
• Lead: Regine Webster
• Support: Brennan Banks, Nancy Beers, Sally Ray, additional staff for other locations of interest
• Fundraising: Laura Starr
• Learning: Director of Research

Financial requirements:
• Administrative fee earned on funds managed would be used to cover staff costs, travel, evaluation, etc.

Timeline:
• Ongoing
INITIATIVE C.3: SELECTIVELY PURSUE MASS MARKET FUNDRAISING OPPORTUNITIES (E.G., POINT-OF-SALE PARTNERSHIPS WITH RETAILERS, SOCIAL MEDIA CLICK-THROUGHS), BOTH IMMEDIATELY FOLLOWING A HIGH-PROFILE DISASTER AND FOR SUPPORT TO AREAS THAT STILL REQUIRE RECOVERY FUNDING WELL AFTER THE DISASTER OCCURRED

Proposed approach

• Through published information, determine the top 25 retailers and the top social media / technology companies where a partnership with CDP may be mutually beneficial (building on relationships and experiences with Facebook, Google, Columbia Sportswear, etc.)

• Seek agreements with at least five retailers and two social media companies; manage relationships to ensure CDP is top of mind when it comes to disaster recovery funding

• Develop and maintain up-to-date messaging for use with the next major disaster

• Periodically (~2x to 4x per year) undertake campaigns to raise funds for prior disasters that still require funding to address the needs of vulnerable populations (e.g., “Many Hurricane Harvey victims still need long-term housing. Please support CDP’s Hurricane Harvey Fund”)

• Ensure the technology is in place and set up to collect donations from individuals
  – Have monthly, recurring giving option available to keep individuals engaged for the longer term

Staffing requirements:
• Lead: New President/CEO
• Support: Laura Starr
• Messaging: Melanie Davis-Jones

Financial requirements:
• No incremental funding expected

Timeline:
• Set up relationships: Jan 2020 – Jul 2021
• Maintain/leverage: Ongoing
INITIATIVE D.1: DEVELOP AN INITIAL POLICY AGENDA FOR AFFECTING HOW GOVERNMENT DOLLARS AND OTHER RESOURCES ARE DEPLOYED IN THE WAKE OF DISASTERS

Proposed approach

- Based on in-house knowledge and desktop research, identify which policies CDP may be able to influence in the coming years. For example:
  - Stafford Act overall
  - Stafford Act amendments, including the Disaster Mitigation Act of 2000, Federal Disaster Assistance Nonprofit Fairness Act of 2013, and Disaster Recovery Reform Act of 2018
  - FEMA’s Federal Insurance and Mitigation Administration (FIMA) including national flood insurance
- Draft preliminary policy agenda (one- to three-page document) and review with CDP’s Board
- Iterate periodically (at least once per year), as CDP gains more knowledge and understanding
- Note: This document would be for internal use only in the near-term

Staffing requirements:
- Lead: Director of Public Policy
- Support: New President/CEO
- Targeted research: Current team member (Natalie? Tanya?)

Financial requirements:
- No incremental funding expected

Timeline:
- Research and first draft: Jan – Jun 2020
- Iteration: Ongoing
INITIATIVE D.2: ESTABLISH WORKING RELATIONSHIPS WITH KEY FEDERAL GOVERNMENT STAKEHOLDERS TO MESSAGE CDP’S LEARNING AND CALL TO ACTION

Proposed approach

- Assess and build on relationships CDP already has with government stakeholders
  - Conduct meetings with these stakeholders to determine disaster response processes and where CDP could potentially fit in
  - Examine what networking opportunities are available to meet other key government stakeholders through these current relationships
- Once relationships begin to solidify, seek to become a mainstay presence and to engage stakeholders with CDP’s other audiences
  - Attend any relevant public meetings (virtual and in-person), where possible
  - Invite key government stakeholders to speak on CDP webinars
  - Seek opportunities to address policymakers’ staff

Staffing requirements:
- Lead: Director of Public Policy
- Support: New President/CEO, Policy Intern

Financial requirements:
- Policy Intern: $30K (+$10K in benefits) annually starting in Jul 2021

Timeline:
- Jul 2020 – Ongoing
INITIATIVE D.3: TARGET ONE OR TWO STATES FOR STATE-BASED WORK AND LEARNING, AND EXPLORE OPPORTUNITIES FOR POLICY ENHANCEMENTS AND PUBLIC/PRIVATE PARTNERSHIPS

Proposed approach

- Conduct initial research and determine which state government(s) to target. Consider a range of factors including:
  - The state sees themselves as vulnerable to disasters
  - Where CDP already has strong local connections
  - Quality of any state legislature guiding the actions of disaster response
  - There’s already some momentum towards improving preparation and response to disasters
- Leveraging philanthropic relationships (if applicable), reach out to state government stakeholders in the targeted states
  - Employ tactics similar to those specified in initiative D.2 for increasing presence and influence
- Where feasible, explore the possibility of fueling the creation and/or growth of public/private partnerships
  - On the public side, coordinate with State Office of Emergency Management (OEM) and similar state government entities
  - On the private side, coordinate with state VOADs, other corporations headquartered in that local area, etc.

Staffing requirements:
- Lead: Director of Public Policy
- Support: New President/CEO, Policy Intern

Financial requirements:
- Travel costs: $10K

Timeline:
- Jul 2021 – Ongoing