

Winona Community Foundation

2021 Business Plan and Goals

Name: Nancy M. Brown

Date: January 11, 2021

Goal 1: Meet or exceed funds raised

Target: \$75,000

Actions:

- Develop a solicitation timeline to complete annual appeal prior to November 15
- Communicate operating fund as a gift option to fundholders via quarterly newsletter
- Establish a community endowment fund

Goal 2: Increase number of funds

Target: 3 new donor advised funds

3 new "other" funds

Actions:

- Conduct 6 small group conversations with potential fund advisors (hosted by board members or other friends of the Foundation)
- Complete 10 face-to-face (or other method of meaningful dialog) monthly with potential fund advisors, professional advisors, nonprofit organizations
- Implement Charitable Investment Partner Program
 - Target: 3 new Charitable Investment Partners

Goal 3: Increase community awareness of Winona Community Foundation activities and accomplishments

Target: 6 new funds

Actions:

- Execute marketing and communication plan including:
 - "In the Know" appearances
 - One press release per month
 - Winona Post Professional Forum
 - Social media plan
 - Website contains current news and useful information
 - Produce and distribute annual impact report by April 30
- Founders Award event
- Golf Outing

Goal 4: Community engagement activities

- Attend, participate in 24 community activities annually (includes activities such as annual banquets, listening sessions, chamber sponsored events, nonprofit special events, etc.)
- Serve on leadership team of Nonprofit Roundtable
- Facilitate/lead workplace giving program

Goal 6: Launch a planned giving initiative

Target: Identify at least 10 new individuals/couples by Founders Event

Actions:

- Build out a website focused on planned giving
- Create a recognition society with a distinct name and brand
- Collaborate with local professional advisors to inform/educate
- Implement a charitable gift annuity program

Goal 7: Improve fund holder experience and interactions with the Winona Community Foundation while enhancing relationship management.

Target: All fund holders have access to the fundholder portal by October 1, 2021

Action Steps:

- Pilot handful of fund holders by April 1, 2021
- Roll out to all fund holders July 1, 2021
- Quarterly statement newsletter

Goal 5: Improved governance and operations

Target: Employee handbook revised and approved by end of second quarter

Target: Renew National Standards for Community Foundations

Action Steps:

- Contemporize employee handbook, policies, and procedures
- Provide timely employee evaluations
- Update and review policies on a scheduled basis