

# Strategy: One-Page Strategic Plan (OPSP)

Natividad  
Foundation  
2022-2023

## People (Reputation Drivers)

### Employees

1. President & CEO
2. Development (Dir, Annual Programs, Support)
3. Program

### Donors

1. The Agricultural Leadership Council
2. Major Donors
3. Foundations

### Stakeholders

1. Natividad
2. Monterey County Board of Supervisors
3. Monterey County Residents

Core Values/Beliefs (Should/Shouldn't)	Purpose / Mission (Why)	Vision / Goals (2 yrs.) (Where)	Objectives (1 yr.) (What)																						
<ul style="list-style-type: none"> <li>DO deliver on donor promises (<i>build trust</i>)</li> <li>DO tell donors if things aren't going as planned (<i>maintain integrity</i>)</li> <li>DO establish clearly defined partnership with hospital and Foundation roles &amp; responsibilities to successfully cultivate and steward major donors (<i>grow revenue</i>)</li> <li>DO measure and share impact (<i>expand reach</i>)</li> <li>DO be encouraged and work toward new processes in partnership with Natividad to fulfill donor intent (<i>strengthen fundraising</i>)</li> </ul>	<p><b>Mission</b> Natividad Foundation brings people together to strengthen Natividad and create a healthier community.</p> <p><b>Tag Line</b> Transforming health care into healing</p> <p><b>Vision</b> Natividad Foundation is an <b>essential partner</b> to Natividad and provides financial and program resources the Hospital needs to enhance its health care services.</p>	<table border="1"> <tr> <td>Future Date</td> <td>12-31-23</td> </tr> <tr> <td>Revenues</td> <td>\$3,568,517</td> </tr> <tr> <td>Impact</td> <td>GuideStar Seals</td> </tr> <tr> <td>Image</td> <td>Essential Partner</td> </tr> </table> <p><b>Big Ideas</b></p> <ul style="list-style-type: none"> <li>Develop donor pool to support toward \$300M ED Tower</li> <li>Secure largest gift in Foundation history</li> </ul> <p><b>Brand Promises</b></p> <ul style="list-style-type: none"> <li>Donor intent fulfilled on time and on budget</li> <li>Donors see impact of \$ and integrity w/ use of \$</li> <li>Donors valued and thanked</li> </ul>	Future Date	12-31-23	Revenues	\$3,568,517	Impact	GuideStar Seals	Image	Essential Partner	<table border="1"> <tr> <td>Year Ending</td> <td>2022</td> </tr> <tr> <td>Philanthropy</td> <td>\$1,740,740</td> </tr> <tr> <td>Gov't Grants</td> <td>\$576,876</td> </tr> <tr> <td>Earned Income</td> <td>\$40,000</td> </tr> <tr> <td>Cost to Raise/\$</td> <td>\$0.20 (\$463,523)</td> </tr> <tr> <td>\$ to hospital</td> <td>\$720,000</td> </tr> <tr> <td>\$ on behalf of hospital (e.g., Foundation operations, CHOICE, chaplains, palliative care, breast cancer, patient needs)</td> <td>\$1,020,740</td> </tr> </table>	Year Ending	2022	Philanthropy	\$1,740,740	Gov't Grants	\$576,876	Earned Income	\$40,000	Cost to Raise/\$	\$0.20 (\$463,523)	\$ to hospital	\$720,000	\$ on behalf of hospital (e.g., Foundation operations, CHOICE, chaplains, palliative care, breast cancer, patient needs)	\$1,020,740
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	<p><b>KPIs 1 (Leading indicators)</b></p> <ul style="list-style-type: none"> <li>Fully staffed organization</li> <li>Board, admin. &amp; manager donations (% &amp; \$)</li> <li># donors and average gift size ↑</li> </ul>	<p><b>KPIs 2 (Trailing indicators)</b></p> <ul style="list-style-type: none"> <li>\$5 ROI per \$1 spent</li> <li>\$0.20 to raise a dollar</li> <li>\$720,000 cash/assets to hospital</li> <li>Move up Meyer DEI scale</li> </ul>	<p><b>Critical #: Process</b></p> <p>\$297,380 UR net revenue</p> <p>\$1,443,360 R net revenue</p>																						

### Strengths/Core Competencies

1. Recognized as trustworthy; high integrity
2. Consistent and generous core donor pool
3. Adaptable to continuous changes in environment
4. Expert hospital administrative team willing to partner

### Opportunities

1. Diversity, Equity & Inclusion / Social Justice = \$
2. Strategic Community Relations = Effective Partnerships
3. Trillion-dollar wealth transfer
4. Hospital ↑ standards - e.g., master facility plan
5. Diverse donors (race/ethnicity, generational, etc.)
6. Create Philanthropy Leadership Team within hospital
7. Optimize processes in partnership w/ Natividad to fulfill donor intent

### Weaknesses

1. Competition: 3,279 other Monterey County nonprofits
2. Must raise operating support annually
3. Few high-net-worth major donors
4. Overdue Foundation deliverables (fundraising infrastructure): donor recognition, planned giving

### Threats

1. Pandemic-related delayed deliverables (e.g., Infusion Center project relies on space used multiple times each week for vaccine clinics)
2. Donors: Keep, return or reallocate gifts