Introduction

This strategic plan framework serve to guide the growth and development of the Community Foundation for San Benito County in the coming years. With a record of accomplishment, growing community visibility and deep commitment from a diverse group of community leaders, the Community Foundation anticipates continuing growth in its philanthropic assets, expanded involvement of the San Benito community in its work, and ever-increasing impact on priority community needs.

Based on the continued use of practical planning assumptions, this framework outlines the Community Foundation’s business environment, its institutional mission, its core values (Inclusiveness, Respect, Leadership, Integrity, and Building for the Future) as a philanthropic resource, and its strategic operating priorities through 2025.

Situation Analysis

Since its creation in 1992, the Community Foundation for San Benito County has grown as a local philanthropic resource, providing much-needed funding to community-based nonprofit organizations and offering a charitable giving resource for local donors concerned about the long-term well-being of San Benito County and its residents. Long a volunteer-run operation, the Community Foundation has grown over the years to include a small, paid professional staff, increasing its capacity to raise and distribute charitable funds, serve donors and create positive changes across San Benito County. Specifically, in the past one to two years, the Community Foundation identifies the following as key accomplishments:

- Distribution of over $1,039,000 in grants and scholarships during fiscal year 2020;
- Funding to over 60 local nonprofit organizations to address community need;
- Growth of the Asset Development framework, including planned giving and donor outreach;
- Increase assets by over $9M since year-end 2019;
- Focus on diversification of the Board of Directors to reflect the diversity of San Benito County;
- A focus on proactive grant making to augment the responsive approach that has historically characterized the Community Foundation’s giving;
- The activation of a disaster relief fund for San Benito County to address COVID-19 relief efforts;
- The growth of the Women’s Fund endowment to $185,000 and subsequent Women’s Fund grant making for San Benito County through the Foundation grants committee;
• Growth of the Latino Generations Endowment Fund to $180,000 that focuses on advancing Latino Community leadership and civic engagement through investment in the future with scholarship awards to students seeking higher education;
• The success of the Community Foundation’s public celebration of National Philanthropy Day and the resulting increase in the Foundation’s visibility among key audiences;
• Establishment of sound financial reporting, investment practice and overall organizational transparency;
• Establishment and functioning of community-based volunteer grant making committee;
• The procurement of a permanent building site and construction of a philanthropic center to house the Foundation, Nonprofits and provide community meeting spaces.

Strategic Priorities 2021-2025

As it continues on its path towards organizational sustainability, greater impact and higher visibility, the Community Foundation will continue its core operations, expanding and allocating resources (money, staff, volunteer time) towards its mission. As it continues to grow, the Community Foundation will maintain a clear focus, and maintain the core values, which have defined its work and successes to date.

As it progresses over the next several years (2021-2025), the Community Foundation will maintain its current functions and operations, ensuring the long-term viability of the organization. During this period, the Foundation will place emphasis on several strategic priorities designed to support and facilitate its continuing growth.

The community foundation identifies the following priorities for 2021-2025:

Build the Epicenter Philanthropic Center

To provide a permanent home for the Community Foundation for SBC
To provide co-location, meeting and gathering space for local nonprofit organizations
To cement the Community Foundation for SBC as the Epicenter of philanthropic activity in the county and a physical representation of a legacy of giving.

• Hold a series of receptions, grand opening, and open houses to introduce the community to the Epicenter and its purpose
• Leverage the building opening with nonprofit stories to engage the community
• Co-locate with local nonprofit organizations to help cover the operating costs of the building on an annual basis
• Become the location of choice for nonprofit meetings, events, and education

Build the Community Foundation’s assets

To move towards sustainability
Increase the endowment
Increase planned gifts/bequests
To increase the impact of the Community Foundation

• Expand current asset development efforts with individual donors/families
• Continue to reach out to professional advisors
• Leverage opportunities to increase the Foundation’s visibility and reputation
• Build a dynamic, sustainable and realistic business plan; adjust annually

Serve as a key resource for local nonprofit organizations

To encourage greater nonprofit effectiveness and efficiency
To encourage sustainable nonprofit infrastructure
To ensure that a broad range of community needs are addressed

• Offer technical assistance and training (nonprofit capacity-building)
• Provide strategic, mission-focused funding
• Provide a forum for collaboration and peer learning

Continue to develop the community foundation's grant making

To maximize the impact of philanthropic investments
To anticipate issues that will affect community needs
To attract new donors and funders, growing the community’s charitable resources

• Increase strategic focus of the grants
• Continue proactive and initiative-based grant making
• Expand opportunities to “leverage” the community foundation’s grants

Expand the Foundation’s role as a community leadership organization

To identify and mobilize the community around prioritized needs and issues
To establish the Community Foundation as a valued resource for community support and change.

Establish a Community Leadership Program

• Convene on key issues while avoiding deeply divisive matters
• Build relationships with key community stakeholders to grow awareness and trust
• Ensure inclusivity in all aspects of the community foundation’s work

Grow the Disaster Relief Fund

• Work with the Center for Disaster Philanthropy to complete a disaster readiness workbook to serve as a resource in response and recovery efforts.
• Develop a plan to respond to and recover from local disasters.
• Secure pledges from businesses, government, and private entities.

Summary

The Community Foundation for San Benito County will continue its growth and maturation as an effective, sustainable community philanthropy organization. The Foundation’s infrastructure is solid and its visibility and reputation are steadily growing. The priorities for the coming years are a sensible approach to the ongoing development of the community foundation as a philanthropic resource for San Benito County and its residents.

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