



NOTE: The Community Foundation will budget and plan for a renewed strategic planning session and Board Approved Plan in 2023 to begin in 2024

STRATEGIC PLAN 2019-2023

Our Mission

We grow community giving.

Our Vision

A philanthropic and engaged Loudoun and Northern Fauquier citizenry in support of a healthy and thriving community.

Our Core Values

We respect the philanthropic vision of our donors.
We value and steward their generosity.

We respect the mission of nonprofits.
We honor the passion they bring to their diverse causes.

We earn the trust of our grantees, donors, and partners through
transparency, accountability, and excellence.

We embrace racial equity, inclusion, and unity in diversity in all our work.

Our Strategic Goals

The Community Foundation will promote **LEADERSHIP** and serve as a strategic leader for positive change in the communities we serve.

As a **GRANTMAKER**, the Community Foundation will grow community endowment and diversify its sources of funding, develop cost-effective business strategies, and make funding decisions that are aligned with our donors' wishes and in the best interest of the communities we serve.

The Community Foundation will invest in **PARTNERSHIPS** for a better community through education, collaboration, and communication.

Our Strategic Objectives & 2022 Workplan

Goal 1

The Community Foundation will promote **LEADERSHIP** and serve as a strategic leader for positive change in the communities we serve.

Objectives:

- Identify key community issues that the Community Foundation can impact and support through innovation and advocacy.
- Provide learning, coaching, and networking opportunities that benefit and strengthen our nonprofits and their leaders through our programs and new nonprofit training center.
- Serve as the local voice for philanthropy raising awareness of the need in the communities we serve.
- Serve as the leading source of philanthropic knowledge in our community.
- Strengthen our presence and develop customized strategies to better serve the donors and nonprofits of Loudoun and Northern Fauquier County.

Initiative Name: Nonprofit Academy

Measure of success: 100 nonprofit professionals will participate in one or more of four Nonprofit Academy trainings in 2022; 90% of participants will increase their knowledge, skills, or abilities in the areas of nonprofit management, resource development, or outreach/marketing.

Task	Timeframe	Who	Resources/Updates
Identify topics and speakers for each quarterly workshop	January-October 2022	Nicole Acosta	
Schedule workshops in partnership with the Loudoun Chamber	January-October 2022	Nicole Acosta	
Announce workshop availability per quarter and collaborate with Chamber staff coordinating registration	Ongoing throughout year	Carol Moore Nicole Acosta	
Implement and execute four quarterly educational workshops for 30-50 participants per session using the Claude Moore Nonprofit Training Center or Zoom	Quarterly throughout year	Nicole Acosta	
Tabulate and analyze evaluation results	At conclusion of each quarterly workshop	Nicole Acosta	

Initiative Name: Social Impact Institute – Board Chair Roundtable

Measure of success: 6 nonprofit board chairs will participate in the SII Board Chair Roundtable program in 2021-2022, providing 6, monthly group educational sessions focused on Board leadership. 90% of program participants will report that participation in the SII program increased their leadership development skills.

Task	Timeframe	Who	Resources/Updates
Continue with Board Chair Roundtable sessions that began in November 2021	January – April 2021	Nicole Acosta	
Collect program evaluations and participation data; analyze data	Conclusion of six-month program in April 2021	Nicole Acosta	
Program will rest for remainder of 2022; will re-evaluate renewing program for 2023	Late 2022	Amy Owen Nicole Acosta	

Initiative Name: Social Impact Institute – Advancing Development

Measure of success: 5 directors of development will participate in a 6-month program with Cris Wineinger that includes weekly, one-on-one meetings with assessing their organization's development practices, and monthly meetings as a learning cohort. 90% of program participants will report that participation in the SII program increased their knowledge, skills and abilities in the areas of development and nonprofit fundraising, including donor cultivation, DEI in fundraising, and best practices.

Task	Timeframe	Who	Resources/Updates
Secure consultant (Cris Wineinger)	October 2021	Amy Owen	Offset funding
Schedule the program	Tentatively July - December		Determine participant fee

Initiative Name: Social Impact Institute – Learning Lab

Measure of success: Approximately 50 nonprofit professionals will participate in two, one-day “deeper dive” learning workshops offered in 2022; 90% of participants will report increased knowledge/skills/abilities in the topics presented during trainings.

Task	Timeframe	Who	Resources
Announce and collect registrations for workshops	As needed	Carol Moore	
Host full-day workshop, “Board Governance 101,” targeting those serving on Boards of Directors and Executive Directors	May 2022	Amy Owen Nicole Acosta	Program fees offset by registration fees

Host one full-day workshop “Grantor Research and Grant Writing 101”	August 2022	Amy Owen Nicole Acosta Sapna Hencinski	Program fees offset by registration fees
Collect and analyze program evaluation data	At conclusion of each program	Nicole Acosta	

Initiative Name: Racial Equity Framework – The Onion Dialogues

Measure of success: 24 nonprofit leaders and community members comprised of government partners, nonprofit leaders, and community changemakers will participate the REF The Onion Dialogues workshop (2 workshops to be offered in 2022), to explore topics including race, racism, white privilege, and microaggressions. 90% of participants will report that participation in the workshop increased their knowledge of race, racism, and racial equity.

Task	Timeframe	Who	Resources/Updates
Complete contract with Tamara Copeland	December 2021	Amy	Offset funding
Announce dates and collect registrations	January 2022 July 2022	Carol Moore	Create MOU
Facilitate 2 sessions of the Onion Dialogues	April 2022 September 2022	Amy Owen Tamara Copeland	Using Zoom
Collect and review program data and evaluations	After each session	Nicole Acosta	

Initiative Name: Racial Equity Framework – Dismantling Racism in the Nonprofit Sector

Measure of success: 25 nonprofit leaders will participate the Dismantling Racism in the Nonprofit Sector learning series (8 sessions via Zoom), in partnership with ACT (partner will bring approximately another 25 participants). 90% of participants will report that participation in the workshop increased their knowledge of race, racism, and racial equity.

Task	Timeframe	Who	Resources/Updates
Find partner (pursuing ACT)	January 1, 2022	Amy	
Secure presenters	January 1, 2022	Amy	
		Amy	Secure offset funding
Create timeline Create calendar announcement			July - December

Initiative Name: Philanthropy Summit

Measure of success: 100 attendees will participate in the Philanthropy Summit in 2022; 90% of attendees will report increased knowledge of local needs addressed during Summit presentations.

Task	Timeframe	Who	Resources
Convene a Summit planning group. Potential Topics: to “Growing Up, Growing Old” with focus on early childcare, eldercare, and equity	February 2022	Amy Owen Carol Moore Nicole Acosta	
Secure venue and set date; acknowledge sponsors	March 2022	Amy Owen Carol Moore Nicole Acosta	Seek specific sponsors and offset funding
Secure keynote speakers, workshop leaders, presenters	August 2022	Amy Owen	
Invite and register participants (general public, government officials, CF donors)	August 2022	Amy Owen Carol Moore	
Execute Summit event: event set up and breakdown, check in participants, moderate and Facilitate program; distribute evaluation surveys	October 2022	Amy Owen Carol Moore Nicole Acosta Joe Scott	May be delivered via Zoom; TBD
Collect and tabulate survey evaluation results from all attendees	October 2022	Nicole Acosta	

Initiative Name: Nonprofit Salary Survey

Measure of success: A report is electronically published and made available to nonprofit organizations detailing local nonprofit compensation data. Data will be collected, analyzed and organized by categories such as organizational budget size, scope of work, and staff size.

Task	Timeframe	Who	Resources
Secure consultant to conduct survey and write report (ARM Consulting)		Amy Owen	Need to secure offset funding
Survey is conducted, report drafted	Maybe published by July 2022	ARM	Made available for free to nonprofits
Incorporate report into nonprofit training or provide presentation that include report (Nonprofit Academy, and/or Learning Lab on Board Governance)	TBD once report is completed		

Initiative Name: Loudoun Human Services Network Staff Initiative**Measure of success:** LHSN Program Manager position staff continues to provide staff support to LHSN through 2022; LHSN leadership will report increased coalition effectiveness and collaboration among member nonprofits as a result of staff support.

Task	Timeframe	Who	Resources
Continue providing funding, guidance, and supervision for LHSN Program Manager; LHSN Program Manager continues to provide support to LHSN	Ongoing throughout the year	Nicole Acosta Sapna Hencinski	Funding partnership sought from LHSN membership in 2022

Initiative Name: Faces of Loudoun**Measure of success:** Continued online presence and local brand recognition.

Task	Timeframe	Who	Resources
Continue website hosting	ongoing	Nicole Acosta	

Initiative Name: Close the Gap Report**Measure of success:** Disseminate information regarding resources needed (public and private) to bring local human service nonprofits to scale, and to fill unmet community needs. Outcomes include: Loudoun County increases Nonprofit Grant funding; increased charitable giving rates in Loudoun County; increased funding from institutional funders to Loudoun-based nonprofits.

Task	Timeframe	Who	Resources
Publish and disseminate “Close the Gap” electronic report with nonprofit survey data	By January 2022	Amy Owen Carol Moore Nicole Acosta	
Host “In Your Community” donor event to share data for fund holders	January-February 2022	Amy Owen Carol Moore Nicole Acosta	
Develop community awareness campaign shared between Community Foundation and nonprofits (e.g. #closethegap – why is it important to close the gap for individual organizations)	April 2022 (after Give Choose)	Carol Moore Amy Owen Nicole Acosta	Seek offset funding

Initiative Name: Hunt Country Community Foundation Affiliate and Loudoun Community Foundation

Measure of success: Establish Hunt Country Community Foundation affiliate with Affiliate Board; creation of materials ad policies specific to HCCF

Task	Timeframe	Who	Resources
Board of Directors identifies priorities and direction; DBAs and URLs in place for future affiliate concept; draft logo designs (HuntCountryCF.org; Loudoun CF.org)	On hold during 2022	Board of Directors	
Map out name change timeline, sequence for both entities for 2021		Amy, Nicole, Carol HCCF Chair (to be identified)	Assists from Board member Janelle Brevard
Adopt policies required for affiliates, noting National Standards requirements		Amy, Board of Directors	
Legal Name Changes initiated for Lead Organization as Loudoun Community Foundation and DBA as Hunt Country Community Foundation		Amy	Legal and Board Legal assist
With full Board, clarify key messages, vision such as Local Leadership, Partnership, Legacy, with explicit Give Where You Live messaging		Amy, Nicole, Chair of HCCF (to be identified)	Assists from Janelle Brevard
Create Affiliate Board of at least five non-related individuals		Amy, Board of Directors, intended Chair of HCCF	
Create Affiliate Board meeting schedule to review policies, establish ambassador work, etc.		Amy, Nicole, Carol, Affiliate Board	
Brand Ads for Affiliate crafted with ad placements scheduled for Middelburg Life, Zest, Middleburg Eccentric, And LCF Loudoun Now, Loudoun Times Mirror			
New Signs prepped for LCF offices		staff	
Roll Out with News Releases and brand ads, personal messaging		all	

Goal 2

As a **GRANTMAKER**, the Community Foundation will grow community endowment and diversify its sources of funding, develop cost-effective business strategies, and make funding decisions that are aligned with our donors' wishes and in the best interest of the communities we serve.

Objectives:

- Empower philanthropic leaders and nurture emerging grantmakers to build the future of philanthropy.
- Support grantmaking processes that are guided, effective, and impactful.
- Engage our fund holders by ensuring they are well-informed about the performance of their respective funds, the impact of their grantmaking, and the needs of the charitable sector.
- Steward our endowment and funds through sound investment policies, adherence to U.S. National Standards for Community Foundations, and independent financial audits.
- Develop an annual fundraising strategy that seeks to engage donors and secure operating and program funding from individuals, government, corporations, and foundations.
- Conduct a community-wide giving program that raises awareness of the need in our community and invites everyone to support the causes of their choice.

Initiative Name: Forward Turn			
Measure of success: 8-12 youth will meet approximately 5 times to review grant applications from youth-led initiatives and make final grant recommendations. 90% of youth participants will report that participation in the program increased their knowledge, skills, and/or abilities in the area of grantmaking.			
Task	Timeframe	Who	Resources
Develop timeline for youth interaction, discussions of philanthropy for 2021-2022 cycle	Fall 2021	Amy Owen Nicole Acosta	
Release RFP for Forward Turn funds	October 2021	Nicole Acosta	
Student interviews and review of grant proposals received; awards made	April 2022	Nicole Acosta Amy Owen	
Develop timeline for youth interaction, discussions of philanthropy for 2022-2023 cycle	Fall 2022	Nicole and Amy	
Release and announce RFP for Forward Turn funds	October 2022	Carol Moore Nicole	

Initiative Name: Board Giving

Measure of success: 100% of Board members makes a meaningful gift to the Community Foundation, or meets the Board minimum giving threshold of \$1,000, in 2022.

Task	Timeframe	Who	Resources
Initial recruitment conversations include \$1,000 minimum give or get policy	Ongoing	Varies/staff/board	
Continue to expand to the diversity of the CF Board in skills, racial identity, and geography	Ongoing	Initial contact with Amy Owen, followed by Board Governance Committee	
Continue to expand list of future high-profile board members	Ongoing	Initial contact with Amy Owen, followed by Board Governance Committee	

Initiative Name: Friends of the Foundation

Measure of success: Increase Friends of the Foundation members (donors who give at least \$1,000 unrestricted) by five members in 2021 (for a total of 25 donors).

Task	Timeframe	Who	Resources
Identify 10-15 new prospects for personal approach	ongoing	board member connections	Underway
"Thank You Squad" Board members who call or write thank-you's	ongoing	Carol Moore Amy Owen	Underway
Showcase Friends in Annual Report	June 2022	Amy Owen Carol Moore	Underway
Conduct annual donor visit for members	Ongoing	Amy Owen	Underway
Develop a unique touch: letter, video, and/or email for donors who can't be reached by face to face visit	October 2022	Amy Owen Carol Moore	Staff time
Feature Friends in Community Investment e-newsletter	December 2022	Carol Moore	none

Initiative Name: Corporate Sponsorship

Measure of success: 1) Secure a minimum of \$60,000 in corporate sponsorships; 2) secure at least one new sponsor; 3) retain 90% of 2021 corporate sponsors.

Task	Timeframe	Who	Resources
Refresh design corporate sponsorship package document that features all CF programs and sponsor benefits	November 2021	Carol Moore	
Acknowledge support in e-newsletters, posters, annual reports	January 2022 update materials; ongoing throughout year	Amy Owen Carol Moore	

Initiative Name: Fundholders

Measure of success: Provide timely donor services to 88+ individual organizational fundholders

Task	Timeframe	Who	Resources
Maintain Foundant systems for Fund Holders' login	ongoing	Nicole Acosta	none
Deliver timely year end fund statements to Fund Holders	Update templates - February March 2022	Amy Owen Joe Scott	none
Notify Fund Holders of unfunded nonprofit needs	ongoing	Nicole Acosta	none
Send invitations to meet with each fund holder, one-on-one, for updates, to discuss charitable goals, and share community needs	March 2022 (at time of fund statements)	Amy Owen Nicole Acosta	none
Invite all Fund Holders to all events and CF programs	ongoing	Nicole Acosta Amy Owen Joe Scott	none
Invited Fund Holders, when appropriate, to support the CF's Friends of the Foundation program	ongoing	Amy Owen	none

Initiative Name: 1%-3% Admin Fees

Measure of success: Increase the number of new funds by 10 in 2020.

Task	Timeframe	Who	Resources
Continue to network, conduct donor research, and respond to donor referrals.	Ongoing	Amy Owen	
Include the Endowment for the Community in Give Choose	May 4, 2021	Amy	complete

Initiative Name: Foundation Funding

Measure of success: Secure \$300,000 in funding from foundations and competitive grant fund holders for programs and operations in 2021.

Task	Timeframe	Who	Resources
Apply for funds for CF programs and/or operations	ongoing	Amy	In house materials; underway
Encourage funding of Greater DC foundations into Loudoun County Charities	ongoing	Amy	In house materials; underway
Apply income or foundation income goals toward 2022 budget	ongoing	Amy	Underway

Initiative Name: Government Funding

Measure of success: Secure at least level or increased funding from FY 2023 grant program. Budgeted for 2022 = \$50,400.

Task	Timeframe	Who	Resources
Reapply for County of Loudoun Grant requesting to support and advance programs directly benefitting local nonprofits leadership and capacity	November 2021	Amy Owen Nicole Acosta	Staff time
Provide financial support services and contracts as needed for COVID, Human Services, or other projects	As needed	Amy Owen	Staff time

Initiative Name: Grants and Scholarships

Measure of success: Successfully distribute a minimum of \$1,500,000 within a minimum of 225 grants.

Task	Timeframe	Who	Resources
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Timely release of all RFPs, grant award, and final reports	ongoing	Nicole Acosta	
Timely announcement of scholarships and grants include a news release, website updates, etc.	ongoing	Nicole Acosta Carol Moore	
Update LCPS of scholarship guidelines and timeline (scholarship applications to use Foundant portal)	January 2022	Amy Owen	
Continue to apply best practices, due diligence, and required policies as established by the Council on Foundations and National Standards for CFs for all awards	ongoing	Nicole Acosta Amy Owen Pam Ray	
Continue implementation of online grant application portal for grantees and reviewers using Foundant	ongoing	Nicole Acosta	

Initiative Name: Giving Circles			
Measure of success: Each giving circle raises funding to make grants annually.			
Task	Timeframe	Who	Resources
Seek a strong leader for each giving circle to reach out to prospective donors and steward processes	Ongoing	Nicole Acosta Carol Moore	Additional resources must be borne by the giving circle
Provide supervision, guidance and administrative support, to contract staff supporting giving circles	Ongoing	Amy Owen Nicole Acosta Carol Moore	

Initiative Name: Give Choose			
Measure of success: Maintain giving from 2022 (\$1,000,000)			
Task	Timeframe	Who	Resources
Launch nonprofit registration for participation	December 2021	Nicole Acosta	
Prize Pool of at least \$30,000 is established to incentivize giving, as part of CF budget process	December 2021	Amy Owen	

Identify marketing partners	December 2021	Amy Owen Carol Moore Nicole Acosta	
Participant training is offered (include topic: video, email, social media, direct mail/postcard)	February 2022	Nicole Acosta Carol Moore	
Review collateral and advertising	January 2022	Amy Owen Carol Moore Nicole Acosta Marketing partner	
Work with local (Middleburg, Purcellville, Leesburg) papers increase exposure	February – March 2022	Amy Owen Carol Moore Marketing partner	
Include the Endowment for the Community in Give Choose	March 2022	Amy	
Draft communications plan unique to the event	March 2022	Carol Moore Amy Owen Nicole Acosta Marketing partner	
Sponsor online notices created for event	March 2022	Amy Owen Carol Moore Nicole Acosta	
Implement and execute Give Choose event	March 29, 2022 (Early Giving = March 15)	Amy Owen Carol Moore Nicole Acosta	
Post event Thank-You to Community (email, letter to the editor, ad)	March 2022	Amy Owen Carol Moore Nicole Acosta	
Integrate all donors into Foundant software	May-June 2022	Joe Scott Nicole Acosta	
Host a Follow-Up Training and Debrief	April 2022	Nicole Acosta Carol Moore	

Initiative Name: Foundation Directory Online

Measure of success: 15 nonprofit grant seekers will receive personalized training and access to Candid’s Foundation Directory Online database. 80% of participants will report that the assistance they received help them learn more about foundation funding sources.

Task	Timeframe	Who	Resources
Maintain FIN and FDO contract with Candid	January 2022	Amy Owen	
Send reminder emails to nonprofits about program offering	quarterly	Carol Moore Sapna Hencinski	
Provide individualized training and access to nonprofits seeking services	ongoing	Sapna Hencinski	
Include FDO portion of Learning Lab Grants 101 workshop	August 2022	Amy Owen Nicole Acosta Sapna Hencinski	Secure offset funding

Goal 3

The Community Foundation will invest in **PARTNERSHIPS** for a better community through education, collaboration, and communication.

Objectives:

- Build strategic relationships with individuals, nonprofits, businesses, and government agencies in support of our mission.
- Support local initiatives that connect donors, nonprofits, businesses, government agencies to benefit our community.
- Promote and advance the spirit and dedication of volunteerism in our community.
- Pay tribute to donors and nonprofits, celebrate the accomplishments of the Community Foundation, and engage the public to grow philanthropy.

Initiative Name: Board Development and Knowledge

Measure of success: 1) 100% of new Board members complete orientation; 2) 100% of Board members participate in Board training and self-assessment.

Task	Timeframe	Who	Resources
Each meeting includes discussions of partnerships, grantmaking due diligence, and CF systems	Ongoing	Governance Committee leadership	Underway

Pursue CF Board training, Online Express, for viewing at each meeting	Ongoing	Amy Owen Governance Committee leadership	
Pursue READI training for board and staff annually	Ongoing	Amy Owen READI Committee	
Regular review of progress implementing strategies in newly adopted 2019-2023 strategic plan	Ongoing	ALL	
Continue new Board Orientation program as Board members join (staff led)	Ongoing	Amy Owen Nicole Acosta Carol Moore Joe Scott	
Support Board-led orientation for new members	Ongoing	Amy Owen Governance Committee	
Undertake annual Board self-assessment	May 2022	Amy Owen	
Provide care and feeding of CF Committees: a. Executive c. Investment d. Finance e. Grants f. Governance h. READI	ongoing	Amy Owen Nicole Acosta Carol Moore	

Initiative Name: Operational Systems

Measure of success: Maintained status as accredited by the National Standards for Community Foundations. Apply best practices for community foundations and nonprofits.

Task	Timeframe	Who	Resources
Prepare for annual audit	Ongoing	Joe Scott Amy Owen Nicole Acosta Joan Molchan	
Review salary structure and staff benefits	Ongoing	Amy Owen	
Annual staff and contractor reviews	Ongoing	Amy Owen Nicole Acosta	

Prepare financial statements for each Board meeting	ongoing	Joe Scott Joan Molchan	
Prepare, respond to, and manage unique requests from various fund holders related to financial reporting, expenditures, and other services as needed	ongoing	Joe Scott	
Maintain accreditation for National Standards for Community Foundation	ongoing	Amy Owen	

Initiative Name: Facility Management and Claude Moore Nonprofit Training Center

Measure of success: Implementation of policies and procedures for the use of the Claude Moore Nonprofit Training Center (CMNTC) and the maintenance of 714 East Market Street.

Task	Timeframe	Who	Resources
Develop systems to ensure facility is adequately supplied and maintained	Ongoing	Joe Scott Amy Owen Nicole Acosta	
Maintain policies and procedures for nonprofit use of CMNTC	Ongoing	Joe Scott Amy Owen Nicole Acosta	
Refresh room booking system for NP programs, trainings and events in CMNTC, once pandemic ceases	When needed	Joe Scott Amy Owen Nicole Acosta	Allocated

Initiative Name: President's Council

Measure of success: To convene as a group annually or one-on-one to serve as a "brain trust" and advise the Community Foundation on issues they perceive to be key and solutions within reach

Task	Timeframe	Who	Resources
Maintain newly formed group of up to three folks	ongoing	Amy Owen	
Encourage each to join as a Friend of the Foundation	Ongoing/fall 2022	Amy Owen	

Initiative Name: Professional Advisors

Measure of success: Two referrals annually from a wealth manager, attorney, banker or insurance representative

Task	Timeframe	Who	Resources
Continue one on one relationship development	ongoing	Amy	
Use ad schedule to thank professional advisors	October 2022	Amy	
Continue work with Loudoun Estate Planning Council	ongoing	Amy	
Host an annual presentation (online) for professional advisors	October 2022	Amy	

Initiative Name: Donor/Fund Holder Programs

Measure of success: To host annually one or more personal programs specifically designed for current major donors and Fund Holders

Task	Task	Task	Task
Encourage all to join as a Friend of the Foundation	Ongoing/Fall 2021	Amy	
Identify a unique tour or presentation program offering for Donor/Fund Holders	June 2021	Amy Owen	
Use Foundant Opportunities to cultivate donor engagement	Ongoing	Amy Owen Carol Moore Pam Maroulis	

Initiative Name: Partnership Relationships

Measure of success: Active participation and leadership in local coalitions and associations supporting nonprofits, philanthropy, and grantmaking.

Task	Timeframe	Who	Resources
Support leadership efforts with current partners: a. WRAG b. Chamber Board c. Chamber DEI Committee d. Loudoun Estate Planning Council	Ongoing	Amy Owen Nicole Acosta Carol Moore	Underway

e. Virginia Funder's Network f. Loudoun Community Cabinet h. Loudoun Human Services Network			
ii. Attend coalition meetings of: a. Loudoun Human Services Network b. Continuum of Care c. Chamber Policy Committee d. Chamber Nonprofit Initiative e. Civic Action Working Group	Ongoing	Amy Owen Nicole Acosta Carol Moore	Underway

Initiative Name: Collateral Brochures and Outreach			
Measure of success: Organizational collateral, publications, and announcements created and disseminated in a timely manner.			
Task	Timeframe	Who	Resources
Finalize Annual Communications Plan	January 2022	Carol Moore Amy Owen Nicole Acosta	
Annual Report	Publish by June 2022	Carol Moore Amy Owen Nicole Acosta Joe Scott	
Community Investors e-newsletter	Monthly	Carol Moore	Budgeted
Thank new fund holders via media and ads	Ongoing	Amy Owen Carol Moore	Budgeted
RFP announcements for all competitive grants and programs Website/social media posts and updates	ongoing	Nicole Acosta Carol Moore	Budgeted
Special events programs like Give Choose and Philanthropy Summit	ongoing	Carol Moore Amy Owen Nicole Acosta	Budgeted
Publish news releases around new funds, grants availability, blog posts, and special events.	ongoing	Carol Moore	Budgeted

Update display items with new mission statement and sponsors	As needed once Covid restrictions lift	Carol Moore	
Maintain and expand social media presence: Facebook Instagram LinkedIn YouTube/video	Ongoing	Carol Moore	