



Charitable Ventures 5 Year Strategic Framework

Vision Statement

Our vision is empowered communities where all stakeholders work together to solve critical social challenges through strategically coordinated efforts and resources.

Vision Tagline

Empowered Communities, Working Together, Solving Critical Social Challenges

Mission Statement

Charitable Ventures works with ALL stakeholders to strengthen communities and address critical social issues by:

- Supporting collaborative regional efforts
- Incubating new ideas and supporting community projects
- Providing practical and innovative consulting to nonprofits and foundations

2021 -2026 Strategic Framework

Services: Charitable Ventures will continue its work to address critical social issues. To accomplish this, to assure sustainable revenue, and to promote impact and regional reputation, our leadership will focus on:

- Growing the consulting business to serve more nonprofit organizations
- Responding to opportunities to engage in more collective impact initiatives
- Expanding the incubation platform to new projects

Markets served: Our primary markets include nonprofits and philanthropic institutions. Our emerging markets include serving government entities and businesses, in their efforts to serve their communities and address critical social issues. Our geographic focus is Orange County, and the broader southern California region local nonprofits may serve. Leadership will work to expand our services to current and emerging markets, and to align to and partner with like-minded organizations seeking social change, without redundancy.

Branding/marketing: A branding/marketing strategy will be developed to recognize the different markets served (nonprofits, foundations, businesses, government agencies), to increase outreach in marketing the resource-generating consulting business, and to elevate CV as a regional thought leader thus increasing brand awareness of the organization itself.

Financial management: CV will be financially sustainable and sound by making decisions and community investments based on both the impact and the margins generated by each line of business and project.

Fund Development: Fundraising will be an important component of our business plan, both as a means to generate revenue, and also to deepen philanthropic relationships and engagement in the mission.

Succession Planning: CV will place a priority on developing and implementing a succession plan to assure long-term leadership continuity.

Board Development: The board of directors will consist of nine committed individuals representing our diverse community with broad skill sets to complement staff expertise.

Equity, Diversity and Inclusion: Charitable Ventures will deepen its commitment to Equity, Diversity and Inclusion by first exploring how these values are manifested in our internal culture, policies and procedures; and then exploring how these values are perceived and experienced by our projects, clients, partners and communities who work with us.