



THE COMMUNITY
FOUNDATION
FOR NORTHEAST FLORIDA

Giving Back. Giving Forward.

STRATEGIC PLAN 2021-2025

Treaty Oak in
Jacksonville's Jessie
Ball duPont Park

Grow Assets **Dedicated** to
Our Northeast Florida Region

Provide a **Robust** Philanthropic
Leadership Portfolio

Build **Greater** Awareness
and Understanding

Strengthen Communities Through
The **Effective** Use of All Forms of Capital

Ensure the Foundation is **Strong** and **Resilient**

LETTER FROM THE PRESIDENT & CHAIR

February 2022

Over the past 2½ years, the Board of Trustees and staff of The Community Foundation for Northeast Florida have been engaged in deep reflection about our work, our role in the community, the investments we are making in local efforts, and our ability to help donors achieve the most meaningful results for their gifts. The pandemic made this process challenging, but frankly, it also sharpened our focus on getting this right.

To inform our deliberations, we commissioned a survey of our donors, conducted community interviews with grantees and professional advisors, and performed a cost study of our operations. During this time, we also began our listening journey to examine ways we could advance diversity, equity and inclusion, both internally and in our community.

Now, as we begin our 58th year of service to Northeast Florida, we want to share our strategic framework and invite the community to join us in fulfilling our goals.

We recognize that the complex issues facing our community will require greater resources, and we will intensify our pursuit of new assets, especially permanent ones. We will engage our fundholders in new and different ways to invest in our community, beyond traditional grantmaking. We will explore new partnerships with other funders and community stakeholders to bring collaborative approaches to persistent issues. We will continue to be a staunch advocate, convener and connector in support of local nonprofit organizations. We will further diversify our Board and staff, and use an equity lens in all facets of the Foundation's operations. And by concentrating all our forms of capital on civic leadership, we can and will play a more visible role in advocating for systemic change.

The mission of The Community Foundation remains the same: Stimulating Philanthropy to Build a Better Community. It is the balance of that equation that drives us. Our re-envisioned strategic framework calls on us to use our power as one of the community's philanthropic anchor institutions to be a greater force for good going forward, and to have the organizational strength to do that in perpetuity. Our pledge is a bolder, more focused emphasis on strategic philanthropy that improves the lives of everyone in our community.



A handwritten signature in black ink, appearing to read "Nina M. Waters".

Nina M. Waters
President



A handwritten signature in black ink, appearing to read "Brian J. Davis".

The Honorable Brian J. Davis
Chair of the Board of Trustees

Stimulating Philanthropy To Build A Better Community

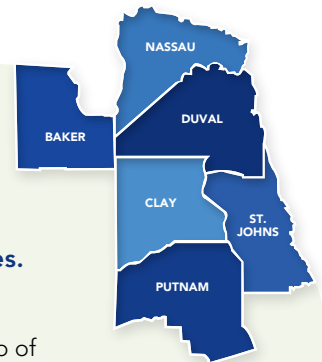


A mural outside the **Center for Sustainable Agriculture Excellence & Conservation (CSAEC)** in East Palatka—a nonprofit facility feeding the hungry, and TCF grant recipient.



1: Grow Assets **Dedicated** to Our Northeast Florida Region

The important work of building our community starts with the generous gifts by donors to establish or increase funds at the Foundation. Our focus is on Duval, Nassau, St. Johns, Putnam, Baker & Clay counties.



WE WILL BUILD ON:

- A robust portfolio of 'give now' and 'give later' products and services to meet donors' charitable and financial objectives
- The highest level of donor stewardship as evidenced by the 2019 Center for Effective Philanthropy's survey
- Our collaborative work with the region's financial advisors, trust & estate and elder law attorneys, and CPAs to advance the philanthropic and financial goals of their clients

WHAT IS NEW:

- Focus on diversifying our professional advisor relationships by age, geography and ethnicity
- Emphasize educating fundholders about opportunities to create permanent assets at the Foundation
- Explore new ways for donors to participate in civic leadership initiatives
- Introduce a Local Capital Pool to expand investing opportunities

STRATEGIC
PRIORITIES FOR
2021-2025



THE COMMUNITY
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2: Provide a Robust Philanthropic Leadership Portfolio



As a trusted community partner, we are involved in a variety of philanthropic endeavors that educate and unite various collaborators within the region on many different topics. By traveling with donors along their philanthropic journey, we can deepen their connection to their charitable giving and the Foundation's work.

WE WILL BUILD ON:

- A successful track record of assisting fundholders with meaningful local knowledge about specific nonprofit organizations in the region and the sector as a whole
- Established collective giving opportunities that allow like-minded donors to engage in strategic, collaborative philanthropy:



- Targeted efforts to educate and involve fundholders' families in their philanthropy
- A nearly 25-year history of engaging next generation, emerging philanthropists:
- The provision of information to fellow grantmakers and initiative-focused fundholders about pressing community concerns:



WHAT IS NEW:

- Emphasize attracting donors who are diverse by race, ethnicity, age, geography and newness to our community
- Offer new opportunities for donors to utilize 'impact investing' – community philanthropy that goes beyond traditional grantmaking (Program-related investments, TCF Local Capital Pool)
- Connect interested donors with mutual interests to each other and to The Community Foundation's Civic Leadership efforts

Below: TCF underwrote free visits on Martin Luther King's birthday to the **Comer Museum of Art & Gardens**.



Right: TCF offices in downtown Jacksonville



2020
TCF staff
members



3: Build Greater Awareness and Understanding

The Foundation's organizational brand is fiercely protected and actively advanced to underscore our role as a philanthropic anchor organization in our community. This 'Good Housekeeping Seal of Approval' is crucial to attracting resources and enabling the collaborative solutions that we desire.

WE WILL BUILD ON:

- Our leadership role(s) in strategic community partnerships
- The use of earned, owned and paid media to spotlight current impact and share fundholder experiences
- The legacy of highly satisfactory donor experiences in the wider community

WHAT IS NEW:

- Prioritize opportunities to champion equity, using the Foundation's internal and external sources to remove barriers and promote inclusion
- Advocate for key issues in support of our Civic Leadership goals
- Emphasize storytelling to amplify donor/grantee efforts that respond to challenges and opportunities in our community

4: Strengthen Communities Through The Effective Use of All Forms of Capital



The Community Foundation has spent more than five decades building its financial capital, as well as its social, intellectual, moral and reputational capital. Deploying all our forms of capital to make meaningful change is the 'dividend' of being a philanthropic anchor organization in our community.

WE WILL BUILD ON:

- A professional, rigorous approach to grantmaking, executed in a fair and equitable way
- Our multi-year focus on Supporting Struggling Neighborhoods as a key leadership strategy
- Support for donors who want to be increasingly engaged in the most pressing needs in our community, including collective impact, collective giving and emergency funding
- Exposure of fundholders to broad community issues and funding opportunities

WHAT IS NEW:

- Expand investments, including local capital investments, that are designed to prioritize impact beyond traditional grantmaking
- Emphasize leveraging funds from outside sources to advance our strategic focus
- Identify community indicators to better inform our grantmaking
- Focus on equity in grants and community investments
- Use our intellectual, moral and reputational capital to support a non-partisan, public policy agenda that aligns with issues in which the Foundation has made a significant investment



5: Ensure the Foundation is Strong and Resilient

The Community Foundation's commitment to actively work for the region's improvement in perpetuity depends on the effective preservation, security and growth of assets, both financial and human.

WE WILL BUILD ON:

- A highly experienced, professional and dedicated staff
- A robust investment program, guided by a knowledgeable investment committee and outside investment advisors
- Infrastructure that supports the function of a \$600+ million organization
- Demonstrated capacity to achieve the mission through strong governance, management, and a resilient operating model

WHAT IS NEW:

- Focus on increasingly diverse Staff and Board
- Add a Vice President for Civic Leadership to increase staff capacity and to lead strategic community engagement and public policy efforts (2022)
- Add an Information Services Manager (2021)
- Renew our emphasis on growing the Operating Endowment
- Advance our technology to support best-in-class stakeholders' experiences, leading data strategies and enterprise management, including an improved donor portal and better reporting capabilities

Above: Beautiful mosaics on the Vilano Beach Nature Boardwalk, created by students from the Florida School for the Deaf and Blind.

The **Community Foundation for Northeast Florida** is a nonprofit, 501c3 organization that helps donors invest their philanthropic gifts wisely, helps nonprofits serve the region effectively, and helps people come together to make our community a better place. Created in 1964, we are Florida's oldest and largest community foundation, with assets of more than \$625 million at the end of 2021 and nearly \$640 million in grants made since inception.

OUR MISSION:

Stimulating Philanthropy To Build A Better Community

OUR VALUES:

Grantmaking that is **fair** and **thoughtful**;
Leadership that **trusts** and **respects** the intent of donors;
Service to community that is **innovative** and **creative**;
Governance with **integrity** that puts community above self;
Equity centered as a core strategy of the Foundation.

WE DO THIS THROUGH:



OUR SUCCESS IS MEASURED BY:

- 1: Increased philanthropy** in the region
- 2: Successful outcomes** from our grantmaking
- 3: A vibrant nonprofit sector** supported by our collaboration with others
- 4: A strong and stable** Community Foundation that will survive in perpetuity

Discover how we can work with you or your advisor to power your charitable vision by Giving Forward. Contact us at (904) 356-4483 or jaxcf.org.



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