



## **Strategic Plan -- 2011 through 2014**

### **Vision Statement**

***To be the trusted philanthropic leader in the positive transformation of the Central San Joaquin Valley.***

### **Mission Statement**

***The mission of the Fresno Regional Foundation is to improve the quality of life in the Central San Joaquin Valley through philanthropy.***

### **Values**

***In all its work, the board and staff of the Fresno Regional Foundation seek to exemplify:***

***Integrity***

***Inclusion***

***Excellence***

***Stewardship***

***Visionary Leadership***

**Goal #1 - Asset Development: Grow assets to a level commensurate with the community's maximum philanthropic capacity to meet the community's needs.**

Objective One: Grow assets from \$46 million to \$90 million.

~~Strategy 1: Add an asset development staff position.~~

~~Strategy 2: Implement strategic and targeted approaches for the cultivation and development of donors.~~

~~Strategy 3: Further develop relationships with professional advisors.~~

~~Strategy 4: Implement and actively promote an FRF Legacy Society.~~

~~Strategy 5: Obtain license for CGAs and conduct research for implementation of a CGA program.~~

Objective Two: Monitor the FRF portfolio of funds to insure balance emphasizing endowed funds, unrestricted funds, field of interest funds, and the administrative endowment fund.

Objective Three: Expand FRF's donor base to all counties FRF represents while seeking geographic and ethnic diversity.

**Goal #2 - Governance: Fully engage FRF Board to individually and collectively demonstrate a passion for philanthropy, understand the modern concept of a community foundation, and share responsibility for FRF's future.**

Objective One: Maintain high levels of oversight encompassing the fiduciary responsibilities, strategic planning, and visionary thinking.

Objective Two: Board members become actively involved in donor cultivation and in maintenance of existing donor relationships.

Objective Three: Develop the Board's understanding of the strategic and visionary roles played by high functioning boards and expand capacity in these areas.

Objective Four: Strengthen the working relationship between Board Members and FRF Staff Members.

**Goal #3 – Marketing, Communications and Visibility: Increase awareness and engagement of key audiences to achieve targeted asset growth.**

Objective One: Maintain effective communications with our three core audiences – existing donors, professional advisors, and HNW prospective donors.

Objective Two: Strengthen communications toolkit to support audience engagement.

Objective Three: Evaluate the appropriateness of building a brand and brand awareness.

Objective Four: Strategically enhance our communications capacity.

**Goal #4 – Grantmaking and Community Leadership: Build on FRF’s strong competitive grantmaking program to add and demonstrate value to area charitable organizations.**

Objective One: Continue the excellent grantmaking processes established in FRF’s 2008 strategic plan.

Objective Two: Fulfill our obligation for community leadership.