

Becoming a

# Community Catalyst

## 2024-2028 STRATEGIC PLAN

Adopted by the Board of Directors on December 13, 2023



Cobb Community Foundation began as a local fund of the Community Foundation for Greater Atlanta in 1993 and became our own 501(c)(3) in 2005. Over these 30 years, we've supported the ever-changing needs across Cobb County through inspiring charitable giving, building resources for the future, and connecting donors who care with causes that matter.

With nearly \$30 million in assets, a large well-connected board, and a talented six-person staff, we're embarking on a new phase of growth of community impact.

Our **2023-2027 Strategic Plan** outlines how we will solidify our role as a **community catalyst**, sparking meaningful improvements to quality of life in and around Cobb through mobilizing people, ideas, and resources. While the plan prioritizes our work over the next five years, it is built on a vision for the next decade.

**We will solidify our role as a community catalyst—  
mobilizing people, ideas, and resources for the benefit of all.**

## Strategic Planning Committee

---

### Board Representatives

Chris Gruehn, Committee Chair  
Bob Bonstein  
Kim Gresh  
Joyette Holmes  
Donna Krueger  
Jim Rhoden  
Trey Sanders  
Larry Stevens

### Staff

Shari Martin, President & CEO  
Elena Bowman  
Alexandra Boyle  
Nakeia Gray-Smith  
Mary Koronkowski  
Shelly Owens



# Methodology

Over a six-month period, we embarked on a comprehensive planning process to assess our strengths and our opportunities, and to create a plan of action for the future of CCF.

We formed a Board-led **Strategic Planning Steering Committee** to oversee the process.

We partnered with BowerComm, a community foundation strategic planning consultant, to articulate our purpose, 10-year vision, strategic themes, strategies, and metrics. This included:

- **Surveying our board and staff** to assess our capabilities and capacity
- **Interviewing 14 and surveying 163** philanthropists, public and civic leaders, grantees, partners, leadership, and staff to gather perspectives to inform this work
- **Analyzing peer strategic plans** to identify opportunities and best practices
- **Meeting as a full board for a workshop** to identify key themes, shape goals, and brainstorm possible strategies
- **Meeting regularly as a strategic planning committee** to refine strategic themes and establish metrics
- **Developing initiatives and milestones** to meet our end goal: making life better for all who call our area home



# Our Guiding Principles

We refreshed our core aspirations to reflect our evolving role and address the needs of our growing community.

## OUR MISSION

**Be a catalyst for a thriving community—** mobilizing people, ideas, and resources to improve quality of life in and around Cobb.

## OUR VISION FOR THE COMMUNITY

**A thriving community of engaged, charitable citizens—**where all people can access opportunities and achieve their greatest potential.

## OUR VALUES

### Steward with Integrity

We are entrusted with financial resources and charitable wishes of our donors and fundholders, and hold ourselves accountable to be ethical, honest, and transparent in our actions.

### Commit to Excellence

We strive to provide the highest quality and value in everything we do.

### Lead with Compassion

We take action because we care deeply for our community and those we serve.

### Give with Purpose

We leverage data to enhance our understanding of the needs of our community and mobilize resources to meet those needs.

### Embrace Diversity

We embrace diversity, stand for equity, and encourage inclusion through our practices and daily interactions within our organization, community, and partnerships.

### Foster Collaboration

We work collaboratively with community stakeholders, empower others to build lasting partnerships, and embrace our shared responsibility to work toward productive solutions to strengthen our community.

### Adapt to Change

We are committed to evolve and grow to serve the changing needs of our community.



# Our Approach

## We will shift emphasis from “charitable bank” to “community catalyst”

For a foundation our size, we’re starting our next decade from a position of strength. That’s why we’re setting aspirational goals for ourselves—so we can propel Greater Cobb forward at an accelerated pace.

For the past five years, we’ve focused heavily on growing donor relationships and generating assets through donor advised funds and agency funds. However, most of these assets are donor- or agency-controlled, which means we’re missing an opportunity to harness the power of collective giving and grow strategic grantmaking. At the heart of our plan is the desire to be more than a charitable bank; we want to be a catalyst for change and an amplifier of impact.

We envision powerful growth in long-term community funds, so we can empower community problem solving and improve capacity of our local nonprofits and agencies to create greater impact.

STRATEGIC THEMES	Collective Giving by an Engaged Community	Community Problem Solving	Expanded Non-Profit/ Agency Capacity	CCF Organizational Effectiveness
10-YEAR STRATEGIC RESULTS	<i>\$100 million foundation with powerful long-term community funds</i>	<i>Improved Cobb “Vital Signs”</i>	<i>More effective nonprofits/agencies driving impact in Cobb</i>	<i>Engaged, efficient and effective CCF</i>
KEY STRATEGIES	<ul style="list-style-type: none"> <li>• Reposition CCF primarily as a community problem solver</li> <li>• Focus on major gifts and estate gifts</li> <li>• Aggressively generate long-term unrestricted FOI community funds</li> <li>• Increase proportion of long-term funds at CCF</li> <li>• Engage Cobb residents to give their time, talent, and treasure to benefit the community</li> </ul>	<ul style="list-style-type: none"> <li>• Coordinate inter-agency effort to define, prioritize and develop common language and measurements around community needs</li> <li>• Drive community awareness of top issues</li> <li>• Coordinate efforts to align Cobb resources to address those needs</li> <li>• Orchestrate collaboration around policy, systems, and environment changes to improve scores, address needs</li> </ul>	<ul style="list-style-type: none"> <li>• Empower improvements in leadership, governance, and financial sustainability among key Cobb non profits and agencies</li> <li>• Encourage creation of long-term agency funds</li> <li>• Target strategic grantmaking aligned with community needs</li> </ul>	<ul style="list-style-type: none"> <li>• Build operations reserve fund</li> <li>• Empower a talented and effective team</li> <li>• Improve board engagement and effectiveness</li> <li>• Maintain impeccable financial management, regulatory compliance</li> <li>• Continually upgrade infrastructure and technology for efficiency and effectiveness</li> </ul>
<b>SPECIFIC AND TARGETED COMMUNICATIONS</b>				



# COLLECTIVE GIVING

## STRATEGIC RESULT

***\$100 million foundation with powerful long-term community funds***

KEY STRATEGIES	5-YEAR TARGETS
Reposition CCF primarily as a community problem solver	<ul style="list-style-type: none"> <li>50% brand awareness among key audiences</li> </ul>
Aggressively generate long-term unrestricted and FOI community funds	<ul style="list-style-type: none"> <li>\$5M long-term unrestricted and FOI community funds</li> <li>150 corporate champions</li> <li>\$1M annual fundraising (including corporate champion commitment)</li> </ul>
Aggressively generate estate gifts	<ul style="list-style-type: none"> <li>\$5M estate commitments</li> <li>35 advisors referring</li> </ul>
Increase proportion of long-term funds at CCF	<ul style="list-style-type: none"> <li>40% assets are long-term</li> </ul>
Engage Cobb residents to give their time, talent, and treasure to benefit the community	<ul style="list-style-type: none"> <li>500 total charitable funds</li> <li>Surveys show community philanthropy has increased</li> <li>Giving programs defined and on target</li> </ul>

## KEY INITIATIVES AND MILESTONES

	2024	2025	2026	2027	2028
NEW	<b>Brand Update</b> Refreshed message	<b>Major Gifts Campaign Prep</b>	<b>Major Gifts Campaign</b>  <b>Consider Monthly Small Gifts Campaign (Give 365)</b>		
	<b>Donor Development "Engine"</b> Plan, build, and implement a sophisticated, targeted marketing engine to drive engagement throughout donor lifecycle (small gifts, DAFs, estate). Focus on legacy giving, private foundations, and driving Qualified Charitable Distributions.				
	<b>Legacy Giving Program</b> Focused outreach to generate estate gifts; steer them toward unrestricted giving.				
	<b>Fee Structure and Fund Agreement Revamp</b>	<ul style="list-style-type: none"> <li>Revisit fee agreements to remove language around "fees" with shift to "community contribution" or similar</li> <li>Update DAF agreements to encourage balances to unrestricted community fund</li> </ul>			
CONTINUE	<b>Professional Advisor Network</b> Expand and build stronger relationships with CPAs and attorneys, in particular, to generate referrals				
	<b>Corporate Champions Program</b> Solidify Corporate Champion Roundtable; grow number of Champions; increase percentage directed to unrestricted fund				
	<b>Fundholder Engagement</b> Begin testing different types of events/gatherings for stakeholder engagement				
	<b>Nonprofit Fundraising Campaign</b> Continue Gift Guide or other campaign to generate donations and visibility for agencies and causes				



# COMMUNITY PROBLEM SOLVING

## STRATEGIC RESULT

### *Improved Cobb “Vital Signs”*

KEY STRATEGIES	5-YEAR TARGETS
Coordinate inter-agency effort to prioritize community needs	<ul style="list-style-type: none"> <li>Vital signs defined and prioritized</li> </ul>
Drive community awareness of top issues and progress	<ul style="list-style-type: none"> <li>50%+awareness among key audiences</li> </ul>
Coordinate efforts to align Cobb resources to address those needs	<ul style="list-style-type: none"> <li>Funding pipeline established for key efforts, and significant resources directed to identified needs</li> </ul>
Orchestrate collaboration around policy, systems, and environment changes to improve scores, address needs	<ul style="list-style-type: none"> <li>Improvements demonstrated in community collaboration</li> <li>Improvements to stated targets achieved</li> </ul>

## KEY INITIATIVES AND MILESTONES

	2024	2025	2026	2027	2028
<b><i>Vital Signs Initiative</i></b>					
<b>NEW</b>	<b>Convene and Plan</b> <ul style="list-style-type: none"> <li>Recruit partners</li> <li>Engage provider</li> <li>Develop criteria &amp; methodology for assessment to be done in 2025</li> <li>Consider need for initiative leader</li> </ul>	<b>Community Assessment</b> Undertake assessment and facilitate prioritization of issues	<b>Marshal Resources</b> Identify, generate, and deploy resources (through strategic grant-making) for priority efforts		<b>Community Assessment</b> Undertake assessment and facilitate prioritization of issues
			<b>Issue Awareness and Reporting</b> Educate stakeholders and community on priority issues, action plans, and progress		
			<b>Collaboration: Policy, Systems &amp; Environment</b> Orchestrate collaboration to address systemic changes required for progress		



# EXPANDED NON-PROFIT/ AGENCY CAPACITY

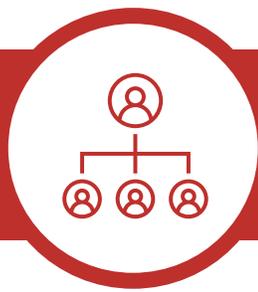
## STRATEGIC RESULT

### *More effective nonprofits/agencies driving impact in Cobb*

KEY STRATEGIES	5-YEAR TARGETS
<b>Empower improvements in leadership, governance, and financial sustainability among key Cobb non-profits and agencies</b>	<ul style="list-style-type: none"> <li>Achieve expected increases in capacity (OCAT, have strategic plans, board composition)</li> </ul>
<b>Encourage creation of long-term agency funds</b>	<ul style="list-style-type: none"> <li>Increase in number and size of long-term agency funds</li> </ul>
<b>Target strategic grantmaking aligned with community needs</b>	<ul style="list-style-type: none"> <li>\$2 million granted annually (in conjunction with community problem solving initiatives)</li> </ul>

## KEY INITIATIVES AND MILESTONES

	2024	2025	2026	2027	2028									
CONTINUE	<b>Certified Nonprofit Professionals Program (or an alternative)</b> Continue to fund and grow participation in this program													
	<b>Strategic Initiative Grants</b> Until new priorities are defined through Vital Signs, continue strategic grants for community resource centers and childcare/early learning													
	<b>Nonprofit Fundraising Empowerment</b> Continue "gift guide" or other initiative to bring attention to nonprofit needs and incent funding													
NEW	<b>Nonprofit Roundtable (PILOT)</b> Quarterly sessions with senior leadership from larger nonprofits that leverage CCF's convening power to create opportunities only CCF could create													
	<table border="1"> <tr> <td colspan="2"><b>Nonprofit Board Engagement</b> Engage nonprofit boards in creating/growing agency funds</td> <td colspan="3"></td> </tr> <tr> <td></td> <td colspan="4"><b>Vital Signs Grants</b> Strategic grantmaking to nonprofits instrumental in meeting identified vital signs efforts</td> </tr> </table>					<b>Nonprofit Board Engagement</b> Engage nonprofit boards in creating/growing agency funds						<b>Vital Signs Grants</b> Strategic grantmaking to nonprofits instrumental in meeting identified vital signs efforts		
<b>Nonprofit Board Engagement</b> Engage nonprofit boards in creating/growing agency funds														
	<b>Vital Signs Grants</b> Strategic grantmaking to nonprofits instrumental in meeting identified vital signs efforts													



# CCF ORGANIZATIONAL EFFECTIVENESS

## STRATEGIC RESULT

### *Engaged, efficient and effective CCF*

KEY STRATEGIES	5-YEAR TARGETS
Build operations reserve fund	<ul style="list-style-type: none"> <li>\$1 million ops fund</li> </ul>
Empower a talented and effective team	<ul style="list-style-type: none"> <li>OCAT rating 3.5+ in talent-related measures</li> </ul>
Improve board engagement and effectiveness	<ul style="list-style-type: none"> <li>Board 100% donors and 75%+ attendance</li> <li>OCAT rating 3.5+ in governance-related measures</li> </ul>
Maintain impeccable financial management, regulatory compliance	<ul style="list-style-type: none"> <li>Obtain CF National Standards designation</li> <li>OCAT rating 3.5+ in finance- and compliance-related measures</li> </ul>
Continually upgrade infrastructure and technology for efficiency and effectiveness	<ul style="list-style-type: none"> <li>OCAT rating 3.5+ in technology and operations measures</li> </ul>

## KEY INITIATIVES AND MILESTONES

	2024	2025	2026	2027	2028
NEW	Foundant C-Suite* Implementation	Operations Endowment Fundraising Campaign (Potentially combined with unrestricted major gifts campaign)			
	Board Onboarding and Ambassador Implementation	Strategic Plan Mid-Cycle Update		2029-2033 Strategic Plan Development	
	HR Policies & Procedures Formalization / Handbook				
	Professional Development & Cross-Training Plan and Implementation				
	Retirement Plan Implementation	National Standards Certification			

\*Pending final discussions with key Foundant users

# 2024-2028 Roadmap

## Our Initiatives and Milestones

**2024**

- Implement financial technology, HR policies/procedures, and fund/fee agreement revamp
- Continued engagement of professional advisors, corporate champions, fundholders
- Vital Signs convening and planning
- Continue Certified Nonprofit Professionals Program (or similar), strategic initiative grants, and nonprofit fundraising empowerment

**2025**

- Vital Signs community assessment
- Deploy legacy giving program
- Engage nonprofit boards in fundraising
- Launch operations fundraising campaign
- CF national standards certification

**2026**

- Implement major gifts campaign
- Implement monthly gifts campaign
- Vital Signs issue awareness, reporting, and resource deployment
- CCF strategic plan mid-cycle updates

**2027**

- Continue to build and refine programs from first three years

**2028**

- Vital Signs community assessment
- Develop CCF 2029-2033 strategic plan

## Key 5-Year Achievements

- \$5 million in unrestricted or field of interest funds
- 50% of assets are long-term
- \$5 million in estate commitments
- Vital Signs defined, prioritized, and improving according to targets
- Increased nonprofit capacity and number/size of long-term agency finds
- \$1 million CCF operations fund