



**Community  
Foundation**  
OF THE EASTERN SHORE

**Strategic Plan**  
**Executive Summary**  
FY 2021-2026

# TABLE OF CONTENTS

Introduction .....	2
Defining Our Work:	
Mission, Vision, Values .....	3
The Core of Our Strategy .....	4
Organizational Pillars .....	5
Strategic Planning Workgroup .....	6
Strategic Priorities .....	7

# INTRODUCTION

October 20, 2020

At the Community Foundation of the Eastern Shore, responsiveness and inspiration have always been important principles. This year our team has been put to the test in an unprecedented and unexpected way.

Thanks to our solid structure, strong board and committee oversight, sound investments, and committed staff, we have been able to adapt quickly to world events and provide urgent relief and support within our own community. By adjusting course to respond as needed, we have remained the steady vessel dedicated to building local nonprofit capacity, investing in future generations, and inspiring donors to embrace their passions through charitable giving.

**We have been able to provide business continuity.**

This year also showed us how critical it is for CFES to prepare for unforeseen and unforeseeable scenarios. This document is designed to help us prioritize, make decisions, and minimize risks while enhancing our internal and external processes.

The strategic planning process began in February 2020 and included opportunities for input and feedback from community leaders, partner agencies, advisors, board and staff, and other stakeholders. Our cumulative work towards continuous improvement will make us a stronger and more impactful leader in working to improve the quality of life in our region.

Many thanks to all who provided guidance throughout this strategic planning process. The work is just beginning...

# DEFINING OUR WORK

## OUR MISSION

Inspiring community philanthropy and connecting people who care with causes that matter.

## OUR VISION

Create thriving communities on Maryland's Eastern Shore where we can live and prosper together.

## OUR VALUES

**Accountability** - We keep commitments, achieve results, exercise sound judgment, and accept responsibility for our performance in all our decisions and actions.

**Collaboration** - We embrace our shared responsibility in working toward productive solutions to strengthen our community. We will work to facilitate the most favorable solutions for those we serve, to build consensus in the face of adversity, and to empower others to build lasting partnerships.

**Equity** – We embrace and respect the differences that make our communities strong. Diversity in all its forms is key to our collective success. We encourage inclusivity of perspective, experience, abilities, and ideas to identify needs and create opportunities to improve the quality of life in our region.

**Integrity** - We believe it is not only important to know the right thing to do, but equally important to do the right thing and be above reproach in all we do. It is the cornerstone of our values.

**Leadership** – We strive to be innovative, compassionate, and diligent in our efforts to serve as the respected resource for regional philanthropy. We will seize the initiative and challenge others to improve the communities we serve.

**Transparency** - We provide information that will empower stakeholders to make informed decisions. We believe it is the best way to prove to others we are upholding our values and to make mutual trust possible and our actions understandable.

# THE CORE OF OUR STRATEGY

Our strategic intent is to improve the quality of life on the Lower Shore by supporting and inspiring donors and providing quality and robust services to nonprofits.

We intend to achieve this by:

## **CONDUCTING SOLID RESEARCH:**

We will quantify and communicate the collective impact of our grant making and leadership through data driven decisions and measurable outcomes. We will make objective and meaningful decisions about our processes, policies, appeals, communication, services, and programs.

At the core of these decisions will be a system that supports Effectiveness, Efficiency, and Evidence while committing to preserving and even enhancing community goodwill.

## **SHARING BEST PRACTICES:**

We will learn from others in the field, learn from our own staff and volunteers, and share proven best practices with our internal and external constituents.

We will make intentional and continuous improvement in all areas of our work and will adjust our best practices as needed to provide the most relevant tools to all our stakeholders.

## **ENHANCING COLLABORATIVE WORK:**

We will continue to collaborate with local, regional, and national for-profit, governmental, and nonprofit entities to enhance our collective impact and engage a new pipeline of volunteers and donors.

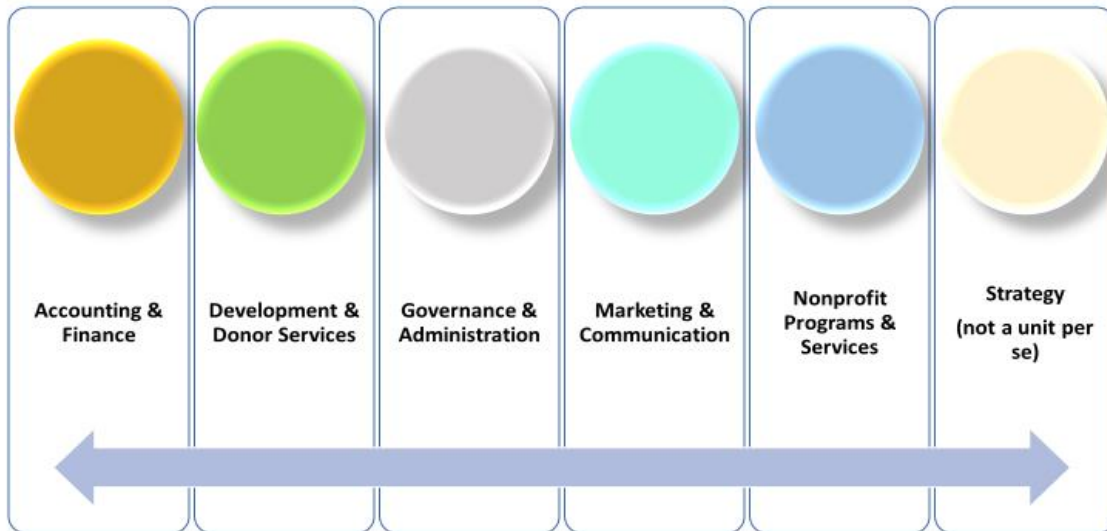
We will enhance internal interdepartmental collaboration and utilize skills and knowledge to benefit the entire organization.

## **THE DRIVERS IN ALL OF THE STRATEGIC PRIORITIES WERE**

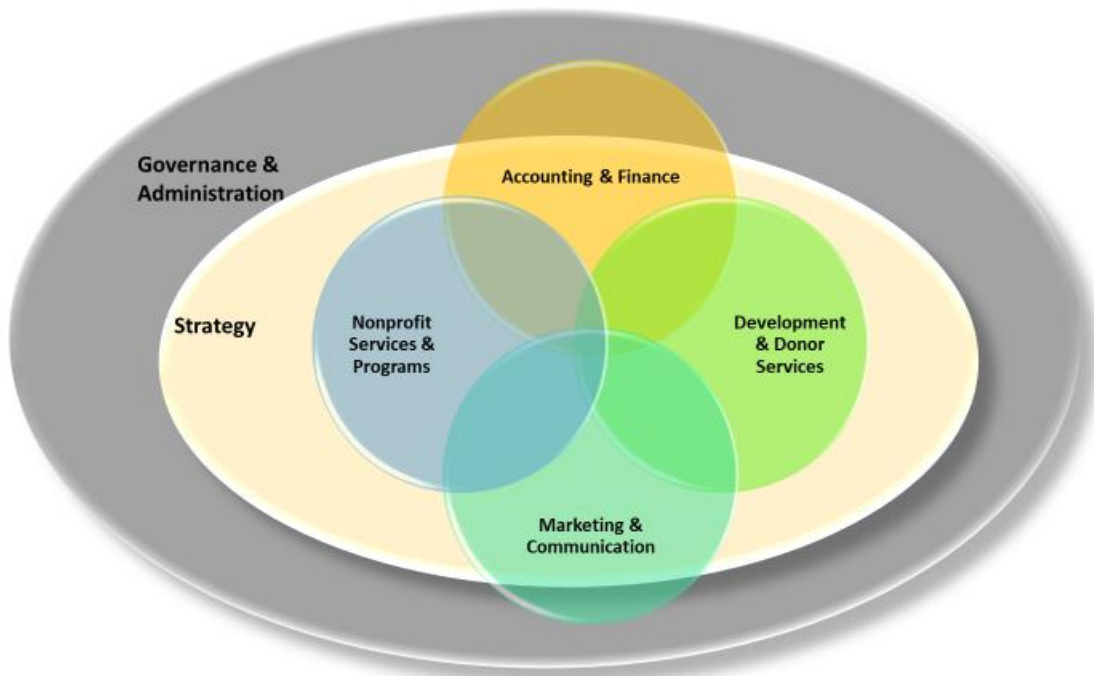
- Community Impact
- Diversity, Equity, and Inclusion
  - Donor Services and Engagement
- Engagement of a New Pipeline of Supporters
  - Leader in Philanthropy
  - Nonprofit Development
  - Process Improvement

# ORGANIZATIONAL PILLARS

CFES currently has 5 distinct departments or pillars. Before the end of the Strategic Plan, decisions will be made about ways to enhance operations by either re-aligning or securing new positions (or both) based on needs and process improvement decisions. The current pillars are as follows:



The work in all departments directly or indirectly affects all other units. Therefore, internal collaboration is necessary for effective decision making.



# STRATEGIC PLANNING WORKGROUP

The Strategic Planning Workgroup was made up of 12 members who represented various industries, geographical areas, and diverse experiences and skillsets. The workgroup included Board members, donors, community leaders, and committee members. All were familiar with the work of the Community Foundation of the Eastern Shore from various perspectives.

The workgroup met from mid-August to October 20, 2020. The meetings were held via zoom. The workgroup was responsible for guiding us in keeping the big picture in mind, raising philosophical questions, and helping us develop action steps.

The staff developed strategies around the suggestions made by the workgroup and sought solutions to questions raised by the workgroup. This kind of communication enabled both the workgroup members and the staff to think through challenges and opportunities and provide clear objectives and projected outcomes.

NAME	COUNTY	TYPE OF STAKEHOLDER
John Allen	3 counties	Donor - Past Board Chair
Larry Campbell	Worcester	Donor
Carolyn Johnston	Wicomico	Donor - Exec. Committee Member
Jim Jones	Worcester	Current Board Member – Incoming Board Chair
Dean Lewis	Worcester	Donor - Current Board Member
Marty Neat	Wicomico	Donor - Past Board Chair
Melody Nelson	Somerset	Donor - Past Board Chair
Paula Morris	Worcester Wicomico	Donor
Jan Perdue	Worcester	Donor – Board Member
Carrie Samis	Somerset	Nonprofit Partner – Committee Member
Danny Thompson	Somerset	Nonprofit Partner, Community Leader
Sonya Whited	Wicomico	Donor – Committee Member
*Mike Truitt - Ex-Officio*		

# STRATEGIC PRIORITIES

After reviewing and analyzing input from various stakeholders throughout the first half of 2020, the **strategic priorities** for the next 5 years were identified as follows:

## **Short-Term (FY 21):**

- Operational Optimization - During & Post Covid
- Grow Capacity and Strength of Nonprofits
- Enhance Operations and Effective Utilization of Technology

## **Medium Term (FY 22-23)**

- Operational Optimization - During & Post Covid (Phase 2)
- Grow Capacity and Strengths of Nonprofits (Phase 2)
- Enhance Operations and Effective Utilization of Technology (Phase 2)
- Engage Next Generation of Donors
- Grow Legacy Society

## **Long-Term (FY 24-26+)**

- Grow Capacity and Strengths of Nonprofits (Phase 3)
- Enhance Operations and Effective Utilization of Technology (Phase 3)
- Engage Next Generation of Donors (Phase 2)
- Grow Legacy Society (Phase 2)
- Grow Assets and Grants Awards in all 3 Counties
- Define priorities for FY 27-32

**Worksheets** for the short-, medium-, and long-term strategic priorities were developed and included the following benchmarks to measure progress and success over time:

1. Action steps
2. Staff person responsible for each action step
3. Internal involvement of other departments, if necessary
4. Timeline
5. Performance measures
6. Resources (current and/or needed)
7. Indicators of progress made

All **departments** within the Community Foundation of the Eastern Shore are going to play significant roles with the implementation of the Strategic Plan. What follows is a description of the departmental responsibilities for our short-, medium-, and long-term strategic priorities. *While in many cases, only two primary departments are listed, many action steps will require the collaboration of more than two departments.*