

## VISION

**A region of healthy, resilient, thriving communities for all.**

## MISSION

**We invest in the people and places of our region and steward community assets for lasting impact.**



Grand Traverse Regional  
**COMMUNITY**  
FOUNDATION

## OUR CORE VALUES

### Stewardship

We are responsible stewards of the human, financial, and natural resources entrusted to our care and committed to those resources contributing to a sustainable society, environment, and economy.

### Integrity

We build trust and confidence through honesty, transparency, open communication, and fairness; and engage in best practice through National Standards certification.

### Generosity

We cultivate a culture of generosity by celebrating giving of all kinds and by nurturing authentic relationships that are built on empathy, kindness, and trust.

### Collaboration

We listen to diverse voices, build collaborative partnerships, and foster a spirit of teamwork and interdependence.

### Equity

We seek to ensure all people in our community have equitable access to opportunities for a healthy, thriving life and will ensure diversity, equity, and inclusion is reflected in all facets of our work.

### Adaptability

We believe our best work happens as individuals, as an organization, and as a community when we are creative, innovative, and continuously learning.

## OUR STRATEGIC GOALS

### Accountability and Focus

Leverage our resources to ensure organizational strength and stability.

### Awareness and Relationship Building

Increase affinity and build deeper relationships to cultivate a culture of generosity.

### Collaboration and Community Impact

Expand collaborations and steward our resources to maximize community benefit.

### Equity and Inclusion

Deepen investment in diversity, equity, and inclusion to fully integrate equity into our work.



**Grand Traverse Regional Community Foundation  
2022 - 2025 Strategic Plan / Objectives + Strategies**

**ACCOUNTABILITY + FOCUS > Leverage our resources to ensure organizational strength and stability**

**Objective 1: Create an office environment that promotes a collaborative, inclusive work place**

Strategy 1: Secure long-term office space to meet current and anticipated future needs  
Strategy 2: Maintain hybrid workspace solutions and operations

**Objective 2: Maximize stability and sustainability of operating revenue model**

Strategy 1: Review and identify growth potential for primary operating revenue sources  
Strategy 2: Enhance operational stability through Operating Reserve Fund

**Objective 3: Engage in best practices related to organizational policies and workplace standards**

Strategy 1: Maintain National Standards Certification  
Strategy 2: Formalize policy procedures and update/develop new policies as needed

**Objective 4: Promote collaboration, affinity, and continuous learning for staff and Board**

Strategy 1: Promote collaboration, affinity, and continuous learning for staff  
Strategy 2: Promote collaboration, affinity, and continuous learning for Board  
Strategy 3: Ensure long-term strength and stability of staff and Board capacity

**AWARENESS + RELATIONSHIP BUILDING > Increase affinity and build deeper relationships to cultivate a culture of generosity**

**Objective 1: Increase partnerships and engagement with professional advisors**

Strategy 1: Create a process for meeting and engaging new PAs  
Strategy 2: Increase professional advisor referrals by 10% each year

**Objective 2: Effectively engage and support board and staff as ambassadors (to donor, nonprofit, other community partners)**

Strategy 1: Increase Board Engagement with 100% of Board volunteering at least 1-2 times  
Strategy 2: Curate stories that appeal to varied stakeholders and share across all mediums

**Objective 3: Achieve Campaign for Community Funds Goal**

Strategy 1: Strengthen and grow engagement among major donor partners  
Strategy 2: Grow number and value of known planned gifts to Community Funds  
Strategy 3: Strengthen and grow engagement among annual giving partners  
Strategy 4: Create sustainability of DEI Fund

**Objective 4: Increase how we are known and trusted by activating core audiences toward giving, either directly and/or through referrals.**

Strategy 1: Develop and implement comprehensive communications plan annually  
Strategy 2: Increase likelihood of stakeholders to refer the CF for giving (as measured by Net Promoter Score)

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**COLLABORATION AND COMMUNITY IMPACT > Expand collaborations and steward our resources to maximize community benefit**

**Objective 1: Expand sources of community impact beyond grantmaking**

- Strategy 1: Launch Impact Investing Strategy
- Strategy 2: Create opportunities to connect donor partners to community projects and priorities
- Strategy 3: Pursue funding opportunities from outside the region
- Strategy 4: Engage in advocacy efforts aligned with vision and mission.

**Objective 2: Maximize impact of, and build sustainability for, Community Development Strategy**

- Strategy 1: Achieve measurable improvement on minimum of three Community Development Scorecard Objectives
- Strategy 2: Develop strategy for long-term stability and sustainability for Community Development

**Objective 3: Formalize Grantmaking Strategy that integrates DEI and Trust-Based Philanthropy Strategies**

- Strategy 1: Award grants that are unrestricted, for general operating, and/or multi-year
- Strategy 2: Increase access to funding through effective grants systems and processes
- Strategy 3: Increase transparency of grant process, decision-making, and evaluation

**Objective 4: Maximize impact of cornerstone programs/endowments**

- Strategy 1: Leverage the Purdy Endowment within Central Lake and beyond
- Strategy 2: Optimize impact of Larson Endowment
- Strategy 3: Develop enhanced model for YAC as a Youth Leadership Development program

**EQUITY + INCLUSION > Deepen investment in diversity, equity, and inclusion to fully integrate equity within our work**

**Objective 1: Adjust Foundation systems, policies, and procedures to more fully integrate inclusive and equitable language and processes**

- Strategy 1: Evaluate current systems, policies, and processes and identify areas for adjustment
- Strategy 2: Evaluate Board recruitment and governance and processes and determine opportunities to increase accessibility and transparency

**Objective 2: Embrace a culture of learning across the organization related to DEI**

- Strategy 1: Implement ongoing learning plan for staff
- Strategy 2: Implement ongoing learning plan for Board
- Strategy 3: Demonstrate leadership and commitment to continuous learning to internal and external stakeholders

**Objective 3: Ensure staff and board is representative of our community through increasing diversity**

- Strategy 1: Evaluate and identify opportunity to increase diversity of staff and Board