



An initiative of The Community Foundation of Western North Carolina



# Strategic Plan Summary

## 2020/2021 through 2023/2024

Completed August 2020



## Table of Contents

- Process, Timeline, Team ..... Page 3
- Mission & Vision ..... Page 5
- Summary of Strategic Imperatives ..... Page 5
- Measurement ..... Page 10
- Conclusion: Running By the Plan ..... Page 12

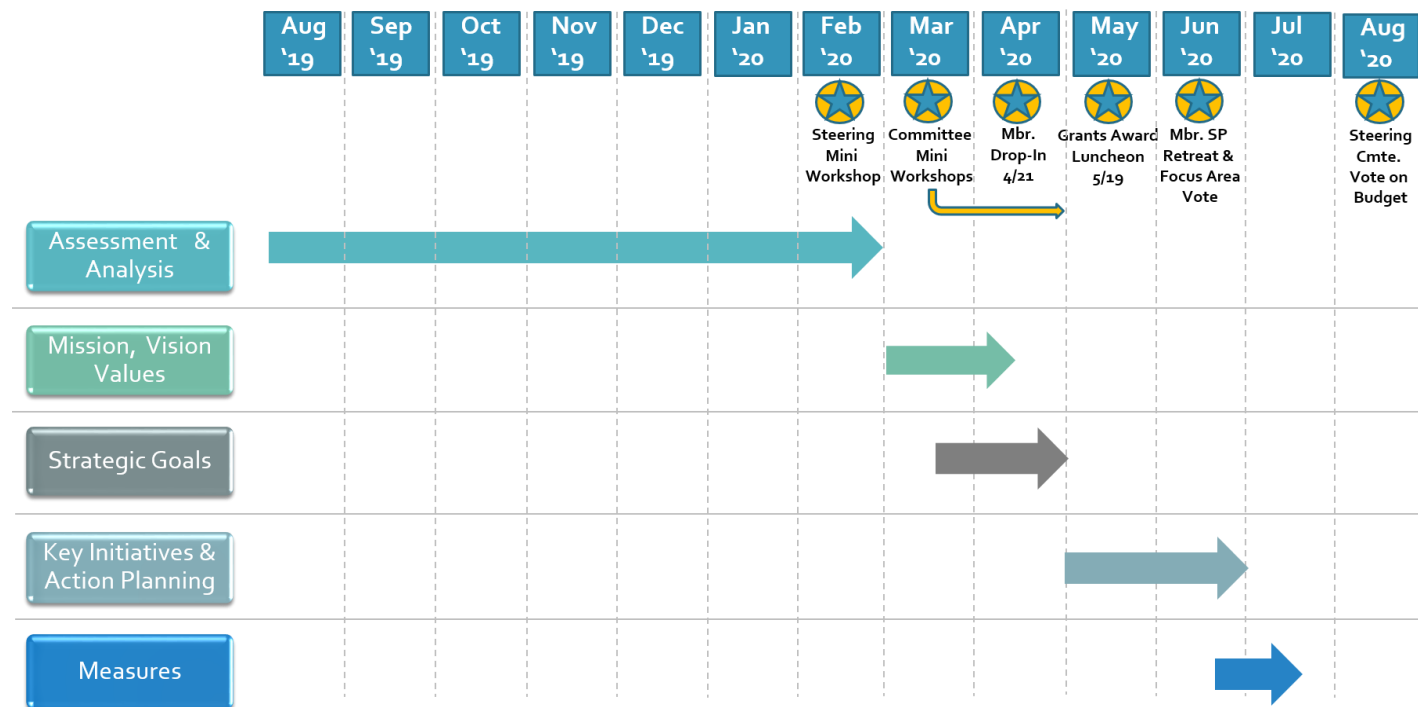
## Process

The *Women for Women* (WFW) Strategic Planning process – designed and facilitated by The Satori Group, Ltd. [www.thesatorigroupltd.com](http://www.thesatorigroupltd.com) on a pro-bono basis – included five key steps:



## Timeline

The Strategic Planning initiative was conducted over a period of one year, from August 2019 to August 2020.



## Team

The WFW Steering Committee appointed an Ad Hoc Strategic Planning team to complete the work, and is indebted to the following members who invested significant time and energy in crafting a rigorous and professional plan:

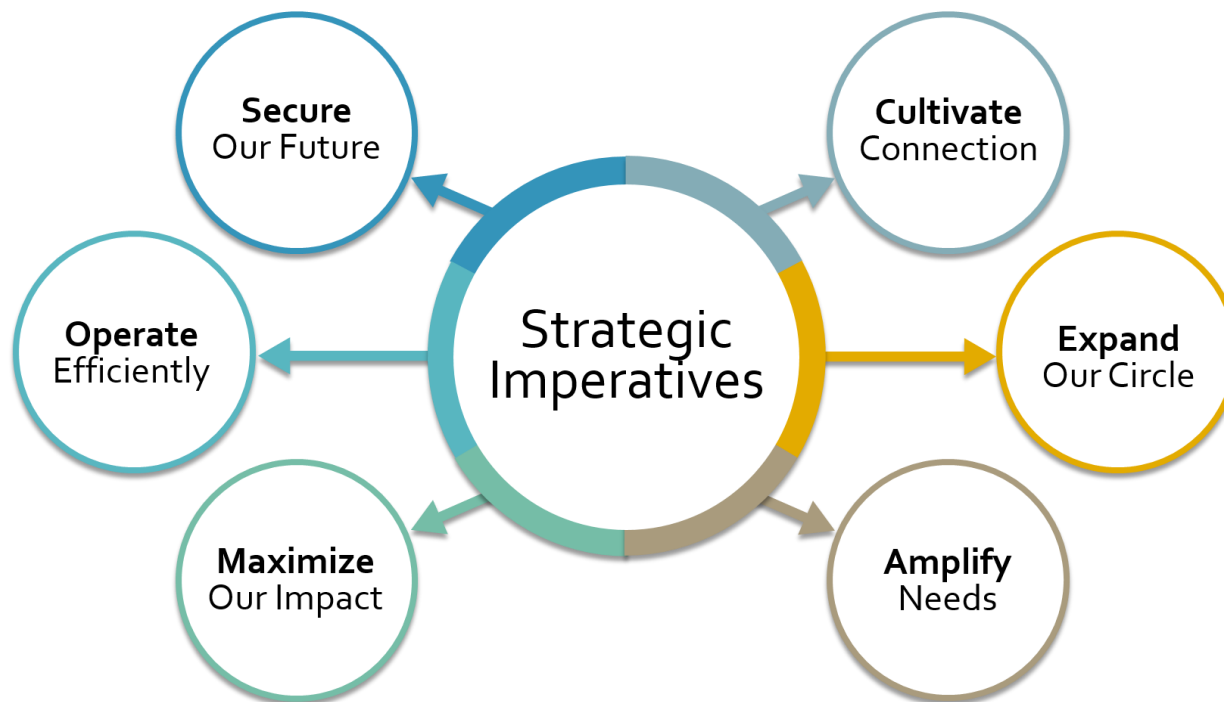
Jennifer Adams	Lyndi Hewitt	Kathy Rauch
Carrie Coward	Sheila Horine	Jewel Tavener
Jacqui Friedrich	Pam Lane	Janet Thatcher
Sydney Green	Janice Lato	

## Mission and Vision

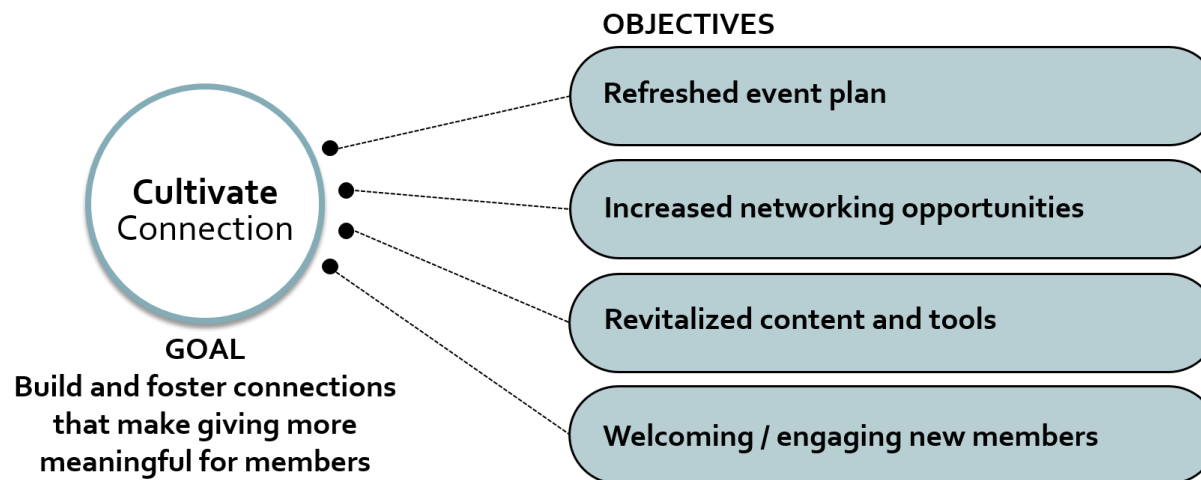
As part of this process, the Strategic Planning team and the Steering Committee reaffirmed the **WFW Mission** – to improve the lives of women and girls through women’s collective giving, as well as the **WFW Vision** – to empower women to take action, inspire hope and possibility and strengthen Western North Carolina. It was agreed that no changes were necessary.

## Summary of Strategic Imperatives

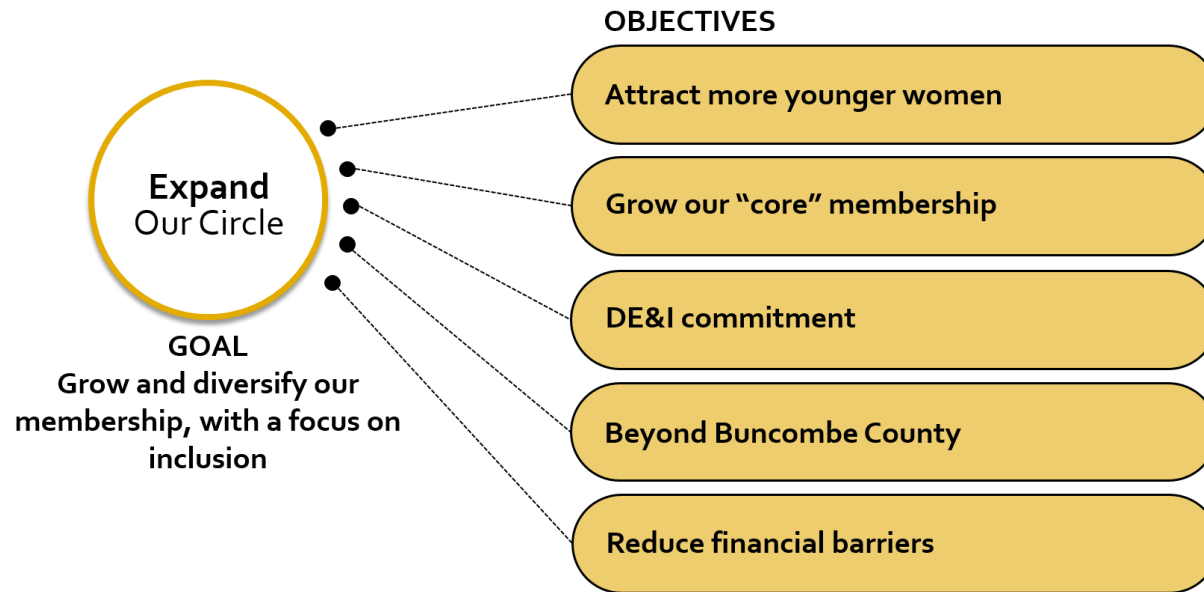
Leveraging the research findings, combined with the benefit of comprehensive work sessions among the Strategic Planning team, the WFW Steering Committee, and the WFW Grants, Advocacy and Education, and Membership and Communications Committees, **six Strategic Imperatives** were identified:

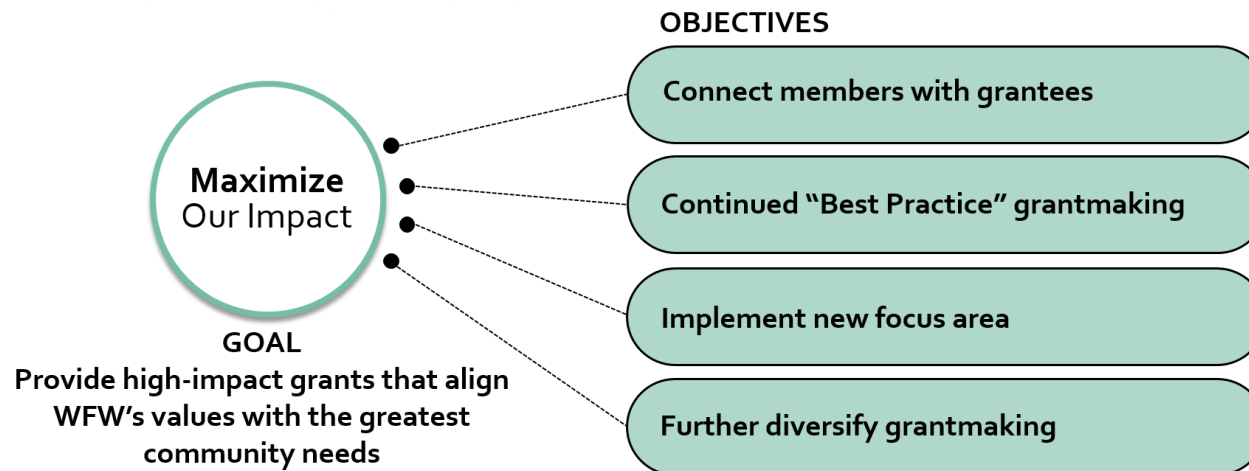
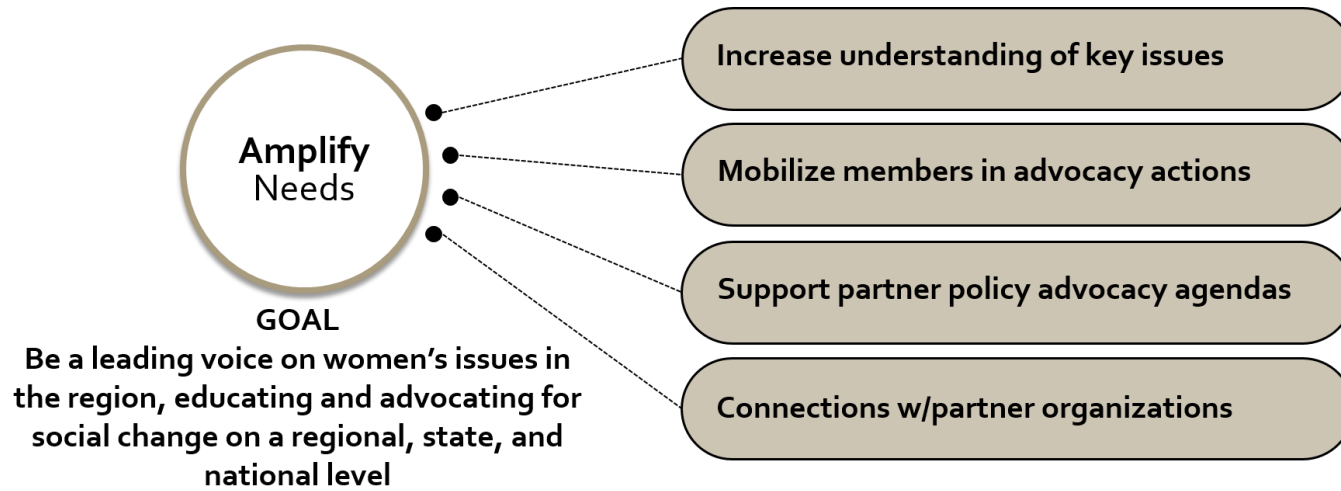


Each Strategic Imperative included a **Goal Statement and Objectives**, tied to a three-year planning horizon.

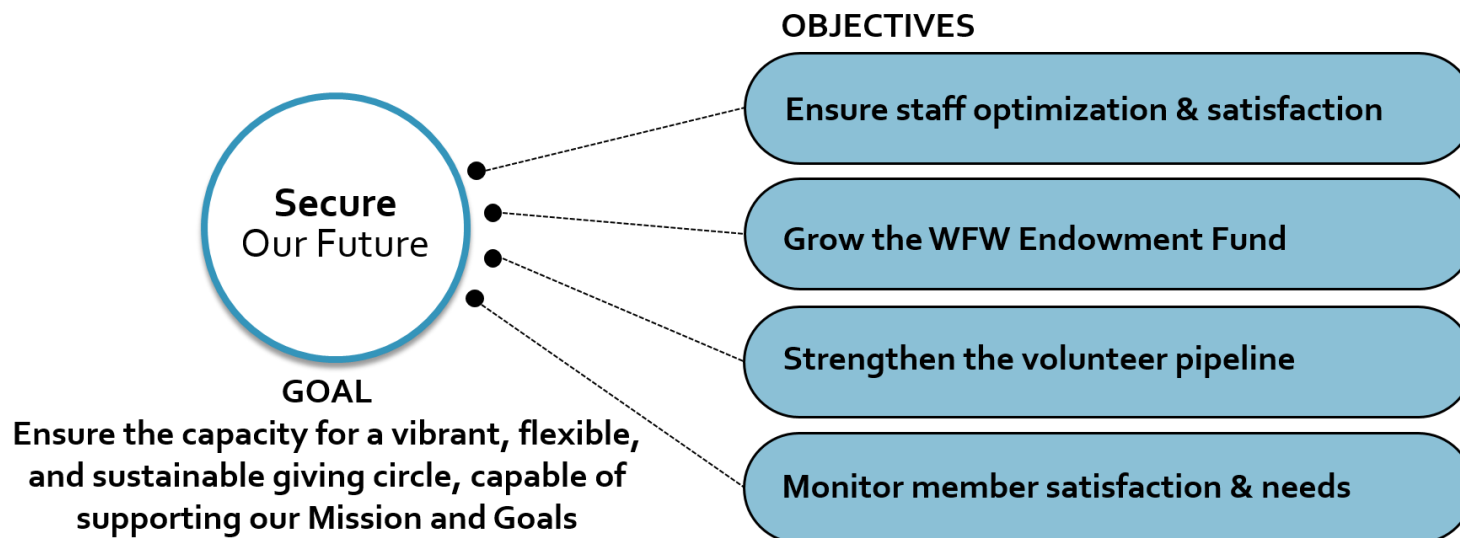
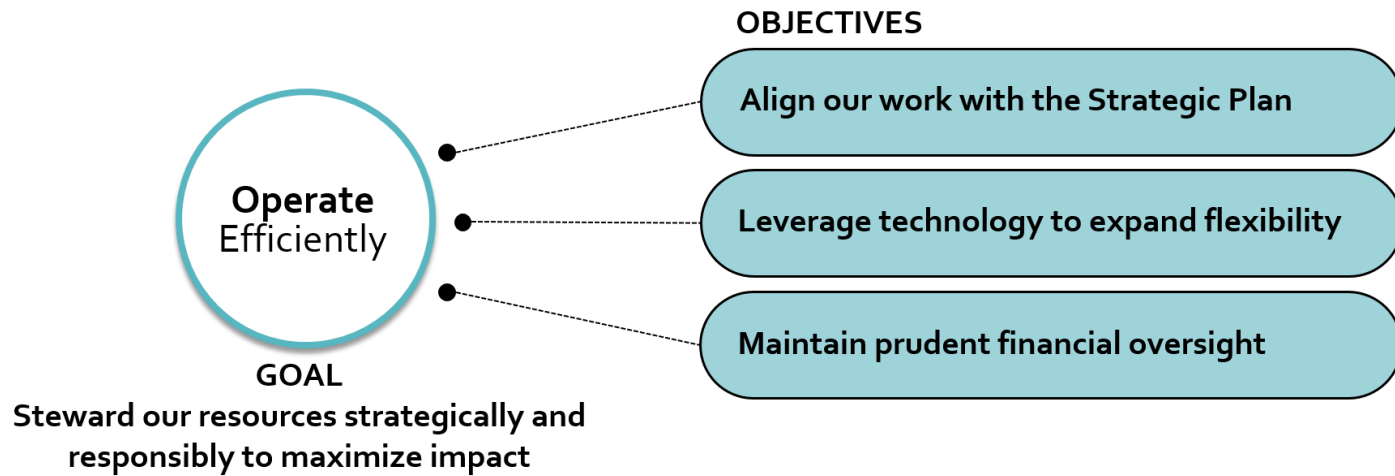


# GOALS & OBJECTIVES









Measurement

The Strategic Planning team worked with Steering and WFW's three other Committees to define **Measurement** at the Objectives Level.

Strategic Imperatives:	Objectives:	Measurement:
<b>CULTIVATE Connection:</b> Build and foster connections that make giving more meaningful for members	Develop an event plan (reset) that fosters networking and learning	1) Event plan developed; 2) Event-specific member feedback
	Increase networking opportunities among members	1) # small events; 2) member feedback
	Revitalize content and tools (as appropriate) to increase connection	1) Social media metrics (followers, open rates); 2) Member feedback re: connections made
	Ensure new members feel welcomed and engaged	1) Event-specific member feedback; 2) Include question (s) in update to larger membership survey
<b>EXPAND Our Circle:</b> Grow and diversify our membership, with a focus on inclusion of diverse experiences, perspectives, and voices	Attract more younger women to our giving circle	% new members < 50
	Establish a shared understanding of and commitment to diversity, equity, & inclusion	1) Commitment Statement developed & communicated across WFW core tools; 2) Implement changes to grants process - include DEI statement; simplify the application; increase understanding of diversity of populations served; 3) Broader DEI plan approved by end of Year 2.
	Expand our reach to our "core"	% member growth in women > 50 years
	Increase reach beyond Buncombe County	# new members from target counties (long-term)
	Reduce financial barriers to membership	# new members resulting from sponsorships and/or shared memberships
<b>AMPLIFY Needs:</b> Be a leading voice on women's issues in the region,	Provide member education and experiences to highlight issues impacting women and girls in Western NC	1) # events; 2) Attendance numbers; 3) Event-specific surveys

Strategic Imperatives:	Objectives:	Measurement:
educating and advocating for social change on a regional, state, and national level	Mobilize members in advocacy actions focused on social change at the regional, state and national level	1) Member Awareness of advocacy (survey); 2) Frequency of communications about advocacy; 3) Action tracking via quick surveys
	Support partner policy advocacy agendas consistent with our guiding policy principles	TBD - Research needed on best practice
	Offer more opportunities to connect members with partner organizations and the communities they serve	1) # opportunities offered (vs. previous); 2) Include question (s) in update to larger membership survey (e.g. did you do new/different things)
<b>MAXIMIZE Our Impact:</b> Provide high-impact grants that align WFW's values with the greatest community needs	Offer more opportunities to connect members with grantees and the communities they serve	1) # opportunities offered (vs. previous); 2) Include question (s) in update to larger membership survey (e.g. <i>feel</i> more connected; actions to be more connected?)
	Continue to review / refine grantmaking process based on evolving Best Practices	Provide annual audit/report to Steering Committee on trends/changes planned and/or implemented
	Implement new focus area recommendation	1) Meet required timelines; 2) (If needed): Adapt GC structure/process to successfully accommodate growth in LOI submissions
	Seek opportunities to further diversify grantmaking and reach underserved populations	1) Yr. 1 - Historical data gathered/analyzed; baseline established; targets set; 2) Yrs. 2 & 3 - Progress toward targets (\$ granted; # organizations covered; etc.)
<b>OPERATE Efficiently:</b> Steward our resources strategically and	Align Contract Staff, Committee work with Strategic Plan goals and objectives	1) Agenda alignment; 2) SP updates; 3) Steering Committee survey (yr-end)

Strategic Imperatives:	Objectives:	Measurement:
responsibly to maximize impact	Leverage technology to expand our flexibility and reach as we grow	1) Member feedback on tools
	Maintain prudent financial oversight to assure accountability to budget	Manage within budget
<b>SECURE Our Future:</b> Ensure the capacity for a vibrant, flexible, and sustainable giving circle, capable of supporting our Mission and Goals	Ensure contract staff optimization and satisfaction	1) Run to Best Practices; 2) Efficiency/ best use of resources; 3) Include satisfaction questions in annual staff assessment
	Grow the WFW Endowment Fund	% growth of endowment
	Strengthen the volunteer pipeline to support leadership development and succession planning	1) Availability / alignment of volunteer resources to support annual plans; 2) % training participation
	Systematically monitor member and key volunteer satisfaction / evolving needs	1) Include satisfaction question (s) in update to larger membership survey

## **Conclusion: Running By the Plan**

The WFW Steering Committee has committed to “run by the plan,” guided by the following actions:

- Over the course of several “deep dive” work sessions, each of the Committees of WFW defined its three-year action plans. [These action planning grids (for all three years) can be found in the complete Plan document.]
- Prior to each Steering Committee meeting, Committee Chairs will update the status of their current-year actions in a shared Google drive document
- The agenda for each Steering Committee meeting includes a highlight of those status updates.
- The annual planning process begins with Committees providing a review of their accomplishments against the current year action plans. Actions plans for subsequent years – as initially defined in the Strategic Plan – are then reviewed and refined for the upcoming fiscal year (adjusted to reflect changes, carryover actions, etc.).