

**GREATER POWESHIEK COMMUNITY FOUNDATION  
2015 STRATEGIC PLAN**



**GREATER POWESHIEK  
COMMUNITY FOUNDATION**

*We Grow Community Through Giving!*

**Submitted by: Greater Poweshiek Community Foundation Board of Directors & the  
Strategic Planning Committee**

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## Executive Summary

The Greater Poweshiek Community Foundation (GPCF) Strategic Plan provides the Board of Directors and staff with a history of the Foundation, a peer comparison, a look at community and Foundation needs and a road map for the future. In the last decade GPCF has seen rapid growth with the hiring of the organization's first staff, achieving its National Standards Certification, and expanded programming and funding.

Since the first community foundation began in 1941, organizations have looked at long-term goals and how to fulfill them. GPCF's strategic plan will focus energy and resources on a defined set of priorities to ensure that members of board and staff are working towards common goals. This document will also provide an avenue to assess and adjust the direction of the organization on an ongoing basis.

In 1941 the first community foundation was created in Cleveland by Frederick Goff. Today 1,700 community foundations exist all over the world with approximately 700 in the United States including the Greater Poweshiek Community Foundation.

## Situation Analysis

**History.** Since its founding in 1989, Greater Poweshiek Community Foundation (GPCF) has served the greater Poweshiek County by providing a mechanism for donors to effectively invest in the welfare and future of their communities.

Credit for the concept of a vehicle for community giving goes principally to Tom Marshall, a community member, and his vision to have a permanent "nest egg" to fund noteworthy community projects. He shared his vision at a meeting with the Grinnell Newburg School's Foundation Directors discussing how charitable organizations, educational institutions, and donors, could be better served through one philanthropic effort. At the end of the meeting, the School Board of Directors concluded that they would support a community foundation in lieu of a separate school's foundation and GPCF was born.

"Fragmentation would hurt individual efforts and...cooperation would expand everyone's capacity to succeed for the common good"  
(Philip Yount, first GPCF Board Chair).

Early on and throughout the 1990s GPCF acted as a pass-through for scholarship funds and memorials. Growth continued as area businesses and individuals stepped forward to donate to newly formed funds managed by GPCF.

The 2000s were a busy decade that propelled GPCF into a new role in the community as manager of community campaigns, grant maker, and umbrella agency for local nonprofit organizations.

In 2003, members of the Grinnell-Newburg Board of Education and local citizens met to discuss how to raise money to pay for improvements to Grinnell High School. Partial funding could be obtained from the Local Option Sales Tax (LOST) and the rest from a bond issue which needed approval from the voters in the school district. This group felt that if they could raise \$2 million in private fundraising then they could convince voters to approve the bond issue. This led to the campaign for the high school. Tom Marshall, President and Founder of GPCF, met with the school district's fundraising group and offered GPCF's services. He offered to support the fundraising effort by keeping track of the pledges, income and thank-you's. However, he quickly realized that the GPCF board could not do this as volunteers and hired a local accountant to do the work. The campaign was a success, raising \$3.8 million dollars and 67% voter approval.

In 2004, GPCF began to explore becoming a nationally certified community foundation, taking advantage of two newly legislated state programs focused on increasing philanthropic activity in Iowa. Both programs, The Endow Iowa Tax Credit Program and the County Endowment Fund Program were implemented through community foundations that were nationally certified. The latter program was funded by a percentage of the state's commercial gaming revenue that was distributed annually to participating community foundations associated with counties without a state-issued gaming license.

GPCF initiated discussion of an alliance with the Montezuma and Brooklyn community foundations to receive Poweshiek County's share of the gambling revenue. Such an alliance required that GPCF meet the National Standards for Community Foundations Certification and for the three foundations to establish a grant distribution committee. This led to the formation of the Poweshiek County Alliance (PCA), an endowment and grant program for nonprofits and charities in the county. PCA was temporarily affiliated with the Northeast Iowa Community Foundation, a qualified community foundation. To date, Poweshiek County Alliance has distributed more than \$730,000 in grants and has built a \$340,000 endowment.

In 2005, a partnership with the Claude W. and Dolly Ahren's Foundation and their Community Support Services (CSS) program was formalized with GPCF. This program was provided free of charge to GPCF for the first four years. The partnership allows GPCF to provide a range of services that include fund management, donor education, marketing and administrative assistance to other nonprofits, allowing individual boards to focus on their mission. The Grinnell Newburg Alumni Association, Grinnell Newburg Educational Excellence (GNEE)

and the Communities for Literate Iowa Kids (CLIK) were some of the first nonprofits to come under the GPCF's partnership "umbrella."

Another milestone for GPCF came in 2009 with the hiring of two staff persons. This gave GPCF the capacity to assist nonprofit partners with expanded program management, marketing, and fundraising activities.

One of the most celebrated events in GPCF's history came in 2010 when the Foundation was awarded its National Standards for Community Foundations Certification from the Council on Foundations. The National Standards provide community foundations with a structure for establishing and implementing legal, ethical, and effective practices that withstand the scrutiny of donors, government and media. Because of the National Standards Certification, gifts to endowed funds managed by GPCF were eligible for the Endow Iowa Tax Credit, issued by the Iowa Economic Development Authority. Giving to endowed funds increased dramatically after GPCF received its National Standards Certification.

Today GPCF manages over 120 different funds including scholarships, endowments, pass-through funds and campaigns for nonprofits and donors. Since 2009, GPCF's net assets have increased from \$2.4M to \$6.7M today.

### **GPCF Service Area Needs**

A review of the GPCF service area needs and peer community foundations was compiled by the board of directors to consider when defining priorities and goals for Poweshiek County. Funding opportunities that address service area needs will have a greater impact on the overall health of the region.

*Poweshiek County.* Poweshiek Iowa Development (Pow I-80) is a 501(c)(3) organization that leads the county's economic and community development efforts. The organization uses their expertise to develop, educate, manage, connect and invest to strengthen businesses and help the GPCF service area thrive. As the GPCF board considers priorities and goals, Pow I-80 will be an important partner providing information about service area needs.

*Brooklyn.* Working with Pow I-80, the Brooklyn Economic Development (BED) group identified the following individual community needs in 2011: expand scholarships for leadership classes and the leadership program, promote the community's industrial park and create a business improvement fund with BED.

*Grinnell.* In the fall of 2010, GPCF convened a task-force to gather input for an assessment of the Grinnell community. This 14 month process culminated in the summer of 2012 with a "Top 10 List" of future projects including: a public restroom downtown, passenger rail to Des Moines and Iowa City, a local public transportation system, enforcement of city codes, and restoration of downtown buildings.

The following projects were secondary in their priority but noteworthy as needs: new K-8 school within walking or biking distance, more traffic regulation at busy intersections, downtown hotel, alternative facility for conferences/meetings/events, and better directional signage.

Montezuma. The Montezuma Community assessed public input in the summer of 2009 in order to create a Monte 2020 Public Input list. Residents were asked to rate by importance a series of needs or opportunities and the surveyors received 654 total responses. Of highest importance was retaining health professionals, maintaining amenities, recruiting new industry/businesses and keeping a k-12 school in the community. The community also notes the need to create a new daycare facility.

**Peer Community Foundation Study.** A study of peer Iowa community foundations with assets of \$20 million or less provided comparative data for the GPCF Strategic Plan. As the board and staff look for ways to implement goals consider changes to policy, fees and services this information will be useful.

## Strategic Intent

**Vision (Tag Line):** We grow community through giving.

**Mission:** The Greater Poweshiek Community Foundation is committed to strengthening communities and inspiring philanthropy by:

- Connecting donors with organizations and causes
- Investing funds responsibly
- Giving back to the greater Poweshiek service area
- Supporting nonprofits
- Facilitating community partnerships

Greater Poweshiek Community Foundation's **Core Values** include:

**Generosity-** to give with the desire to help others

**Integrity-** to operate with respect, honesty, accountability, and fairness

**Collaboration-** to work together to produce extraordinary results

**Excellence-** to aim for the highest standards in every endeavor

## Strategic Priorities & Goals

### Priority 1 - Connecting donors with organizations and causes

Goal 1.1-Increase donor knowledge, engagement, and empowerment to make a difference in the issues donors care about.

Goal 1.2-Expand donor giving options.

Goal 1.3-Provide our donors with services and support they value.

### Priority 2 - Investing funds responsibly

Goal 2.1-Ensure GPCF sustainability in the future.

Goal 2.2-Increase GPCF, donor and nonprofit partner assets under management.

Goal 2.3-Ensure prudent management of funds.

### Priority 3 - Support to the greater Poweshiek service area

Goal 3.1-Design and deliver grants and initiatives to enhance nonprofits and respond to service area needs.

Goal 3.2-Increase funds that flow back to the community.

### Priority 4 - Supporting nonprofits

Goal 4.1-Facilitate nonprofit partner growth and success through valued services.

Goal 4.2-Encourage mission-driven outcomes for GPCF and nonprofit partner grant making.

Goal 4.3-Encourage endowment building for nonprofit partner sustainability.

### Priority 5 - Facilitating community partnerships

Goal 5.1- Serve as a catalyst for transformational leadership.

Goal 5.2- Increase efficiencies through collaboration.

## Evaluation

Focusing on identified community needs, the GPCF mission and goals will be the driving force behind the GPCF Strategic Work Plan, an internal action plan.

The GPCF Strategic Plan will be reviewed annually in September by the Strategic Planning Committee.



