



2023 -2028 Strategic Framework Update to Board of Directors



The Community Foundation for the Greater Capital Region **strengthens the community through philanthropy.**



- We do this in collaboration with donors and community partners who share a vision for community transformation through stewardship of charitable endowments, superior donor services, effective grantmaking and leadership to address community needs.
- We work every day to build a more vibrant, equitable and just community where everyone has access to opportunities so they and their families can thrive and succeed.

Catalytic & Inclusive Philanthropy: *Use all resources to drive positive change!*

Future

Donor Development & Focused Growth

GROW Philanthropy

- ☐ Preserve & Celebrate Giving Legacies
- ☐ \$150MM by 2027
- ☐ Grow BIPOC, Latinx, Family, Women, LGBTQIA+, Next Gen., Business Funds
- ☐ Transition Private Found.
- ☐ Grow Discretionary Endowment for Impact
- ☐ Enhance Donor Experiences

- ✓ Campaign for Impact \$8.2MM Secured
- ✓ 2016-2021 / \$65MM Gifts Received; \$49MM Grants & Scholarships Disbursed
- ✓ Responsive Donor Services
- ✓ New BIPOC Funds
- ✓ FFS w/Private Expanded

Community Investment & Sustained Impact

LEAD Impact

- ☐ Make Equitable & Impactful Grants; Measure; Guide
- ☐ Lead in IDEA, Leadership Development & Nonprofit Capacity Building
- ☐ Research, Convene & Invest for Collective Impact (Rubin)
- ☐ Grow Public Policy & Advocacy (systems)
- ☐ Launch Local Impact Investing / ESG Pools

- ✓ \$115MM Disbursed since 1968
- ✓ GHFI - \$1.4MM; ACE Sustained
- ✓ Cap. Region Indicators Launched
- ✓ COVID Response; IDEA: Catalysts & Board Inclusion Launched
- ✓ Rubin Fund Launched
- ✓ Capacity Building Expanded
- ✓ Online Grants Enhanced

Operational Excellence / Impeccable Stewardship

BUILD Sustainability

- ☐ Complete Database/System Conversion
- ☐ Build Business Continuity & Redundancies
- ☐ Analyze & Adjust Fee Structure
- ☐ Maintain Certifications
- ☐ Lead in Staff Compensation, Support & Inclusive Culture
- ☐ Staff & Board Represent Tri-City Demographics

- ✓ WIDE Dynamic Assessment
- ✓ 10 - IDEA Organization Goals
- ✓ COF Standards / Candid Platinum Seal of Transparency
- ✓ New Staff; All Staff to 75th percentile (COF Salary Survey)
- ✓ CFGCR Commitment to IDEA
- ✓ Board Diversity Matrix/Goals

Brand Amplification



BE Known

- ☐ Raise the Region vision
- ☐ Storytelling / Legacy Inspiring / Make Known
- ☐ Celebrate Diversity & WEAVE
- ☐ Inform & Inspire Belonging & Giving Back
- ☐ Enhance Digital/Social Media Presence
- ☐ Create Community Report Cards on Progress
- ☐ Hold Exemplary Reputation

- ✓ Website Enhancements
- ✓ Social Media Learning & presence
- ✓ CFGCR Online Grants
- ✓ Donor Portal Improvements
- ✓ Video / Storytelling
- ✓ CEO Statements; Blog Stories

Past Wins

CFGCR MISSION: *Strengthening our community through philanthropy*

Key Themes

Be Known



**Maximize
convener role
where possible**



**Narrow our
focus to key
priority**



**Influence
public policy
and systems
with caution**



**Increase
awareness and
understanding
of the
foundation**



**Build strategic
collaborations**



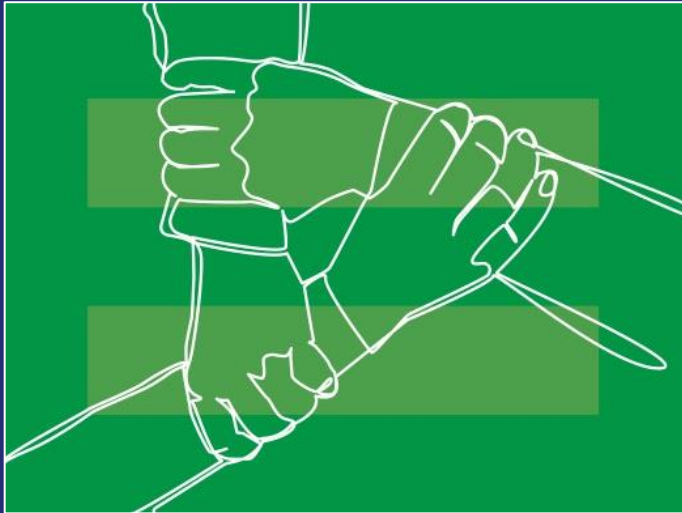
**Build next gen
philanthropists**



**Educate donors
on community
issues**

Board Discussion

GOING ALL IN



Insisting on Racial Equity

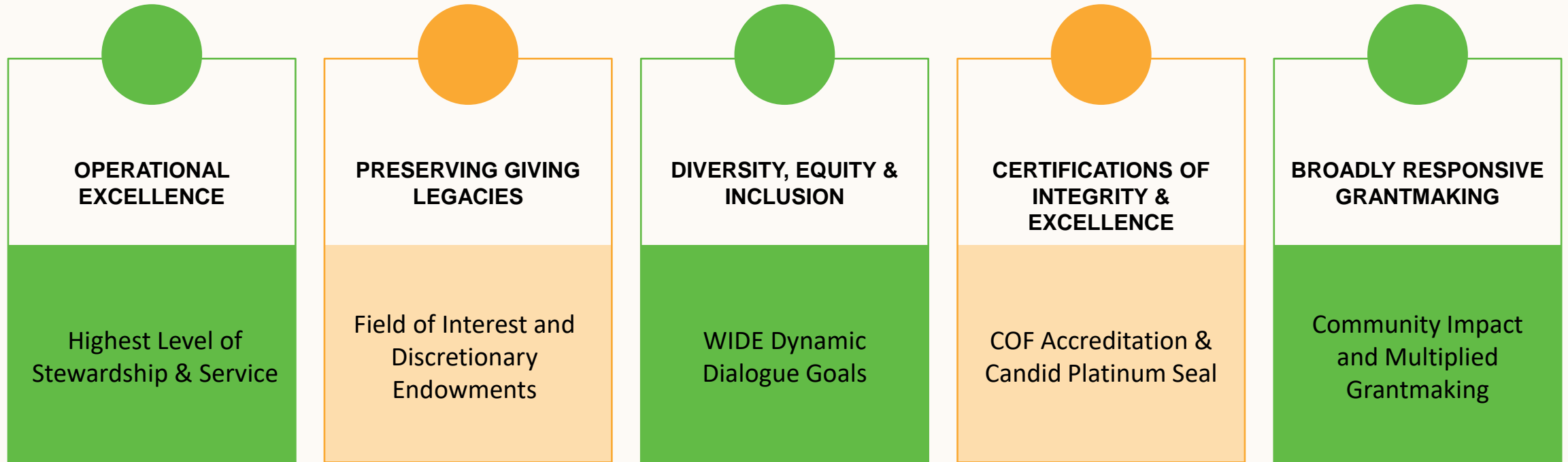


Amplifying Community Voice



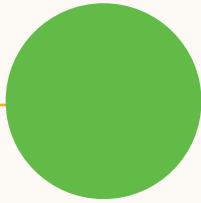
**Influencing Public Policy
& Systems**

OUR COMMITMENTS



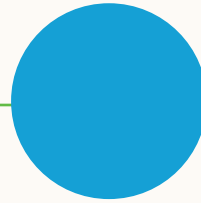
OUR STRATEGIC FRAMEWORK

Three Interdependent Focus Areas



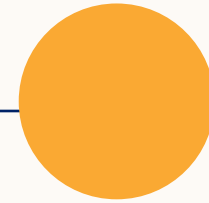
INSPIRE PHILANTHROPY

We will inspire a culture of generosity, strengthen relationships with donors, and pursue innovative ways to grow philanthropy.



ELEVATE COMMUNITY

We will strengthen and expand ~~people's~~ **everyone's** impact on ~~their~~ **our** community through partnership, convening, grantmaking, and service.



STRENGTHEN OUR CORE

We will responsibly steward the resources entrusted to us and invest in our internal capacity to ensure excellence in service and operations.



Inspire Philanthropy

We will inspire a culture of generosity, strengthen relationships with donors, and pursue innovative ways to grow philanthropy.

Strengthen our Core

We will responsibly steward the resources entrusted to us and invest in our internal capacity for excellence in service and operations.

Strengthening our community through philanthropy

Elevate Community

We will strengthen and expand people's impact on their community through partnership, convening, grant making, and service.

STEEP / SWOT

What social, technological, economic, environmental, political and other factors impact the Foundation's programs, management, governance, financial resources, and administrative systems? 3/7/2024

Strengths <ul style="list-style-type: none">• Grantmaking & Initiatives; Catalysts, Capacity Building• Trust, stewardship, reputation, business continuity/remote• Fee-for service with private foundations• Community relations and knowledge• Donor relationships and satisfaction• Skilled core team; Ability to convene & facilitate• WIDE Dynamic Dialogue assessment and plan• Certifications and Seals / Foundant C-suite conversion	Weaknesses <ul style="list-style-type: none">• Lack redundancies and capabilities• Some projects struggling; GHHL, Community Indicators• Branding recognition; general public unaware of CF• Lack of endowed discretionary funding• Capacity to engage emerging donors• Lack public policy advocacy to drive change• Little neighbor, neighborhood connection
Opportunities <ul style="list-style-type: none">• Capital Region Business/Wealth Climate• Community Leadership & Co-funding• Fee For Service with Private Foundations• Next generation donors – growing entrepreneurial ecosystem• Collective Impact, place-based approaches• Team synergy/alignment / Growing diverse board and staff• Campaign for Impact \$8.2MM / Kenney Estate \$7MM• AI integration across disciplines / collective impact• Blockchain	Threats <ul style="list-style-type: none">• Market & world volatility / Impact fees & development• Lack staff redundancies in certain skill areas• Lack capacity to focus on new/major donor preferences• Decline in trust in NP sector• Competition from commercial funds• Lack regional collaboration - parochialism• Growing wealth gap & unchecked racial/ethnic disparities• Loss of old school philanthropists• Legislation: DAF definitions & rules

Factors influencing philanthropy in 2024

- Loss of old-school Philanthropists & Benefactors / Transfer of Wealth impact TBD, but those inheriting have new ideas / Poverty parsed by race/ethnicity increasing
- Charitable giving peaking or declining and competition for donations is increasing (2022 giving major decline)
- Community needs, homelessness, ALICE (working poor) increasing / Income divide growing
- Rise of trust-based philanthropy – giving with less restrictions and less performance-based reporting (outcomes and impact) vs. Evidence-based practice; Ripple impact Supreme Court (race-based admissions)
- Climate change / technology / AI (pros and cons - exponential digital divide)
- Nonprofit sector issues (overhead myth, business models, marketing, unionization & trust)
 - Multi-bind of increased expenses, wage demands (ALICE workers), increased competition for donors & patrons, increased community needs, & how NYS reimburses (or not)
- Political polarization / uncivil society / DEI and ESG Backstepping / dearth of collective action
- Old vs. new paradigms / Parochialism vs. regionalism
- Shift away from Racial Equity (general DEI focus); Lawsuits challenging grant-making & NP strategies (equity)
- Volatile markets, inflation (costs often don't come back down), cost of living/goods & services (CPI & PCE)
 - Costs of TVs -11.5%; smart phones -15.3% / Insurance, food, housing, energy costs increasing by double digits
 - Gradual decline in personal consumption expenditures (PCE) from 3.2% to 2% by 2025 may be a sign of stability but also means less spending on discretionary activities
 - Albany, Schenectady, Troy county health & health equity rankings in certain zip codes very low

Some references

<https://johnsoncenter.org/wp-content/uploads/2023/01/11-Trends-for-2023-Report.pdf>

<https://www.councilofnonprofits.org/articles/its-real-charitable-giving-plummeted-last-year>

<https://philanthropy.iupui.edu/research/index.html>

<https://givingusa.org/giving-usa-limited-data-tableau-visualization/>

<https://givingusa.org/5-strategies-to-implement-based-on-giving-usa-2023/>

<https://www.capitalregionindicators.org/>

<https://www.healthycapitaldistrict.org/#> and [Healthy Capital District :: SocioNeeds Index® Suite](#)

[Schenectady, New York | County Health Rankings & Roadmaps](#)

[Record Homelessness Amid Ongoing Affordability Crisis | Joint Center for Housing Studies \(harvard.edu\)](#)

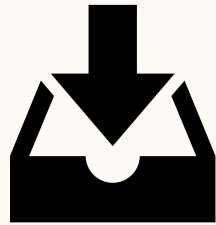
[New York | UnitedForALICE](#)

[REDC Strategic Plan 2023 High Rez.pdf \(ny.gov\)](#)

Interesting read from a philanthropy geek overseas –

<https://whyphilanthropymatters.com/article/what-will-2024-bring-for-philanthropy-and-civil-society/>

CHALLENGES NONPROFIT LEADERS ARE FACING



Hiring and Retention



Compensation and Pay



Capacity Shortage and Burnout



Funding



Lack of Diversity on
Boards



Increased Need



COMMUNITY FOUNDATION GROWTH & IMPACT

8-YEAR LOOKBACK (2016 – 2023)

GIFTS

14,994 Unique Gifts =

\$83,401,221

465 Funds Under Management

GRANTS & SCHOLARSHIPS

11,476 Grants & Scholarships =

\$65,447,005

INSPIRE PHILANTHROPY

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EXPAND AND DIVERSIFY GIVING

- Build awareness on key community voice & issues **(ongoing)** staff outreach, site visits, curated events
- Align stewardship activities with donor interest **(ongoing)**
- Collaborate with regional funders **(ongoing)**
- ✓ Curated events, **Raise the Region** Saratoga

Future

- ☐ Curated **site visits** with fund advisors
- ☐ Build connections to local, private and family foundations
- ☐ Align Board for **Introductions**

CREATE INTENTIONAL COMMUNICATIONS

- Clear, frequent, and inclusive messaging **(ongoing)** Our Why
- Celebrate impact of giving **(ongoing)** Awareness CF Value
- Align storytelling with key priority areas **(ongoing)** see collective change

Future

- ☐ *Raise the Region* / Albany
- ☐ Quarterly e-newsletter for fund advisors and professional adv.
- ☐ Leverage national **branding** campaign collateral – CF Value
- ☐ Expand marketing (Q4 proposal)
- ☐ Target HNW Charitably Inclined
- ☐ Create new donor profile **stories**

GROW FOUNDATION'S ENDOWMENTS

- Administrative (Judith N Lyons, etc.) and Discretionary (Community Impact); Non-discretionary (Scholarships, field of interest, & designated) **(ongoing)**

Future

- ☐ Refine our donor/fund holder lifecycle management (CRM)
- ☐ Target key audience outreach (PA, Families, Entrepreneurs...)
- ☐ Family Philanthropy Summit 25'
- ☐ Roadshow to PA community (CF top of mind for **referrals**)
- ☐ Campaign for Impact Part II

ELEVATE COMMUNITY

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CAPACITY BUILDING

- Strengthen nonprofits through tailored training; Leadership development; Equitable access to funding; Technical support and workshops (**ongoing**)
- ✓ **Simplified Applications; 7 virtual workshops; 18 TA sessions w/nonprofits**

Future

- ☐ Meet the Foundation(s) Event
- ☐ Resources for underserved – ABC – small business support
- ☐ **Catalysts** Leadership Program
- ☐ Nonprofit Toolkit Newsletter
- ☐ Workshops: finance, succession, business planning

CONVENE COMMUNITY PARTNERS

- Join and facilitate learning & planning meetings(**ongoing**) Funders/DSS, ARC, CEG, etc.
- Commission and share local data (**ongoing**) Rubin Research
- Influence public policy and advocacy strategies (**ongoing**) DAF Legislation

Future

- ☐ Quarterly **Funders** Convening
- ☐ Publish Kidney Disease Report
- ☐ Rubin Learning Community
- ☐ Establish Policy for Policy/Advocacy Work

COLLECTIVE CHANGE

- Support partners across sectors in collaborative initiatives (**ongoing**) C-NRG Hub, Comm of Excellence; CEG; Uncharitable; Kidder; etc.
- Lead & invest in priority areas:
 - Community Health Rubin Focus
 - Racial Equity and Social Justice ABC
 - Community Impact Fund (broadly responsive endowment by design)

Future

- ☐ C-NRG Hub, GHHI, *Ellis Island Initiative*, Workforce (ATEC) & Digital Equity (AI)
- ☐ Pilot new applications, rubrics, reporting / equity lens
- ☐ Collective Impact Projects

STRENGTHEN OUR CORE

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INCREASE CORE SYSTEM EFFICIENCIES

- ✓ Completed *Foundant* system conversion; fund accounting, GLM/SLM; new fund advisor portal; digitized fund statements and gift acknowledgements)
- Simplify our tech stack (**ongoing**)

Future

- ☐ Optimize CommunitySuite (CRM)
- ☐ Refine internal/external reporting (KRAs and KRMs) ROI, SROI
- ☐ 2023 Audit through new system
- ☐ Utilize Prime's **daily** valuations / App generation

IMPLEMENT W.I.D.E.

- ✓ Hosted Heather McGhee; Completed *The Sum of Us*
- Implement System-Wide DEI Goals for governance, grants, programs and operations (**ongoing**) Wellness

Future

- ☐ Staff Support: EAP; COF; Secure Acts 2.0 – 403B
- ☐ Ongoing Board Dev. = City
- ☐ Board Survey
- ☐ Refine applications, rubrics, reports with Equity Lens
- ☐ Engage in Inclusive Economic Dev. CEG/REDC, ABC
- ☐ Catalysts & ENLA

Platinum
Transparency
2024

Candid.



BUILD BUSINESS CONTINUITY

- ✓ Maintain **COF** Standards and *Candid Platinum Seal* (2024)
- Update & document key workflow procedures; Cross-training (**ongoing**) growing efficient frontier business model

Future

- ☐ **COF** Recertification 9/2024
- ☐ Update finance manuals, flowcharts & SOPs
- ☐ Onboarding and cross training
- ☐ Focused Growth & Capacity
- ☐ Assess value prop. & CF outcomes (grants, programs, donor satisfaction, etc.)



**capital region
clean energy
hub**

HOME RESIDENTIAL COMMERCIAL CLEAN ENERGY JOBS [TALK TO AN ADVISOR](#)

Helping the Capital Region become more energy efficient

Our Energy Advisors can help you navigate through the many opportunities that are now available to you as New York State transitions to an inclusive clean energy-powered economy

[TALK TO AN ADVISOR](#)

The Capital Region Clean Energy Hub is grateful for the support from the Community Foundation for the Greater Capital Region



NONPROFIT WORKSHOP SERIES



Maximize your efforts and strengthen your nonprofit with FREE virtual workshops.
Monthly meetings 9-10:30am




Albany
Columbia
Greene
Rensselaer
Saratoga
Schenectady



National Day of Racial Healing Virtual Event

THE SUM OF US

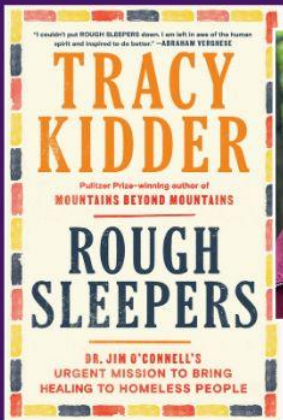
What Racism Costs Everyone and How We Can Prosper Together



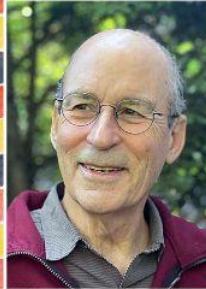
Hear from Heather McGhee,
New York Times best-selling author

**January 17, 2023
7 to 8 p.m.**

the COMMUNITY FOUNDATION THE COMMUNITY FOUNDATION COMMUNITY FOUNDATION COMMUNITY FOUNDATION



TRACY KIDDER
Pulitzer Prize-winning author of *MOUNTAINS BEYOND MOUNTAINS*
ROUGH SLEEPERS
DR. JIM O'CONNELL'S URGENT MISSION TO BRING HEALING TO HOMELESS PEOPLE




RAISE THE REGION

JOIN US!
Thursday, September 14, 2023
5:00 – 7:30 p.m.
Remarks 5:20 p.m.
Saratoga National Golf Club
Saratoga Springs, NY

OUR IMPACT

\$5.8 million
awarded in grants and scholarships

961

Local nonprofits and students

January 1, 2023 - September 30, 2023



Strengthening Capital Region Nonprofits

The Community Foundation offers tools and resources for professional development via virtual and in-person workshops and trainings around vital topics such as business planning, board governance and program evaluation. The sessions are provided at no charge to nonprofits. Current programs include:

Strategy Labs - Deep-dive, one-on-one workshops focused on a pre-identified issue area

Virtual Workshop Series - monthly sessions provide an opportunity to gather online to share best practices and learn from industry experts

Catalysts for Change Leadership Program

Now in its third year, the Catalysts for Change Leadership Program is a board development series focused on increasing inclusiveness and diversity on nonprofit boards. Upon completion of the program, participants have the opportunity to join a network of leaders looking to change the state of diversity on nonprofit boards.

2023 Catalyst Cohort PROGRAM IMPACT

Catalysts - Year 1

- 46% are actively serving on a nonprofit board
- 100% built upon their board governance and skills to navigate board and group dynamics
- 85% increased their knowledge of change management and skills related to DEI

Catalysts - Year 2

- 67% are actively serving on a non-profit board
- 47% advanced their career development, job changes, pursuit of full-time entrepreneurship with direct support

PAID ADVERTISING



Daquetta Jones (left) and Anzala Alozie, JD—leaders committed to building communities that celebrate diversity, equity and inclusion.



A Garden of Hope

THE COMMUNITY FOUNDATION for the GREATER CAPITAL REGION

2022-2023 Report

Insights

Copy to

Download



JOHN EBERLE

President & CEO
The Community Foundation for the
Greater Capital Region

WALTER THORNE

Market President & Publisher
Albany Business Review



Turning Assets into a Force for Good

Together we can make a powerful impact.

FOR PROFESSIONAL ADVISORS

As a professional advisor, you represent one of the most vital and dynamic groups of stakeholders that partner with the Community Foundation to strengthen our region through philanthropy. Whether your expertise is in wealth management, retirement, estate or tax planning, the Community Foundation is your experienced, local philanthropic partner.

By presenting philanthropy as an essential element of your practice, you're helping your clients invest their resources in ways that connect their passion with purpose. Whether their philanthropic interest is local or global, the Community Foundation can support their goals.

Our team supports both experienced and emerging advisors and donors. We offer a variety of resources, giving options, and individualized guidance to help you support your clients' charitable giving goals.

As your clients consider how to turn their success into significance, the Community Foundation works as your trusted philanthropic partner to help you maximize your clients' desired impact while also achieving beneficial tax outcomes.



"With one foot in
the private sector
and one foot in the

FOR INDIVIDUALS AND FAMILIES

From creating funds, corporations, and community foundations, we can create a lasting impact.

• **Endowment funds** - create a lasting impact

• **Donor Advised Funds (DAFs)** - allow individuals to make contributions using a variety of assets, suggest grants at their own pace, and when needed, donors can get ideas from the Community Foundation's team of experts.

• **Corporate Philanthropy** - allow businesses to support the community in which they are based.

• **Family and Private Foundations** - partnering with private and family foundations to provide administrative support, technical assistance, community expertise, and succession planning to amplify our shared impact.

• **Technical assistance** - provide administrative support, technical assistance, community expertise, and succession planning to amplify our shared impact.

• **Succession planning** - provide administrative support, technical assistance, community expertise, and succession planning to amplify our shared impact.

• **Community Foundations** - create a lasting impact

philanthropy amplified

From responsive grant programs to creative projects that address community needs, the Community Foundation manages nearly every kind of giving vehicle and tailors solutions to meet critical needs.

\$122M invested

in grants to nonprofits and scholarships to local students since our founding in 1968.

200+ engaged

with the Community Foundation's professional development tools and resources to benefit current and emerging nonprofit leaders in 2023.



Creating Impact Here

Working With the Community Foundation

Karen & Chet Opalka
work with the
Community Foundation
to amplify their
impact in the place
we call home.



Learn More!
Scan Here:



2 Tower Place, Albany, NY 12203
518-446-9638 | cfgcr.org



Executive Insights

... > Executive



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JOHN EBERLE
john@cfgcr.org

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PAID ADVERTISING

COMMUNITY FOUNDATION FOR THE GREATER CAPITAL REGION



ABOUT THE COMMUNITY FOUNDATION

The Community Foundation touches countless lives and works to understand and address the critical needs of those living throughout the Greater Capital Region. With over 50 years of experience, we have gained a unique perspective on how our Foundation can best serve as both steward of charitable giving resources and partner to our region's nonprofit organizations. Since our establishment in 1968, we have distributed more than \$122 million in grants to nonprofits and scholarships to local students. Today, more than 400 individuals, families and businesses have put their trust in the Community Foundation's ability to enable their philanthropy.

"The Foundation's in-depth knowledge of our local nonprofits and community needs provides a unique perspective to support impactful investment for families who are charitably inclined."
— Alicia D. Lasho, Chair, Board of Directors

Our Mission

The mission of the Community Foundation for the Greater Capital Region is to strengthen our community through philanthropy.

SERVICES FOR INDIVIDUALS AND FAMILIES

From creative projects that tackle critical social or policy issues to scholarship funds, corporate philanthropy, endowment funds, and donor advised funds, the Community Foundation manages nearly every kind of giving vehicle and tailors solutions to meet critical needs.



The Foundation can create a giving program just for you and help you fund effective organizations making a difference in the areas you care about - now and in the future.

• **Endowment Funds** - allow donors to champion the causes and communities they care about in perpetuity.

• **Donor Advised Funds (DAFs)** - allow individuals to make contributions using a variety of assets, suggest grants at their own pace, and when needed, donors can get ideas from the Community Foundation's team of experts.

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FOR MORE INFORMATION

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