

# Re-Commitment

**2019 - 2023 Strategic Plan**

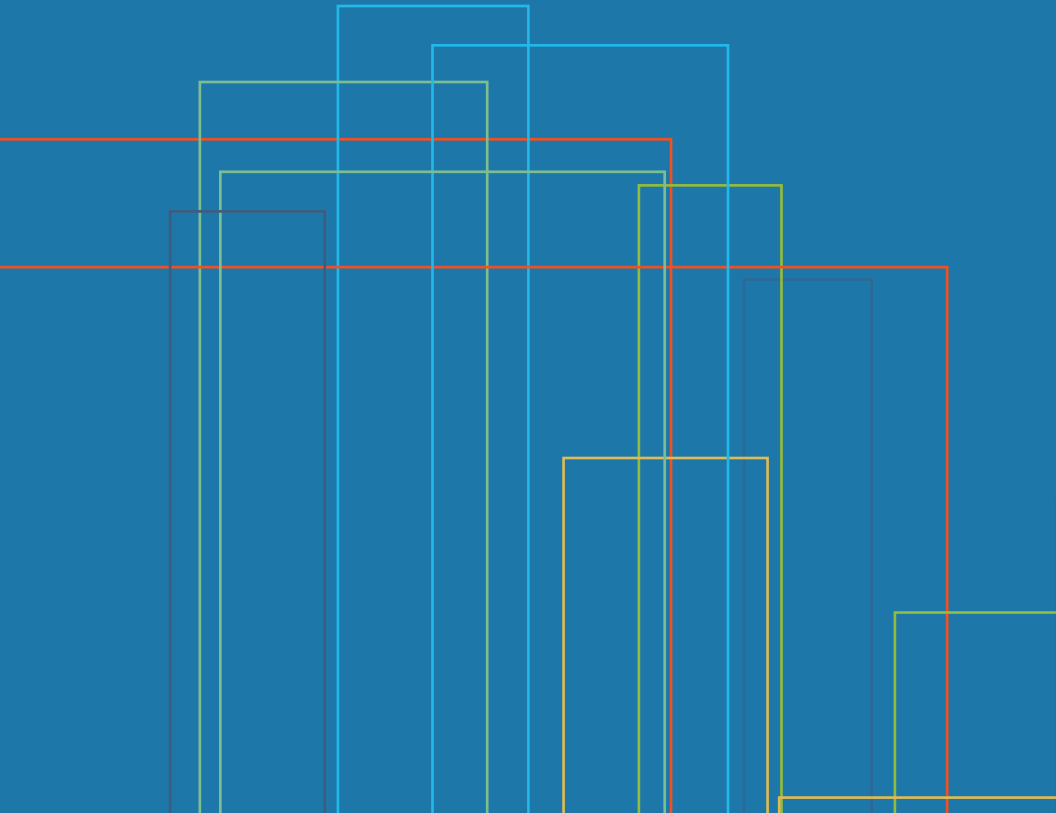


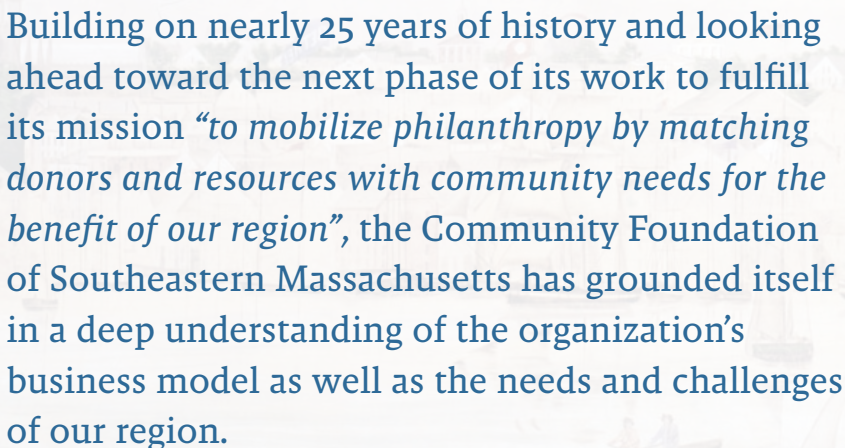
COMMUNITY FOUNDATION  
OF SOUTHEASTERN MASSACHUSETTS



## MISSION

To mobilize philanthropy  
by matching donors and  
resources with community  
needs for the benefit of  
our region.





Building on nearly 25 years of history and looking ahead toward the next phase of its work to fulfill its mission “*to mobilize philanthropy by matching donors and resources with community needs for the benefit of our region*”, the Community Foundation of Southeastern Massachusetts has grounded itself in a deep understanding of the organization’s business model as well as the needs and challenges of our region.

While there is much to learn from the practices and experiences of other community foundations, each one is unique, and the Community Foundation is obligated to pay attention to what makes this so and how we move forward from there.

An early marketing piece for the Foundation, created in response to the 1993 feasibility study that provided the argument and opportunity for this Foundation, captured it well in one of its headlines: *A Community Foundation Could Succeed*. It was then, and it remains now, to be all about potential. But as with that early rumination, it requires clarity, commitment and community.

Over the past three years the Foundation has sought to build on the successes of the previous two decades while acknowledging the challenges. It has been a time of re-alignment, re-invigoration, re-engagement and re-commitment to that initial idea. With this Plan, and over the next five years the Foundation will build upon that history and strive to create an entity that can truly fulfill that mission.



### **The Current Landscape**

The Community Foundation, while serving the forty-one communities of Southeastern Massachusetts, has focused its work in the South Coast, anchored by New Bedford and Fall River. Most of our assets are held in advised funds, established by donors from the Greater New Bedford region and thus the philanthropic focus of the Community Foundation has been New Bedford.

Not surprisingly, the philanthropic profile of the region reflects a high degree of need and non-profit saturation in the city of New Bedford followed by Fall River, Brockton and Plymouth while private philanthropic assets tend to accumulate in the suburban areas - especially Marion, Dartmouth, Westport, Mattapoisett and Mansfield. Corporate philanthropy tends to be dominated by banks and credit unions with other businesses reflecting a philanthropy that is highly localized in three distinct areas of the region: South Coast, Greater Attleboro/Taunton, and Great Plymouth County/Brockton.

The current business model of the Community Foundation is atypical of most community foundations as the revenue profile reflects a high dependence on annual fundraising, a limited Board-Designated Endowment, a preponderance of advised funds versus discretionary funds, a low number of grants made and gifts received per capita, and an historical reliance on fiscal sponsorships for asset gathering. The broadest regional engagement the Community Foundation has achieved is through scholarship work which draws donors and/or applicants from all but a few of the towns and cities in the region.

# The Work Ahead

In order to meet our mission and fulfill the obligations of the Community Foundation the strategic focus over the next five years will need to balance internal improvements with more robust and engaging external initiatives.

We will continue our commitment to be the philanthropic partner of choice for local donors and we will articulate and promote a clear vision of the impact we will have in servicing the needs of our communities.

BY 2023, WE WILL, →

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# 1. Build a Community Foundation that Can Serve the Needs of our Region

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From the Foundation's origins, it was clearly identified that its effectiveness will be predicated on the need to create and sustain capacity and expertise, through an endowment as well as organizational competency.

*Over the next five years, we will:*

## **Increase the Board-Designated Endowment Fund**

A limited Board-Designated Endowment Fund hampers the Foundation's ability to operate in a sustainable manner as well as be responsive and agile to community needs. By increasing this Endowment Fund and other key discretionary funds, the Foundation will establish a reliable stream of income for operations as well as resources that can be deployed with greater flexibility.



### **Gather Permanent Funds**

Agency Endowment, Donor Advised and Scholarship Funds all provide an opportunity to build our asset base and provide reliable, consistent revenue while serving the needs of local non-profits, donors and our community. Our role as the philanthropic partner for these entities will also provide the opportunity to collaborate with donors.

### **Build Flexibility**

In addition to earned revenue, we will continue to grow the Annual Fund and other traditional fundraising channels to maintain and broaden our organizational capacity, to serve as an entry point for potential fund donors, and to strengthen our ability to address community needs.

### **Work Smartly**

The Foundation will invest in improved technology to fulfill the challenges of this Plan. A more compelling, user-friendly and informative website with a donor/fund advisors portal is critical to our marketing efforts, donor/fund advisor engagement, and broader communication initiatives. A more reliable and flexible database will enhance our grant-and scholarship-making abilities while increasing internal productivity. A board portal will improve our communications with governance allowing for more effective engagement and robust voluntarism.



### **Embrace the Region**

Building on the work of the Creative Commonwealth Initiative, we will continue to seek out and create opportunities to support non-profits and attract donors beyond Greater New Bedford with particular focus on Fall River.



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## 2. Be an Effective Catalyst for Philanthropy

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The Community Foundation holds a unique role in the local community as it not only acts as a grant-maker, it is also, by definition, a public charity and is therefore not burdened or limited by variable individual or corporate interests and thus, can assume a very public posture on behalf of philanthropy.

Too often philanthropy in our community is characterized as being a limited or diminishing resource, while in truth, philanthropy is only limited by a lack of creativity and vision. The Community Foundation has the opportunity to not only collect and distribute assets, but to also serve the community by giving a voice to the need and impact of philanthropy, and to act in a variety of ways that will serve and build philanthropy.

*Over the next five years, we will:*

### **Increase External Profile**

The Foundation will increase awareness of our work and the role of philanthropy in our communities through increased and more effective marketing and communications initiatives as well as through targeted community leadership. The Board, President and key staff will be perceived of as reliable and thoughtful voices for philanthropy in the region.

### **Build Strategic Partnerships with Funders**

Utilizing the Foundation's local expertise and network, we will seek out and develop relationships with funders within and outside of the region whose work would benefit from such a partnership. This will provide local funders with an opportunity to strategically increase their impact, especially in the context of our focus areas, as well as funders outside of the region who would benefit from our local expertise, operations and grant-making capacity.

### **Expand Role as Convener of Philanthropy**

As the leader of the Greater New Bedford Funders Group and through other professional connections and networks, the Foundation will be the public face and voice on behalf of private philanthropy for the good of our region.



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### 3. Improve the Quality of Life in Our Region through Education, Arts and Culture and Economic Opportunity

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While the Foundation will always seek to serve the intention of our fund donors, there is an opportunity to excite philanthropy and make meaningful impact by focusing on strategic areas of need.

The areas identified as those with the greatest potential for impact and support will allow the Community Foundation to create initiatives, attract funding, and serve the region more effectively. These areas: education, arts and culture, and economic opportunity will be informed through the rigorous collection, analysis and dissemination of information and data to guide potential programmatic interventions. A key component of each of these issue areas will be the creation of internal expertise along with robust thought leaders and community engagement. In partnership with the Public Policy Center at UMass Dartmouth, we will create initiatives that are guided by reliable data, thoughtful interventions and deeply informed by local leadership through our ad hoc committees for each issue.

#### Education

It is the rare conversation regarding the improvement of our region that does not come back to the need to increase and improve education – particularly in New Bedford and Fall River. From early literacy to college scholarships to mid-career professional development, the need is extensive.



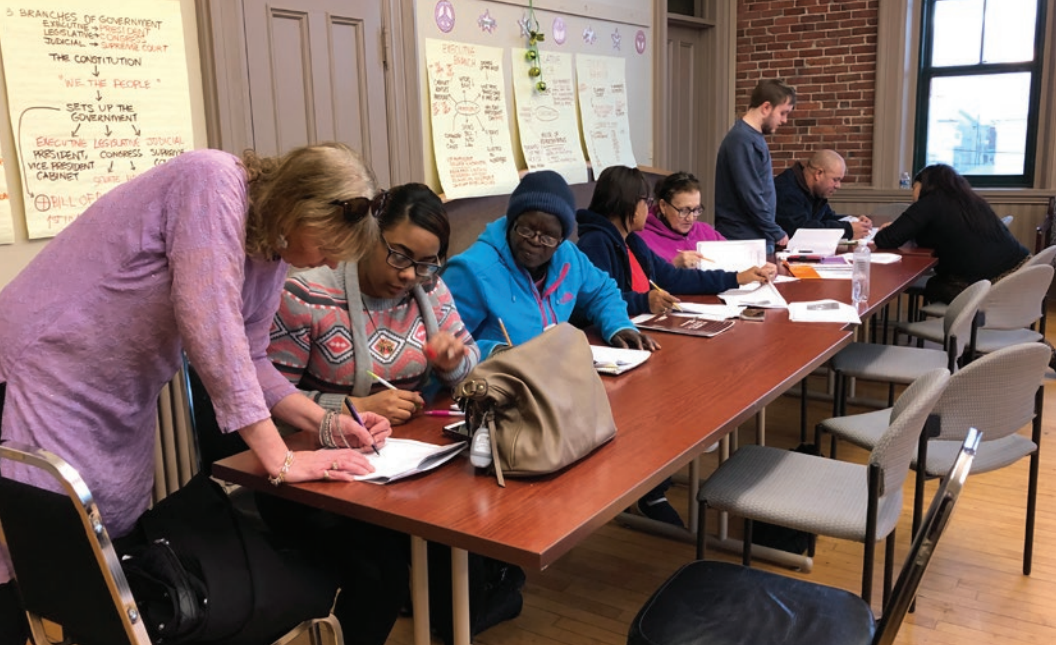
With our Scholarship Funds we have an opportunity to expand our impact beyond that first year of college and to truly see a significant impact with this investment. Additionally, the Community Foundation will find interventions that address the foundational needs for educational success from early literacy to social/emotional support programs for high schoolers. As with each of these issues, the work will be based on thoughtful analysis of data and information. Specifically, our work with the Public Policy Center will not only inform the work but create a baseline from which to orient new and expanded initiatives.

### **Arts and Culture**

Our Creative Commonwealth Initiative will continue to be the focus of this high-profile and robust area of opportunity. Building on the partnership with the Barr Foundation, we will attract and create local philanthropy that will augment that external investment. While the initial focus has been, in response to our community outreach, to target public art, capacity building for small non-profits, access for youth and the elevation of culturally diverse creativity for Fall River and New Bedford, there is much more opportunity beyond this start.







## Economic Opportunity

Dovetailing the other areas of focus, economic opportunity will capture our efforts toward removing obstacles and increasing success for our community members in the economic realm. This will include our work through the Women's Fund, immigration initiatives, and workforce development. Building on the work of our Polaroid Fund in partnership with the Boston Foundation, we will seek to deepen our understanding of our role in providing opportunity for our residents to thrive economically.

**As with all our work, this strategic planning process was deeply informed by our community, with guidance from our leadership, and expertise from our staff. We are very grateful to them for their efforts in creating *Re-commitment*.**

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