



Community
Foundation
of the
Dan River Region

August 24, 2023

Strategic Planning



What We Want to Accomplish Today

- Review Current Strategic Plan
- Look at Our Donors
- Look at Donor Feedback
- Determine the Biggest Community Needs
- Discuss How We Can Help
- Establish Next Steps

Four Big Ideas

1) Giving and Resources

- Increase education and awareness of the CFDRR
 - ✓ Creates more donors
 - ✓ Provides greater ability to address community needs

2) Capacity Building

- Stabilize staffing and identify additional support
 - ✓ Reduces turnover
 - ✓ Increases ability to handle outages and special projects

3) Community Leadership

- Identify community needs/gaps in services
 - ✓ Makes a difference beyond issues initiated by donors
 - ✓ Identifies where additional resources are required

4) New Programs

- Create new programs to address needs/gaps in services
 - ✓ Allows focused fundraising
 - ✓ Improves quality of life across the region

Increase Giving and Resources

- 1) Conduct a **focused marketing campaign** throughout the region

Results should be \$5M in new donations - defined as new donations of \$5k or more and increases in existing donations that are currently \$5K or more.

- 1) Target audience has been identified for campaign: top 15% of donors.
- 2) Contacting other Community Foundations (CF) to learn about their best practices for outreach yielded a few suggestions.
- 3) A marketing campaign will consist of going out and talking with target audience; the campaign has not been created, as we are in the process of identifying what we are going to promote. Additionally, dedicated personnel is needed for developing our marketing plan and creating marketing materials.
- 4) We actively engage with our primary partners on the donor side through Cannon Financial offerings to CPAs, lawyers and financial advisors; our annual report features a piece on the 1996 Legacy Society.

Build the capacity of the Foundation's staff and resources

- 1) Increase the Board Endowment Fund balance to \$1 million.
 - 2) Achieve 85% participation by current Board members in annual donations to the Board Endowment Fund.
 - 3) Work with Averett to identify internship opportunities within their existing program
 - 4) Average staff tenure to exceed five years.
 - Evaluate current benefit package.
 - Performance evaluations
 - Open, positive work environment
 - 5) Maintain list for emergency staffing needs
- 1) The current board, including new board members, are aware of this objective and the purpose of growing the Board Endowment to provide funds for the Foundation's operations, to lower fees and increase resources for grant making.
 - 2) Reasons that this is important are reiterated at quarterly board meetings. Current and former board members will receive an 'ask' letter before December 1.
 - 3) Met with AU's Center for Community Engagement & Career Competitiveness about their internships; received guidelines/contract. Contact point left Averett and follow-up discontinued. Current priority focus is on paid staffing.
 - 4) The PTO and benefit policy was evaluated in December 2022. Several changes were made to improve the package. Performance evaluation completed. Developed a well-written, comprehensive Employee Handbook.
 - 5) A few names have been shared by staff and Board. If an emergency arises, we may need to seek temporary help from a temp agency.

Provide leadership in charitable resources

- 1) Identify needs/gaps in services in our region and take actions to address these gaps.
- 1) We have identified education and literacy as the primary community needs.
- 2) We believe our donors will support investments in education.
- 3) We are aware of specific programs that are addressing needs in this area; we want to identify ways to partner. Locally, Go-Tec and Out-of-School-Time learning project are two potential partners.
- 4) A Hospitality Management and Tourism Scholarship was established by CFDRR to support students of all ages enrolling in local hospitality programs.

Maintain fiscal responsibility and integrity

1. Obtain clean audits annually.
 - 1) The audit activities are all in the process of being accomplished within this timeframe for FY2023.
- 2) Meet National Standards
 - 2) Reaccreditation has been approved for the next three years.
- 3) Evaluate investment consultant and policy annually.
 - 3) Evaluation completed annually by the Finance Committee.

Build resources and impact in secondary service areas

- 1) Increase the Fund for Halifax County's assets to \$250,000.
- 1) The Advisory Committee was rebuilt during the summer of 2023. The new members will help promote growth of the Fund for Halifax County. A Plan of Action with suggestions for each of the activities was written.
- 2) Start five new funds in Halifax County.
- 2) One new scholarship established. First award made in 2023. Some outreach ideas are captured in the Plan of Action.

Maintain a diverse Board

- 1) Recruit Board members to reflect the region's demographics.
 - 2) Maintain Board occupational diversity while ensuring adequate financial and accounting expertise
- 1) Current Board reflects the demographics of the Dan River Region.
 - 2) Current Board has accounting and financial expertise as well as a diverse mixture of occupations, residences, backgrounds and interests.

Grow Grantmaking Strategies

- 1) Increase unrestricted funding by @250k/year in new donations.
- 1) 27th Year Quality of Life Annual Appeal suggests donations to the Unrestricted Community Fund. Undesignated gifts to The Foundation are now split between the Board Endowment Fund (30%) and the Unrestricted Community Fund (70%).

Provide a clear Vision and Strategy

- 1) Establish and maintain a Mission and Vision for the Foundation
 - Review and update annually
 - Major reviews every five years
 - 2) Establish and maintain a Strategic Plan with clear, measurable goals, responsible parties, actions required to achieve those goals, a budget and timeframe.
- 1) Continuing to update materials with new Mission, Vision & Values.
 - 2) 2023-2027 Strategic Plan approved by CFDRR Board of Directors 12/12/2022 .

Our Vision

The Dan River Region will be known for the overwhelming generosity of its communities and dedication to improving quality of life, providing support for those in need, and creating life-changing opportunities.

Our Mission

The Community Foundation of the Dan River Region will improve and enrich the lives of the region's residents by encouraging and facilitating donations; by managing, investing, and distributing these donations in accordance with donor's wishes while meeting community needs; and by ensuring these donations create a lasting legacy of growth and opportunity throughout the region.

Our Values

The Community Foundation of the Dan River Region believes in:

- Trustworthy and transparent activities
- Efficient and effective internal operations
- Strong relationships within the region's communities
- Shared and celebrated stories of success from across the region

Make a Difference. Change a Life. Leave a Legacy.

The Community Foundation of the Dan River Region was established to improve and enrich area lives through the generosity of donors.

[Learn More](#)



Excellence. Accountability. Impact.™

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4) New Programs

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 - ✓ Improves quality of life across the region

Who Are The Key Donors?

These ten people:

| Year | Total Contributions | |
|-------|---------------------|---|
| 21-22 | \$2,432,951 | Approximately 81% of all contributions were received from ten donors for the year ended June 30, 2022. |
| 20-21 | \$1,165,536 | Approximately 80% of all contributions were received from eleven donors for the year ended June 30, 2021. |
| 19-20 | \$3,167,427 | Approximately 73% of all contributions were received from six donors for the year ended June 30, 2020. |
| 18-19 | \$893,160 | Approximately 66% of all contributions were received from ten donors for the year ended June 30, 2019. |

Who Are We Really Talking About ?

Top 80% of Donations 2021-2022

10 Unique Donors

- 5 Individuals
- 3 Foundations/Organizations/Trusts
- 2 Estates

Top 95% of Donations 2021-2022

39 Unique Donors

- 26 individuals
- 11 Foundations/Organizations/Trusts
- 2 Estates

Who Are We Really Talking About ?

Top 95% of Donations 2021-2022

Sources for the 95%

| | |
|------------------------------------|-------------|
| Estates - | \$1,178,517 |
| People - | \$ 645,955 |
| Foundations/Organizations/Trusts - | \$ 494,410 |

Type of Funds for the 95%

| | |
|--|-------------|
| Unrestricted - | \$1,193,020 |
| Designated/Donor Advised/Field of Interest - | \$ 908,369 |
| Scholarships - | \$ 137,398 |

How Does This Impact Our Original Ideas?

Things that don't matter as much as we thought they did:

- Making sure everyone knows who we are
- Increasing the number of individual donors

Things that matter a whole lot:

- Making sure the right people know who we are
- Making sure we pick new initiatives that will draw support

What Do Our Donors Tell Us?

Attendees at the 2022 Donor Appreciation Luncheon were asked to write one thing that they saw as a community need that they thought should be addressed or supported.

60% of the responses dealt with education.

What Do Our Donors Tell Us?

Responses included the following:

- Ten responses simply stated education
- Improve the educational system
- Early childhood literacy
- Improve the education of young children
- Programs for pre-k and elementary grade children
- What can we do to have our city schools become certified (accredited)?
- Shoulder services for public schools (after-school tutoring, mental health, etc.)
- Secondary education, tutoring for example
- Work to lift the communal expectations of our students- we expect success

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What Are Our Community Needs?



ALICE is an acronym for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed, and represents the growing number of families who are unable to afford the basics of housing, child care, food, transportation, health care, and technology. These workers often struggle to keep their own households from financial ruin, while keeping our local communities running.

What Are Our Community Needs?

ALICE data for the City of Danville:

2021 Point-in-Time-Data

Population: 42,556 **Number of Households:** 18,590 (2% change from 2019)

Median Household Income: \$38,904 (state average: \$80,963)

Labor Force Participation Rate: 53% (state average: 65%)

ALICE Households: 29% (state average 28%) **Households in Poverty:** 23% (state average 10%)

52% of households are below the ALICE threshold or in poverty.

What Are Our Community Needs?

ALICE data for Pittsylvania County:

2021 Point-in-Time-Data

Population: 60,833 **Number of Households:** 24,663 (-6% change from 2019)

Median Household Income: \$49,486 (state average: \$80,963)

Labor Force Participation Rate: 55% (state average: 65%)

ALICE Households: 31% (state average 28%) **Households in Poverty:** 17% (state average 10%)

48% of households are below the ALICE threshold or in poverty.

What is the Challenge?

How do we reduce the number of people living in poverty?

How do we move working people from below the ALICE threshold to above the threshold?

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How Do We Align Community Needs with Donor's Interest and Support?

Improved educational outcomes

Increased Workforce participation

Preparation for higher paying jobs

Improved educational outcomes

Help establish and support community-based reading/literacy programs that focus on disadvantaged students.

Danville Public Schools Reading SOL Pass Rates for Disadvantaged Students

| | | <u>20-21</u> | <u>21-22</u> |
|--------------|-------|--------------|--------------|
| Elementary 1 | K - 5 | 35 | 43 |
| Elementary 2 | K - 5 | 43 | 56 |
| Elementary 3 | K - 5 | 26 | 38 |
| Elementary 4 | K - 5 | 29 | 42 |
| Elementary 5 | K - 5 | 33 | 48 |
| Elementary 6 | K - 5 | 42 | 35 |

Danville Public Schools Reading SOL Pass Rates for Disadvantaged Students

| | | <u>20-21</u> | <u>21-22</u> |
|----------|--------|--------------|--------------|
| Middle 1 | 6 - 8 | 40 | 39 |
| Middle 2 | 6 - 8 | 36 | 44 |
| High 1 | 9 - 12 | 96 | 92 |
| High 2 | 9 - 12 | 50 | 62 |

Pittsylvania County Public Schools

Reading SOL Pass Rates for Disadvantaged Students

| | | <u>20-21</u> | <u>21-22</u> |
|--------------|-------|--------------|--------------|
| Elementary 1 | K - 5 | 56 | 57 |
| Elementary 2 | K - 5 | 64 | 63 |
| Elementary 3 | K - 5 | 79 | 77 |
| Elementary 4 | K - 5 | 72 | 80 |
| Elementary 5 | K - 5 | 65 | 75 |

Pittsylvania County Public Schools

Reading SOL Pass Rates for Disadvantaged Students

| | | <u>20-21</u> | <u>21-22</u> |
|---------------|-------|--------------|--------------|
| Elementary 6 | K - 5 | 66 | 73 |
| Elementary 7 | K - 5 | 74 | 86 |
| Elementary 8 | K - 5 | 81 | 82 |
| Elementary 9 | K - 5 | 75 | 75 |
| Elementary 10 | K - 5 | 67 | 89 |

Pittsylvania County Public Schools Reading SOL Pass Rates for Disadvantaged Students

| | | <u>20-21</u> | <u>21-22</u> |
|----------|-------|--------------|--------------|
| Middle 1 | 6 - 8 | 69 | 62 |
| Middle 2 | 6 - 8 | 74 | 77 |
| Middle 3 | 6 - 8 | 68 | 63 |
| Middle 4 | 6 - 8 | 77 | 76 |

Pittsylvania County Public Schools Reading SOL Pass Rates for Disadvantaged Students

| | | <u>20-21</u> | <u>21-22</u> |
|--------|--------|--------------|--------------|
| High 1 | 9 - 12 | 82 | 88 |
| High 2 | 9 - 12 | 77 | 82 |
| High 3 | 9 - 12 | 63 | 71 |
| High 4 | 9 - 12 | 81 | 91 |

Improved Educational Outcomes

Help establish and support community-based reading/literacy programs that focus on disadvantaged students.

- ✓ Work with DRF on after-school and summer educational initiatives
- ✓ Work with existing non-profits, churches, civic groups, neighborhood organizations

Increased Workforce Participation

Provide support for programs that expose students to occupational options and opportunities at an early age.

- ✓ Activ8 STEM Academy – DPS
- ✓ Go-Tec and Out-of-School-Time
- ✓ Introduction to Technician and Tradesman occupations

Preparation for higher paying jobs

The Foundation has a long history of providing scholarship support for individuals attending universities and colleges.

The Foundation should establish additional scholarships and other financial support for individuals who want to attend schools for technical or trade occupations where traditional scholarship support does not currently exist.

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Capacity Building

The current staff at the Foundation are able to manage the essentials right now.

Barely.

In order to execute the initiatives outlined in the Strategic Plan (marketing, asset growth, expanded scholarship and program activities, etc.) we are going to have to increase staffing.

Next Steps – Things to Do

1) What Can We Realistically Impact?

- Find programs that will really move the needle
 - Will they leave the region demonstratively better off?
 - Can our support make a difference in this area?

Next Steps – Things to Do

2) Who Can We Partner With?

- Identify who can/should/does provide these services
 - Do they currently have funding for this?
 - Do we currently have a fund that supports this?
 - What additional funding is required?

Next Steps – Things to Do

3) What New Programs Will We Support Through Marketing and Fundraising?

- Identify new programs that:
 - Meet a significant need
 - Have the support of our donors
 - Can be implemented by a new or existing partner
 - Need our financial support to succeed

Who is interested in looking into the following areas?

Improved educational outcomes

Increased Workforce participation

Preparation for higher paying jobs