



# Strategic Plan 2017-2019

## **Mission Statement**

We are a unique and innovative family foundation striving to help meet the needs of the greater Grinnell community through ongoing support services and resources by maintaining and perpetuating an endowment. Our purpose is to provide improved and enhanced quality of life for present and future generations with interest in the areas of parks and recreation, education, and health with our collaborative partners.

## **Vision**

To enhance the quality of life for future generations in the Grinnell community and its neighboring communities.

## **Core Values**

The Claude W. and Dolly Ahrens Foundation is guided by six interdependent values: Collaboration, Compassion, Innovation, Integrity, Respect, and Wellness

## **Code of Ethical Principles:**

### **Governance**

1. We have a governing board that establishes the mission, guides the operations, oversees the effectiveness and ensures the ethical conduct of the foundation.
2. Authority is vested in the governing board as a whole, and each member is equipped to advance the foundation's mission.
3. We consider multiple strategies to further our mission.
4. Our governing board exercises active fiscal oversight.

### **Accountability**

1. We recognize and act upon our obligations to multiple stakeholders: the donor's family, grantees and grantseekers, the public and governmental bodies, and to our community.
2. We respect our nonprofit partners' missions and expertise and strive for relationships based on candor, understanding and fairness.
3. We welcome public interest and communicate openly.

### **Family Legacy**

1. Our governing board respects donor intent and later generations' interests while also considering the demands of a changing world.
2. We plan for leadership continuity.



# Strategic Plan Goals

The Claude W. and Dolly Ahrens Foundation has identified the following four goals – one each in the areas of governance, funding focus, charitable programs, and communications – as key to achieving its mission.

## Governance

**Goal Statement One:** We will be proactive in our fiscal oversight by conducting ongoing self-regulation practices, adhering to ethical standards and legal compliance, and we will ensure spending levels are sustainable and consistent with our objective to exist in perpetuity.

*Strategies:*

- a. *We will refer to peer benchmarking and comparative data for setting policy, administering grantmaking activities and charitable programs, and implementing staff compensation and benefits packages.*
- b. *We will refer to outside legal counsel and consultants who are considered experts in the industry, when necessary.*
- c. *Model our accountability self-regulation practices after the Iowa Principles & Practices for Charitable Nonprofit Excellence.*
- d. *Remain active members of state and national affinity organizations:  
1) Iowa Council of Foundations; 2) Council on Foundations; and 3) Exponent Philanthropy.*
- e. *Conduct an annual financial auditing and/or review process with independent auditors.*

**Goal Statement Two:** Our board and staff will work together to continue a strong and healthy relationship and plan for succession.

*Strategies:*

- a. *Board and staff will actively participate in ongoing professional development by attending peer workshops and/or conferences pertaining to nonprofits and foundations.*
- b. *Board and staff will participate in ongoing retreats for future strategic planning.*
- c. *Succession planning for board and staff will be implemented and preparation of transitioning in the next generation of family members will assure continuity of governance.*

# Funding Focus

**Goal Statement One:** We have a specific parks & recreation, education, and health & welfare focus for the local community relating to the community's needs at the foundation's discretion.

*Strategies:*

- a. *We are the primary funding source for the Ahrens Park Foundation and Ahrens Paschall/Memorial Park, located in Grinnell, IA. We are dedicated to providing this ongoing gift to the community.*
- b. *We are dedicated to working with the City of Grinnell, Greater Poweshiek Community Foundation, Grinnell College, Grinnell Community Daycare & Preschool, Grinnell-Newburg Schools, Grinnell Regional Medical Center, and other local philanthropic partners to help identify needs for funding for the local community.*

**Goal Statement Two:** Socially Responsible Investing within the Grinnell community.

*Strategies:*

- a. *We will continue holding investments with the Strand Theatre, LLC and engage as a managing partner.*
- b. *We will continue holding investments with West Broad Investments, LLC.*
- c. *We will continue to be open to taking part in additional community social investments.*

# Charitable Programs

**Goal Statement One:** We will evolve and strengthen our Community Support Services program.

*Strategies:*

- a. *Promote community collaborations and partnerships that will enrich and advance our community between nonprofits, community projects, and local governments.*
- b. *Create efficiencies and provide shared staff and administrative services for the Greater Poweshiek Community Foundation and its agency organizations.*
- c. *Be our community's leader by providing expertise and advice for other community nonprofits, organizations, and philanthropic partners.*

**Goal Statement Two:** We will maintain our Dolly Ahrens Achievement Scholarship program, Leave It Better Than You Found It award program, and Lend a Hand program.

*Strategies:*

- a. *We will award a minimum of ten scholarships each year to graduating seniors of Grinnell High School through the Dolly Ahrens Achievement Scholarship program.*
- b. *We will raise awareness and responsibility amongst the broader community to support and give back to local nonprofits and community projects in regards to the Leave It Better Than You Found It and Lend A Hand programs.*
- c. *We will engage board and staff in volunteer activities to assist local nonprofits and community projects for the Lend A Hand program.*

**Goal Statement Three:** We will explore and strive to implement new charitable programs that will benefit the local community.

*Strategies:*

- a. *Create a mini-grant program to benefit local non-profit organizations and projects as well as to complement other established community mini-grant programs provided by local funders.*
- b. *Explore current needs of the local community and respond by creating new programs and/or collaborating with other established programs in the community to help meet those specific needs.*

# Communications

**Goal Statement One:** We will implement our marketing plan to maintain external communications for continued public relations and awareness of our mission.

*Strategies:*

- a. Continue to identify target audiences to spread public awareness of our mission, funding focus, charitable programs, and collaborative charitable partners.*
- b. Maintain use of our marketing techniques: 1) print materials; 2) website; 3) social media; 4) press releases; 5) promotional video; 6) e-newsletters; and 7) published books.*
- c. Create and implement evaluation strategies through community and peer assessments.*

