

ST. CROIX VALLEY FOUNDATION

STRATEGIC ACTION PLAN

2023-2028



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Letter from Leadership

It's been more than a decade since the last time St. Croix Valley Foundation (SCVF) charted a course for future growth and impact through a comprehensive strategic planning process. Since then, our assets have more than doubled, we've increased annual grants and scholarships by \$3.5 million, and the communities throughout our region have continued to grow and change. As we approached \$100 million in assets, our board and staff agreed that it was time to engage stakeholders in the creation of a new strategic plan.

We began the strategic planning process in mid-2022, reaching out to community members, nonprofit partners, donors, volunteers, and staff, asking "What if?" What if we could significantly grow long-term assets that would enable us to forever respond to local needs more nimbly and flexibly? What if we aligned goals and strategies with our affiliates, coordinating both asset development and grantmaking across the region? What if we positioned ourselves for exponential growth and impact?

In short, we imagined what could be possible for the St. Croix Valley and what our role might be in that transformative change.

What follows is our new strategic plan, grounded in the history of SCVF and the important partnerships we've developed in the 29 years since our founding – with a fresh perspective about how we might best work for the long-term benefit of the St. Croix Valley. We launch this strategic plan with excitement and the belief that we are stronger together. SCVF is well-positioned to lift up philanthropy throughout our region, with a focus on legacy gifts that will significantly impact the communities we serve - now and forever.



Jim Ellis
Board Chair



Heather Logelin
President & CEO

2024 BOARD OF DIRECTORS

JIM ELLIS, ANN HERZOG DREWISKE, DENNIS DUERST, GREG BERNARD, RICK BONLENDER, MICHELLE BREDAHL, DAVE DZIUK, JESSICA EHRLICHMANN, JUDY FREUND, DAN HOOLIHAN, GARY KELSEY, MELANIE KLEISS, KATRINA LARSEN, LINDA MADSEN, BUCK MALICK, MARSHA SHOTLEY, MICHEL TIGAN

Mission and Values

Mission

To enhance the quality of life in the St. Croix Valley.

Values

TRUST

We value the trust our partners place in us to manage philanthropic assets with accountability and confidentiality, to engage them in meaningful ways, and to assess and respond to the needs of the St. Croix Valley.

COMMUNITY

We ground our work in the deep sense of connection people have for the St. Croix Valley, a region of unique communities united by shared values and experiences.

COLLABORATION

We bring people together to build relationships, increase knowledge, and create positive change.

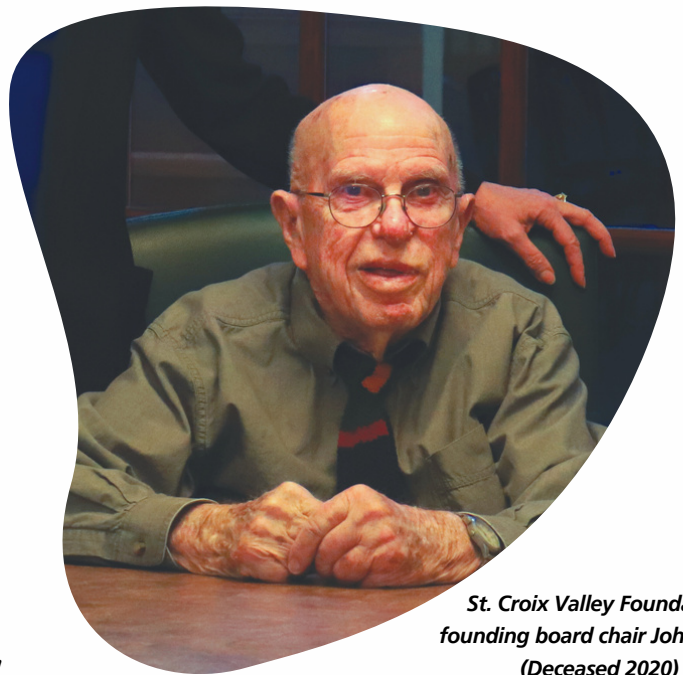
We welcome diverse perspectives and experiences, working towards equity in all that we do.

GENEROSITY

We support those wanting to give back to the community - today, tomorrow, and forever.

IMPACT

We strive to ensure that our work - supporting donors, facilitating impactful grants, and providing community leadership - truly improves the quality of life in the Valley.



*St. Croix Valley Foundation
founding board chair John Baird.
(Deceased 2020)*

Major Goals

Goal 1

SCVF LEVERAGES ITS RELATIONSHIPS WITH DONORS TO SIGNIFICANTLY GROW LONG-TERM UNRESTRICTED AND FIELD OF INTEREST FUNDS

Goal 2


SCVF LEVERAGES ITS COMPETITIVE GRANTMAKING, NONPROFIT ENGAGEMENT, AND OTHER PARTNERSHIPS TO AMPLIFY ITS IMPACT

Goal 3

SCVF'S AFFILIATES ARE A VITAL PART OF BUILDING LONG-TERM PHILANTHROPIC ASSETS AND DEPLOYING EFFECTIVE GRANTS ACROSS THE REGION

Goal 4

OPERATE FROM A MORE EFFICIENT BUSINESS MODEL THAT POSITIONS THE SCVF FOR INCREASED GROWTH AND IMPACT



The Valley Music Education endowed fund fuels music education programming for schools throughout the region.

Goal 1

SCVF LEVERAGES ITS RELATIONSHIPS WITH DONORS TO SIGNIFICANTLY GROW LONG-TERM UNRESTRICTED AND FIELD OF INTEREST FUNDS

Strategies

- Prioritize professional advisors as our primary pathway to prospective legacy donors.
- Prioritize legacy donor outreach and engagement, focusing on meaningful one-on-one connections.
- Strengthen collaborations with nonprofit partners to promote and support legacy giving.
- Broadly communicate the impact of legacy giving with a focus on endowed flexible (unrestricted and field of interest) gifts.

Success Measures

- Charitably-minded individuals and professional advisors know and engage with SCVF, especially for legacy giving, gifts of non-cash assets, and enhanced impact for their personal philanthropy.
- Professional advisors see SCVF adding value to lifetime and legacy giving for charitable clients and as a resource for their practice.
- Throughout the Valley, nonprofit organizations promote and encourage legacy giving; donors are excited about creating a lasting impact through legacy gifts.



Goal 2

SCVF LEVERAGES ITS COMPETITIVE GRANTMAKING, NONPROFIT ENGAGEMENT, AND OTHER PARTNERSHIPS TO AMPLIFY ITS IMPACT

Strategies

- Strengthen relationships with partners throughout the Valley to identify and respond to community needs.
- Facilitate convenings that raise awareness of community needs and present opportunities to partner with the SCVF and/or other community partners on a response.
- Align nonprofit capacity building with the needs of the sector, other resources, and unique capabilities of the SCVF.

Success Measures

- SCVF's discretionary and "influenced" grantmaking resources are significantly increased, drawing on discretionary, donor-engaged, and collaborative resources.
- Nonprofits see SCVF as a vital partner for grant support, a place to establish and grow endowed funds, a capacity-building resource, and for leadership with a regional perspective.
- SCVF is a node of connection for ambitious, visionary partnerships with other funders, private and corporate foundations, community leaders, and local nonprofits.



These activities were funded by SCVF competitive grant programs or supported by agency funds.

Goal 3

SCVF'S AFFILIATES ARE A VITAL PART OF BUILDING LONG-TERM PHILANTHROPIC ASSETS AND DEPLOYING EFFECTIVE GRANTS ACROSS THE REGION

Strategies

- Develop and implement a sustainable affiliate model.
- Move the SCVF and its affiliates from “us and them” to “we.”

Success Measures

- SCVF's affiliate relationships support its strategic and operational goals.
- SCVF and its affiliates are working together to raise endowment funds to forever support communities and to grant more dollars in response to current needs. “The whole is greater than the sum of its parts.”
- SCVF and its affiliates share a clear understanding of purpose and operate from a transparent mutual value proposition.
- SCVF and its affiliates share a brand that is well-known throughout the region.



Goal 4

OPERATE FROM A MORE EFFICIENT BUSINESS MODEL THAT POSITIONS THE SCVF FOR INCREASED GROWTH AND IMPACT

Strategies

- Develop more robust financial planning and reporting systems.
- Align fund offerings and related fees with strategic priorities.
- Review and, if needed, redefine service area for maximum growth and impact.
- Increase staff to support desired outcomes (vs. staff to budget).
- Improve board recruitment and training to build a more engaged, connected, representative board.
- Bring a Diversity, Equity, and Inclusion (DEI) lens to everything we do.

Success Measures

- SCVF's business model sustains its business operations and staffing needs and enables targeted investments in capacity and infrastructure.
- SCVF only supports transactional relationships that are closely aligned with its mission, vision, and capacity.
- SCVF board members have an increased range of skills and community connections.

SCVF STAFF

CARRIE BERDAN - ADMINISTRATIVE ASSISTANT

KATIE CLYMER - ACCOUNTANT

SALLY HERMANN - GRANTS MANAGEMENT AND DONOR SERVICES ASSOCIATE

HEIDI HERRON - GRANTS AND SCHOLARSHIPS OFFICER

HEATHER LOGELIN - PRESIDENT AND CEO

EMILY LOWNSBURY - DIRECTOR OF FINANCE AND OPERATIONS

ANGIE PILGRIM - DIRECTOR OF COMMUNITY IMPACT

ALAUNA YUST - MARKETING COMMUNICATIONS MANAGER

**ST. CROIX VALLEY
FOUNDATION
SERVICE AREA**



- AMERY AREA**
COMMUNITY FOUNDATION
- CHISAGO LAKES AREA**
COMMUNITY FOUNDATION
- HUDSON**
COMMUNITY FOUNDATION
- LOWER ST. CROIX VALLEY**
COMMUNITY FOUNDATION
- NEW RICHMOND AREA**
COMMUNITY FOUNDATION
- NORTHWEST ALLIANCE**
COMMUNITY FOUNDATION
- PRESCOTT** FOUNDATION
- RIVER FALLS**
COMMUNITY FOUNDATION
- SOMERSET**
COMMUNITY FOUNDATION
- STILLWATER AREA**
COMMUNITY FOUNDATION



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