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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.
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.
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.
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.

We work with donors like Jim and Judy Freund to help establish legacies supporting the causes they care about most.
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