



The Association of
Baltimore Area
Grantmakers

Informing Grantmakers, Improving Our Community

Strategic Plan 2015 - 2020

ABAG Board of Directors
Facilitated by Quinn Consulting
June 10, 2015

Acknowledgements

The Association of Baltimore Area Grantmakers is grateful to the Strategic Planning Advisory Group, Board Members and Staff for their time and leadership in developing this important document guiding our work through 2020.

Officers of the Board

Chair, Laurie Latuda Kinkel, Goldseker Foundation

Vice Chair, Cathy Brill, Stulman Foundation

Treasurer, Vernon H.C. Wright, Wright Family Foundation

Secretary, Diane Bell-McKoy, Associated Black Charities

Strategic Planning Advisory Committee

John Cammack, Cammack Family Charitable Gift Fund, ABAG Board Member

Sheldon Caplis, OneMain Financial

Stuart Clarke, Town Creek Foundation, ABAG Board member

Lara A. Hall, Blaustein Philanthropic Group, ABAG Board Member

Beth Harber, Abell Foundation, ABAG Board Member

Olga Maltseva, Warnock Foundation

Franklin N. McNeil, Jr., PNC Bank, ABAG Board Member

Kevin Griffin Moreno, Baltimore Community Foundation, ABAG Board Member

Tim O'Neill, William J. & Dorothy K. O'Neill Foundation, ABAG Board Member

Barry I. Schloss, Weinberg Foundation, ABAG Board Member

Kelly Herget Spilman, Herget Family Foundation, ABAG Board Member

Patti Sterling, France-Merrick Foundation, ABAG Board Member

Carrie Stockwell, Constellation, ABAG Board Member

Nonet Sykes, Annie E. Casey Foundation, ABAG Board Member

Stacey Ullrich, UnderArmour, ABAG Board Member

Nicolette Highsmith Vernick, The Horizon Foundation

Stacey VanHorn, TRowe Price Foundation, ABAG Board Member

Julie Wagner, CareFirst BlueCross BlueShield, ABAG Board Member

Core Staff

Celeste Amato, President

Buffy Beaudoin-Schwartz, Communications Director

Adam Donaldson, Member Services Director

Elisabeth Hyleck, Programs and Special Initiatives Director

Elyse Robinson, Office Administrator

Kim Snipes, Information and Operations Manager

**Association of Baltimore Area Grantmakers
Strategic Plan 2015-2020**

Mission Statement

The Association of Baltimore Area Grantmakers maximizes the impact of giving on community life through a growing network of diverse, informed and effective philanthropists.

Vision

Philanthropy in Maryland will be an integral force in tackling the region's most pressing problems through partnership with government, business and nonprofit decision-makers. The Association will be a catalyst for those partnerships by growing leaders in the philanthropic community; engaging diverse and emerging groups in philanthropy; cultivating a new generation of trustees, donors, and professional staff; and encouraging efficient and ethical philanthropic practices.

Core Operating Values

The following core values influence the culture and public image of the Association as an effective and connected organization in Maryland.

- **Generosity:** We believe generosity is essential to communal welfare and something everyone should practice in some form.
- **Inclusive and Respectful:** We value the perspectives and contributions of all people, and incorporate the viewpoints of diverse communities in our work.
- **Diversity:** We are committed to supporting a funding community that encompasses differences in the attributes of both individuals (such as race, ethnicity, age, socio-economic status, gender, physical ability, sexual orientation, and religion) and organizations (philanthropists, foundations and giving programs of differing sizes, missions, geographic locations, and approaches to grantmaking).
- **Welcoming:** We create an open, compassionate and trusting environment that facilitates learning, dialogue and healthy debate to inform and strengthen philanthropy.
- **Forward-Thinking:** We seek strategic opportunities to meet new and existing needs in innovative ways.
- **Forthright Stewards:** We conduct our business with honesty and integrity, utilize best practices in the stewardship of our resources and are accountable for our results.

**Leading for Transformation
Strategic Plan 2015 - 2020**

The Changing Landscape of Philanthropy

The demographics of American communities are changing. The population is aging, and in many communities, ethnic diversity is rapidly increasing. People of color are expected to become the majority in the United States by 2043, when the white population will likely dip below 50 percent.

Amid these changes, the traditional face of philanthropy — white, male, and older — will almost inevitably give way, with a far more diverse group poised to take up the mantle of community change.

At the same time, two large bulges in the population — millennials and baby boomers — are reaching their next phase of life: boomers are reaching retirement, and the millennials are moving into the workforce. Both transitions present important opportunities for donor associations to engage new members and partners but it may require changes in how funders think about and work with these groups.

Monitor Institute, Shift Happens: Understanding How the World is Changing. June 2014.

A Strong Foundation for Greater Impact

Since 1983 the Association of Baltimore Area Grantmakers has supported philanthropy and brought together a diverse group of funders with the shared goal of strengthening communities and improving quality of life across Maryland.

The Association serves as the resource, the network and the voice for philanthropy in Maryland. Our approach is rooted in the fundamental belief that philanthropy will have its greatest impact when diverse donors come together in a strong, supportive network that elevates best practices, raises their collective voice and increases opportunities for alignment and collaboration in pursuit of improved community conditions.

Our day to day work - facilitating peer connections, funder affinity groups and issue focused programming, and aligned and collaborative grantmaking -- all multiply the effect of individual giving. Over the Association's history we have also evolved into a space where ideas and initiatives emerging from the aspirations and interests of our members can be implemented through special initiatives and projects; and where partnerships can be forged to influence public policy, promote collective action and create lasting solutions.

Funders become members of our Association to be informed and connected, and because they seek the collaborative opportunities that will leverage their individual grantmaking for lasting change in the communities they serve. Our members are tackling some of the most intractable issues facing Maryland communities and realize that as a philanthropic community we must lead these conversations, we must engage our grantees and partners in new ways AND that to improve community conditions we must challenge the way we, our grantees and our partners understand and “tackle” the structures and systems that work against change.

This strategic plan acknowledges the long standing role of our Association as a convener and leader for collective and transformative action and seeks to elevate that role by maximizing our unique ability to convene a broad range of stakeholders, to be a voice, to lead discourse and to influence governance and policy affecting the issues and communities we seek to improve.

We recognize that partnership across sectors is at the core of transformative change. To forge a stronger network supporting the aspirational goals of philanthropy we will strive to break down barriers and include new donors and new partners, individuals and organizations that will inform and energize our efforts. Critical issues affecting the quality of life in our State will focus our work and drive the engagement of our network.

Driven by the shared interests and goals of our members, our aspiration is to seek all those large and small opportunities to affect lasting change in the communities we serve – opportunities that will exponentially multiply the impact of our individual and collective giving to transform systems.

This strategic direction will be pursued through four goals.

GOAL 1: The Association WILL LEAD, WITH AND FOR ITS MEMBERS, EFFORTS TO INFLUENCE CRITICAL ISSUES AND IMPROVE COMMUNITY CONDITIONS.

The Association will continue to be the best forum for philanthropy to lead and realize the power of intentional collaboration. The shared interests and goals of our member organizations will continue to drive our service and our efforts to seek opportunities, both significant and incremental, with the potential to influence transformative change.

The work of the Association, to support donors in their giving, will continue to be at the core of our mission and services. Programs connect members to a range of philanthropic colleagues, national expertise and trends. Programs are designed to build awareness, deepen knowledge and professional practices, foster collaboration, and leverage the impact of member giving. The issue-area Affinity Group structure allows in-depth exploration of and impact on targeted community concerns. Through Affinity Groups, members become educated about the community, act on shared interests, discuss promising practices and common challenges, engage public officials and decision-makers and explore opportunities for collaborative action. Members increasingly desire action-oriented convening where they not only learn but also determine what actions they can take individually or together to make a difference on a critical issue.

Strategy A: Provide robust educational programming for funders to learn about community issues and effective practice.

Objectives:

1. Promote racial equity and inclusion in member grantmaking practice.
2. Drive effective grantmakings with intentional issue focused programming.
3. Drive potential for collective action by including nonprofit partners and public officials to learn alongside members.
4. Assess effectiveness of programming in achieving strategic goals.

Strategy B: Host initiatives and other special projects to promote collaboration, cross sector partnerships and influence positive community change.

Objectives:

1. Act as a resource to members in the development of special initiatives and projects.
2. Host projects and funds with potential to leverage national funding partnerships.

Strategy C: Collaborate with funders, partners and public officials to influence policy, community investment and implementation.

Objectives:

1. Create forums for public discourse and opportunity for public/private collaborative action.
2. Engage with other networks to increase opportunities to exchange knowledge, gain reciprocal access and inform the Association network toward action.
3. Support affinity groups and projects in public policy engagement efforts.
4. Provide advocacy on federal policy issues that affect charitable giving.

Strategy D: Support our primary partner constituency, the nonprofit community, to build capacity, knowledge and best practices around resource development and funder relationships.

Objectives:

1. Provide opportunities, including educational programming, for direct engagement between grantmakers and grantseekers.
2. Partner with nonprofit leadership to identify strategic opportunities for collaboration.

GOAL 2: The Association WILL GROW AND STRENGTHEN A DIVERSE NETWORK FOR PHILANTHROPY IN MARYLAND.

The Association must forge a strong, diverse network supporting the aspirational goals of philanthropy by breaking down barriers and including new donors and partners, individuals and organizations, informing and energizing our efforts. Demographic trends in our State will present new leaders, new partners and new opportunities for our Association to consider who our next generation of members will be and how we will engage them in an agenda focused on transformative action. The Association's Diversity and Inclusion Committee will guide membership and network development strategies using a diversity and equity lens.

Since 1983, the Association of Baltimore Area Grantmakers has been Maryland's home for foundations, corporations and grantmaking charities to learn and act together. More recently membership eligibility has recognized new types of philanthropies, such as community foundations, donor advised funds and giving circles. To achieve our purpose of maximizing the impact of philanthropic giving on community life, the Association will continue to adapt to the ever evolving landscape of philanthropy. This landscape includes endowed and personal giving as well as partners from the nonprofit, corporate and government sectors. The landscape also includes new strategies such as crowd-funding and impact investing. The forms of philanthropy combined with the traditional work of an Association: convening, sharing expertise, research and policy advocacy enable an increasingly strong network able to apply "capital", in all its forms, for public good. It is our belief that growing a broader, more diverse, network for philanthropy in Maryland will serve our members and provide new opportunities to maximize their collective impact on community life.

Strategy A: Sustain a strong Association through member engagement and cultivation of new members.

Objectives:

1. Identify generational and other transitions happening in member organizations and tailor engagement and service to best serve those evolving needs.
2. Develop outreach strategies tailored to member types and articulating the benefits and value to each.

Strategy B: Adapt the Association's network to reflect the evolving philanthropic community and the inclusion of more diverse perspectives.

Objectives:

1. Proactively evaluate the Association membership model to stay relevant in the current philanthropic landscape.
2. Address equity and access issues as a membership association and as a broader network for philanthropic impact

Strategy C: Cultivate and sustain relationships with organized philanthropy, elected officials, other policy makers and private sector partners.

Objectives:

1. Leverage member relationships to strengthen and promote the network.
2. Support or lead state-wide networks for learning and collaborative action.
3. Act as the intermediary between the regional and the national philanthropic infrastructure.

GOAL 3: The Association WILL CREATE A STRONG BRAND PROMOTING THE ORGANIZATION, MEMBERS AND THE PHILANTHROPIC SECTOR.

The Association must strengthen its role as a central resource and convening space for all forms of philanthropy, driven by issues many of which are regional or statewide. By maximizing our unique ability to convene a broad range of stakeholders; to be a voice, to lead public discourse and to influence governance and policy we will strive impact the challenging social issues that affect our communities.

The Association of Baltimore Area Grantmakers has used a variety of communication tools and strategies to promote the organization, the work of members, raise the voice of philanthropy and build awareness of the philanthropic sector. As the Association's network has grown by

geography and type of philanthropy, so has the need to consider our brand and value to those diverse members, prospective new members and partners we seek to engage. The Association's relevance will be promoted and sustained by growing strategic, effective, collaborative giving across the state, and by positioning the expertise of members as a primary resource to public policy, government and community leaders.

Strategy A: Increase awareness and understanding of the Association's purpose and work to current and prospective members.

Objectives:

1. Survey, research and engage members and the broader network in a rebranding process.
2. Rebrand the Association with a more inclusive identity and name.
3. Develop a brand communication plan focused on target audiences and supporting strategic goals.

Strategy B: Position the Association and its members as thought leaders and primary resources for public policy, government, community leaders and the private sector.

Objectives:

1. Maintain and develop new government relations with local, state and federal representatives to promote the Association and philanthropy.
2. Support members in their role as conveners and content experts.
3. Build a strong public profile with regional and national philanthropic groups.

Strategy C: Build awareness of the work of the philanthropic sector.

Objectives:

1. Promote the work and impact of philanthropy with key audiences.

GOAL 4: The Association WILL ENHANCE THE MEMBER EXPERIENCE.

The Association must continue to meet the evolving needs of its current members, new members and partners engaged in a broader network for philanthropy. Technology will challenge us to balance its use while maintaining authentic relationships and the power of peer to peer connection and learning. Using technology as a tool to enhance member value we will strive to keep pace with today's expectations of instant response, results, and information; acknowledge that members have more options for information, technical assistance and idea sharing as infrastructure groups continue to grow and specialize; and to engage current and new members who are increasingly busy and value their time differently.

The Association of Baltimore Area Grantmakers has always adapted new technology to connect with members and distribute timely information, but technology continues to affect the expectations of members and the capacity of the Association to do its work. Today the Association represents a statewide geography and diverse members, spanning multiple generations of technology users. Working locally and with our national network, the Forum of Regional Associations of Grantmakers, the Association can leverage technology investments to do more with its small staff, add value to membership and put virtual connectivity to work for learning and collaborative action. Many common technologies today did not exist during the previous strategic planning process, and the future pace of change will be even more rapid.

Strategy A: Enhance the value of membership and the member experience by leveraging and investing in technology.

Objectives:

1. Evaluate ways to utilize technology to deliver member services and increase member engagement.
2. Expand use of information management to strategically measure how to engage, broaden and strengthen the network.
3. Explore use of data and systems capability to curate and tailor information.

Strategy B: Leverage technology to improve operational efficiencies.

Objectives:

1. Adopt increasingly integrated technology solutions building on the Association's existing information technology investments.
2. Measure staff activity against member value.