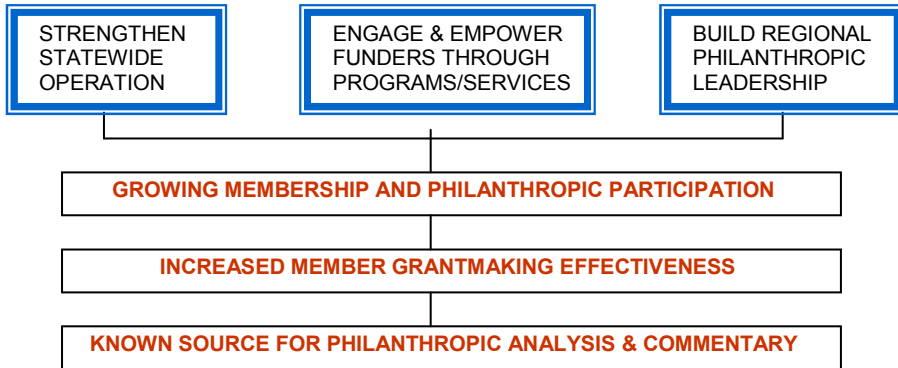


## STRATEGIC PLAN OVERVIEW



### GRANTMAKERS FORUM OF NEW YORK FY 2008 BOARD OF DIRECTORS

*President*, Richard Schwartz, Rochester Area Community Foundation  
*Vice President*, Annette Weld, Halcyon Hill Foundation  
*Treasurer*, Dana Gavenda, Fairport Savings Bank  
*Secretary*, Suzanne Lee, Community Foundation of Elmira-Corning & Finger Lakes  
*At-large*, John Merino, Gebbie Foundation  
Judith Azoff, Jewish Community Federation of Greater Rochester  
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Ann Costello, B. Thomas Golisano Foundation  
George Ferrari, Community Foundation of Tompkins County  
Diana Gurieva, The Dyson Foundation  
Alfred M. Hallenbeck, Kilian J. & Caroline F. Schmitt Foundation  
Diane Hannum, Northern Chautauqua Community Foundation  
Charlotte Landhuis, Rochester Female Charitable Society  
James McBride, Bulrush Foundation  
Arthur Pearce, Tompkins County Foundation  
Christopher Potash, Harter Secrest & Emery, LLPJ  
John Urban, Greater Rochester Health Foundation

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B. Thomas Golisano Foundation  
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Daisy Marquis Jones Foundation  
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919 Winton Road South, Rochester, NY 14618-1633

phone: 585.232.2380 ■ email: [gfnny@grantmakers.org](mailto:gfnny@grantmakers.org) ■ web: [www.grantmakers.org](http://www.grantmakers.org)



## GRANTMAKERS FORUM OF NEW YORK STRATEGIC PLAN FY 2009-2011

*Engaging New York funders in the quest for philanthropic excellence*

### A MESSAGE FROM THE STRATEGIC PLANNING COMMITTEE

Strategic planning, by definition, looks forward. While the Grantmakers Forum of New York FY 2009-2011 strategic plan is focused on the future, it is useful to begin any discussion of its goals and priorities with a look back.

Over its 34 year history, Grantmakers Forum has been a member-focused association with a tradition of networking and education excellence. Serving a small geography encouraged the creation of special projects that benefited the entire nonprofit sector in the Rochester area. Over the past seven years, Grantmakers Forum has grown from a local association serving the counties around Rochester to a statewide organization with members throughout the state.

This growth has brought an infusion of new members to invigorate the organization and new challenges in service. Input from the board of directors and members yielded valuable background for the strategic planning process. Members want Grantmakers Forum to:

- convene their communities around philanthropic issues;
- promote funder collaboration;
- provide leadership in public policy advocacy for funders and philanthropy;
- educate new donors about the vehicles and methods of philanthropy and;
- support effective partnerships between grantmakers and service providers.

The new millennium has brought many changes to the field of philanthropy that affect our region, including:

- The increase in numbers of nonprofit organizations, intensifying the competition for the charitable dollar;
- The escalation of legislative and regulatory activities by government relating to grantmakers and the nonprofit sector;
- The demand for greater accountability and transparency within the charitable sector, especially with regard to the use of charitable gifts and foundation assets;
- The specialization of foundations in their purpose and programs in pursuit mission clarity and greater impact;
- The increase in foundation collaborations ranging from formal agreements with state and local government, program partnerships between foundations and grantees, to joint initiatives involving mutual investment and shared leadership by multiple foundations.

The strategic plan is the Grantmakers Forum blueprint for action as it addresses the challenges and opportunities before us. As the organization works toward its new goals, it will help funders throughout the state achieve their philanthropic aspirations and make our communities thrive.

#### Strategic Planning Committee

Dana Gavenda, Fairport Savings Bank

Suzanne Lee, Community Foundation of Elmira-Corning & the Finger Lakes

Linda Lovejoy, Wegmans Food Markets

John Merino, Gebbie Foundation

Richard Schwartz, Rochester Area Community Foundation

Annette Weld, Halcyon Hill Foundation

Liz Wilder, Grantmakers Forum of New York

### MISSION

Grantmakers Forum of New York unites and empowers funders to achieve their philanthropic aspirations. Through Grantmakers Forum, grantmakers of diverse backgrounds and experience connect to share and increase their knowledge, improve their practice, and address philanthropic opportunities that make a positive social, economic and environmental impact.

## STRATEGIC INITIATIVES

### DEVELOP A STRONG STATEWIDE ORGANIZATION

GOAL: Operate Grantmakers Forum of New York as a statewide organization.

OUTCOME: Grantmakers Forum establishes a statewide presence as a voice of philanthropy with local recognition around the state and increased member recruitment and retention.

METRICS: GFNY will measure and track member recruitment and retention (5% growth/year and 95% retention). GFNY also will track participation in regional and statewide events indicating increased presence.

### INCREASE MEMBER IMPACT AND CAPACITY

GOAL: Engage and empower funders through meaningful programs and services.

OUTCOME: Grantmakers Forum members express satisfaction with programs and services and use knowledge gained to improve their organizations and their grant-making.

METRICS: 50% of members attend programs during the year. Member feedback forms and surveys rate programs and services 4.0 or better for overall satisfaction, knowledge gained, and use in their work.

### PROMOTE THE VALUE OF PHILANTHROPY

GOAL: Build statewide leadership around philanthropic issues and opportunities.

OUTCOME: Grantmakers Forum advocates for philanthropy with policymakers and regulators and comments publicly on philanthropic issues throughout the state. Members are engaged with the public sector around philanthropic issues.

METRICS: GFNY will track instances of advocacy, contacts with policymakers and legislators, and their results. Communications to government and the public will be tracked and assessed for impact.

\*approved by GFNY board of directors May 20, 2008.