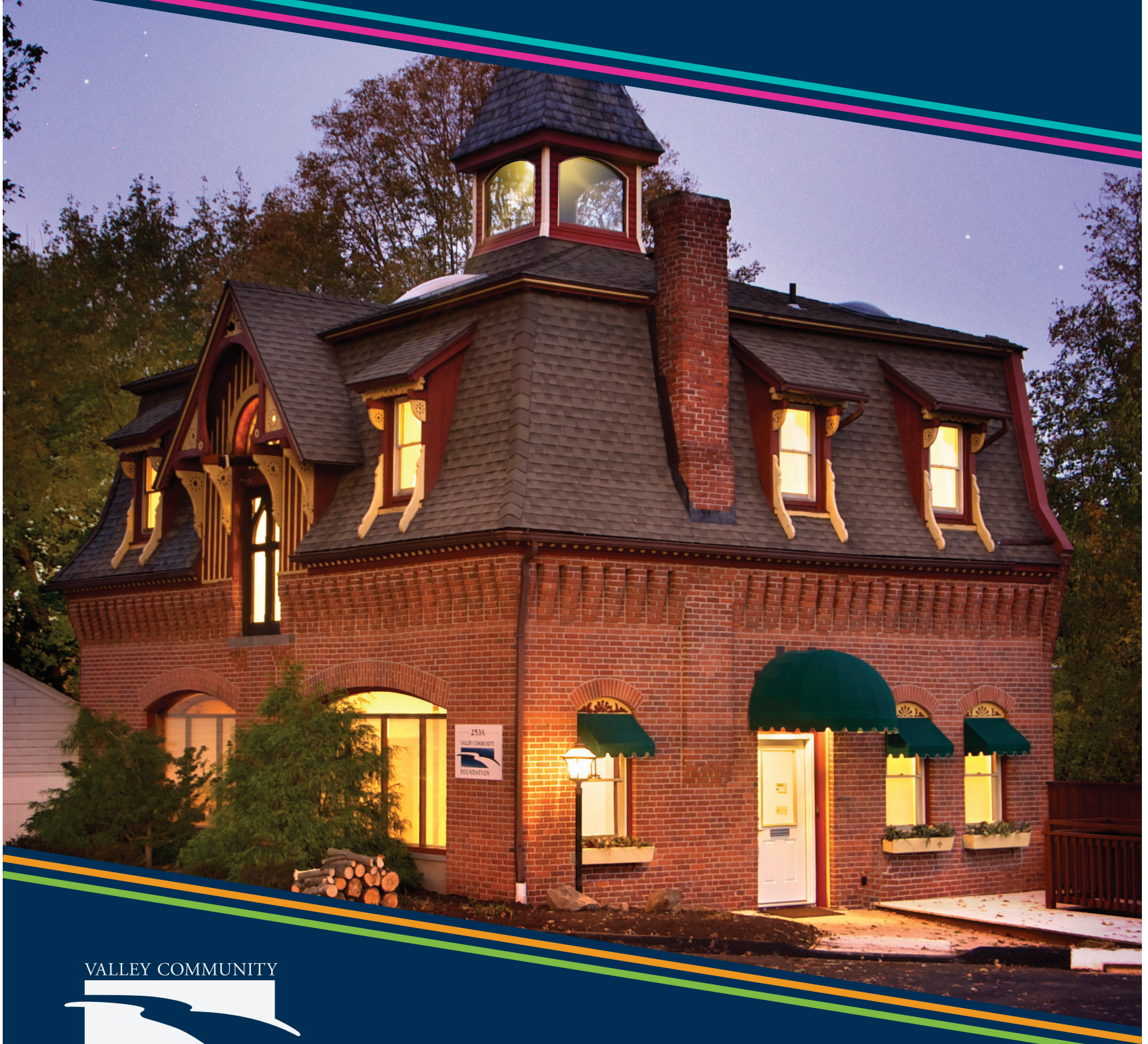


Proud Past...Bright Future

2024–2028 STRATEGIC PLAN



VALLEY COMMUNITY



For Good. For Ever. For the Valley.

Dear Friends:

We are pleased to present to you the Valley Community Foundation's (VCF) 2024-2028 Strategic Plan.

This plan leverages demographic insights, envisioning a stronger and more inclusive Valley. It represents a transformative shift in our role, guided by an updated Mission Statement, new Vision Statement and Values, framed by four key goals.

In crafting this plan, we recognized the uniqueness of our Valley, a place that embodies a deep sense of community spirit and a history of caring for one another. We call it "Valley-ness." Our five-town region — Ansonia, Derby, Oxford, Seymour, and Shelton — is vibrant, diverse, and engaged. We aim to nurture this uniqueness and honor its proud past and rich tradition of welcoming new families and help them appreciate the extraordinary community they now call home.

The 2024-2028 Strategic Plan is not just a road map, but a promise to our community and its future. Through this plan, we aspire to ignite positive change, foster leadership, tackle community issues and secure a bright future for the Valley.

As we embark on this work, you are invited to join us, engage with us, and help us in our mission. Thank you for being part of our VCF family. We look forward to the journey ahead.

The Board of Directors, Board Advisory Council, and Staff
Valley Community Foundation



Our Mission

To inspire philanthropic growth, provide and foster leadership, engage donors, and strengthen the Valley community both now and for future generations.

Our Vision

A vibrant, inclusive Valley that is thriving, collaborative, and generous, with a shared sense of community and opportunity.

Our 20-Year Impact

\$24.3 MILLION

in grants awarded since 2004

261

funds established since 2004

\$35.8 MILLION

total assets as of December 2023

Our Values

ACCESSIBLE... user-friendly to individuals and entities with diverse interests

COMMITTED... to having a stake in solutions, partnerships, and cultivating new leaders

EQUITABLE... always seeking full participation of diverse cultures and perspectives

RESPONSIVE... listening to and addressing the current needs and interests of the community

STRATEGIC... anticipating future needs, opportunities, and solutions

TRUSTED... by the community, donors, and non-profit organizations

UNIFYING... by recognizing the Valley's cohesive regional identity



GOAL 1

GROW VALLEY GIVING AND BUILD THE COMMUNITY'S PHILANTHROPIC ENDOWMENT



A community foundation is a public charity that holds permanent philanthropic funds benefiting the community that it serves. VCF strives to increase philanthropy in the Valley—helping to strengthen our community by providing leadership and financial support to address community needs, both now and in the future.



ESSENTIAL OBJECTIVES

1. Build a Culture of Philanthropy

Situated in the geographic center between three major cities that have substantial resource needs, the Valley has learned to be generous in taking care of its own. It's important to instill that ideal in future generations.

2. Diversify Contributions

To grow philanthropy in the Valley, the Valley Community Foundation (VCF) needs to offer multiple giving options to meet the philanthropic goals of our donors.

3. Attract Planned Gifts

Planned gifts allow donors to utilize their assets to build a legacy for themselves and their families without affecting their current lifestyle.

4. Grow Scholarship Assets

As the cost of education continues to rise, young people in the Valley will need support to further their education beyond high school, helping ensure that they are prepared for living wage jobs.

KEY PERFORMANCE INDICATORS

By 2028, VCF has received \$4.15 million in permanent assets, and doubled the number of individuals establishing planned gifts, by welcoming and encouraging new donors to join its planned giving community: The Gates Society.

GOAL 2

USE FOUNDATION LEADERSHIP AND RESOURCES TO CREATE POSITIVE IMPACT FOR THE VALLEY COMMUNITY



Community foundations can fill a void in the region and be a catalyst for positive change. VCF strategically uses its assets to provide leadership, grantmaking, and scholarships that strengthen our community and nonprofits as a whole.



ESSENTIAL OBJECTIVES

1. Support Efforts to Address Community Issues

By engaging with and listening to our community members and nonprofit leaders, VCF can proactively deploy resources where they are most needed.

2. Build Capacity of Nonprofit Organizations

Valley nonprofits are the core of the region's safety net. VCF will continue to go beyond grant-making to strengthen these organizations, so they can fulfill their missions and be sustainable.

3. Leverage Resources

Combine Valley resources with others to create opportunities to expand community services and introduce new initiatives.

4. Ensure Grantmaking Reflects VCF Values

VCF strives to engage and increase participation with traditionally underserved communities in order to serve the entire Valley. A healthy, inclusive grant program will support a thriving community now and in the future.

5. Nurture Diverse Leadership

Valley leaders should reflect the population of the community they serve. VCF will lead in supporting programs and initiatives that engage, train, and encourage new leaders from the Valley's increasingly diverse backgrounds.

KEY PERFORMANCE INDICATORS

By 2028, VCF's grant program is accessible, reflects the objectives of this plan, and has an established Diversity, Equity, Inclusion and Belonging advisory committee that represents diverse populations and provides insight into needs across the Valley.

GOAL 3

BUILD AND STRENGTHEN AN INFORMED COMMUNITY



An informed community with robust communication outlets helps disseminate information about our Valley, assists community members in making informed decisions, allocates resources effectively, and addresses pressing issues and needs.



ESSENTIAL OBJECTIVES

1. Build Community Knowledge

Improving communication options (newspapers, radio, television, websites, and social media) in the Valley helps build awareness. When residents are informed, they are more likely to become engaged in their community.

2. Expand the Effectiveness of VCF Communications

VCF will use new social media platforms as well as traditional media to better communicate important issues and information about the Valley.

3. Foster Community Conversations

Using data-driven information to spotlight community issues and encourage positive change, these public learning events improve community engagement and foster grassroots participation in the region.

4. Strengthen the Sense of Community

Promoting a sense of Valley spirit and pride (Valley-ness) leads to a more cohesive community that supports neighbors and new residents.

5. Highlight Impact

Sharing real-life stories about VCF's financial impact promotes its mission, vision, and principles throughout the Valley.

KEY PERFORMANCE INDICATORS

By 2028, increase newsletter distribution, boost social media followers, and produce regular community conversation/learning sessions. VCF's volunteer Speakers Bureau supports mission messaging and overall outreach.

GOAL 4

BUILD A MANAGEMENT PROCESS TO ADDRESS RISKS AND OPPORTUNITIES THAT AFFECT THE STABILITY OF VCF



By establishing a vigorous management process for addressing risks and opportunities, VCF can navigate uncertainties while leveraging potential advantages effectively. By identifying and managing risks, VCF will safeguard its resources, reputation, and mission, while seizing opportunities which allow it to grow, adapt, and serve the community in a sustainable manner.



ESSENTIAL OBJECTIVES

1. Strong Fiscal Oversight

Proper management of an operating budget that funds the objectives outlined in the strategic plan is critical to protect our reputation as a trusted steward of donor assets.

2. Ensure Sufficient Resources

To realize the desired outcomes of the strategic plan, it will be essential to have the properly skilled staff and volunteer resources dedicated to moving the mission forward.

3. Increase Volunteer Opportunities

Cultivating strong leadership on our Board of Directors is an ongoing objective. Expanding the Board Advisory Council to include next-generation leaders, family-owned business leaders, and members from diverse backgrounds will expand the Board's knowledge and build future leadership.

4. Maintain a Strong Relationship with The Community Foundation for Greater New Haven (TCF)

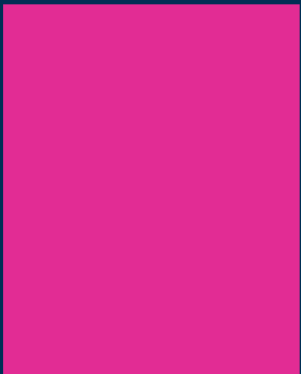
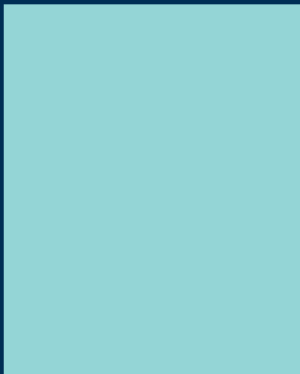
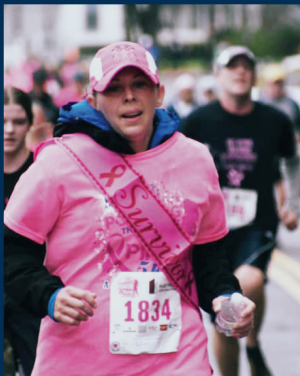
Fostering our ongoing partnership with TCF is vital, as it provides support in investment management, accounting, and programming, as well as over \$1 million in annual funding from TCF's Valley Preference Funds.

5. Review Risks and Opportunities

A semi-annual review of the risks and opportunities that may affect our strategic and annual operating plans is critical to keep our Board fiscally aware and informed of VCF's goals.

KEY PERFORMANCE INDICATORS

By 2028, VCF will have engaged an expanded Board Advisory Council, and has incorporated risk and opportunity review processes to keep the Board informed.



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