



EXECUTIVE SUMMARY
PLANNING STUDY
INTERIM REPORT

Mission and Vision

The Grant County Community Foundation is dedicated to the vision of a shared and vibrant community. Its mission is to enrich lives through collective action. This mission is expressed by:

- Building a culture of philanthropy in Grant County by encouraging charitable giving from individuals, families, organizations and businesses.
- Making grants to advance local non-profits' causes thereby building their capacity to achieve their missions.
- Stewarding donor funds and legacies to ensure sustainability.

Planning Study Goals

The Advisory Board of the Grant County Community Foundation has undertaken a Planning Study to assess opportunities for fundraising programs in support of the mission and vision of the foundation. The goals of the Planning Study are as follows:

- To share with the community's key leaders and opinion-makers the vision, mission and plans of the Grant County Community Foundation
- To learn from these key leaders how the foundation can succeed in implementing its plans, including how to identify prospective donors and volunteers necessary for achieving its financial goals

This Interim Report reflects findings from interviews with 41 key community leaders, completed during the first quarter of 2014. The Advisory Board wishes to acknowledge the generosity, advice and counsel of these community leaders. A list of Interview Respondents is provided as Appendix A of this Interim Report

Findings and Conclusions

The Planning Study focused on assessing the following key elements that are essential components for any successful fundraising program: Case for Support, Leadership, Sources of Support and Public Awareness.

The Case for Support

In summary, the respondents strongly validated the case for the foundation. Of particular value was the foundation's commitment to building the capacity of local non-profit organizations. The proposed programs and services are viewed as new, not "business as usual." The foundation is able to claim an unduplicated "niche" of service to prospective donors and non-profit organizations.

There is significant support for the role of the foundation in serving the philanthropic needs of donors. A number of respondents expressed appreciation for the foundation's potential for making planned giving through estates and wills convenient, reliable and meaningful for families and donors

Another important message that emerged from discussions of the case for supporting the foundation was its promise of keeping these estate gifts "local."

Leadership

Many respondents replied favorably when asked if they would be willing to accept a leadership role with the foundation.

For the foundation to succeed in achieving its stated fundraising goals, it is absolutely necessary to enlist volunteers capable of giving and getting high-level gifts. A focused effort must be made to engage and to enlist the personal commitments of key leadership prospects.

Sources of Support

The study tested a fundraising goal to raise \$1.5 million in five years. Responses ranged from "it will be hard" to "ambitious and wonderful," to "yes, or double that if handled right and you have the right people."

The study revealed that the opportunities for planned giving through wills and estates are strong and timely. A few large gift prospects were identified, but more research is needed before the size of these gifts can be assessed.

Public Awareness

To create the proper "climate" for fundraising success, an organization's case for support must be broadly understood and accepted by both donors and volunteers. While there is a good case to be made for the Grant County Community Foundation, there is a general lack of understanding. If not addressed, this lack of experience and understanding could negatively affect the credibility and prospects for any fundraising campaign. Efforts must emphasize education as much as awareness.

RECOMMENDATIONS

The study revealed that the Grant County Community Foundation can fill a unique, compelling and urgently needed niche of service to the community, its donors and its non-profits. A permanent endowed community fund is the one most compelling opportunity for the foundation to truly expand philanthropic giving in Grant County. To achieve this goal, the Grant

County Community Foundation intends to undertake a comprehensive fundraising program with an initial “working goal” of \$1.5 million. The flexibility of this goal must be accepted in principle, pending additional planning and initial fundraising. The program shall be comprised of two parallel fundraising initiatives:

- A Planned Giving Program to enlist \$500,000 in estate gifts
- An Advancement Campaign to raise \$1 million in outright gifts and pledges payable over three to five years

APPENDIX A

INTERVIEW RESPONDENTS

As of May 1, 2014

Pam Archibald
Janie Bowser
Suzi Calhoun
Kevin Cook
George Dworin
Mattie Eagle
Jeff Goin
Jovita Gonzales
Douglass and Katherine Gorthy
Lee Gruber
Diane Hamilton
Holley Hudgins
James Edd Hughs
Phyllis Jacobs
Jane Janson
Vicki and Don Johnson
Eddy Kartchner
Priscilla Lucero
Rudy Martinez
Christy Miller
Pamela Morgan
Mike Morones
Scott and Michelle Nichols
David Ogilvie
Neysa Pritikin
Ora Rede
Patty Reed
Mary Ann Sedillo
Joe Shepard
Howard and Corinne Smith
Gary Stailey
Tom Stewart
Tony and Susie Trujillo
Kate Watson
Kathleen Wigley
Paul B Wilson